



Coppell Village Business Plan for a Village Sponsored & Supported by the City

FOARD Pillar: Explore new options for 55 plus (or aging in place) that maintain high standard of living while reducing footprint.

Sub-Pillar: Select several key pilot areas, that allow more varied housing options.

Future Oriented Approach to Residential Development Taskforce

CITY COUNCIL PRESENTATION: FEBRUARY 28, 2023

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Coppell Village Business Plan for a Village Sponsored & Supported by the City

Executive Summary – (include goals & objectives + membership parameters + pricing strategy)

In accordance with the Coppell Vision 2040 mantra, to make Coppell a “family community for a lifetime”, The Coppell Village will enable citizens to maneuver the various stages of later life allowing them to age in place, staying in their home and in the community. The Coppell Village will be a ‘virtual’ 55+ Active Adult Community’, where citizens can gain valuable information and resources; acquire assistance with life’s projects requiring help or advocacy; partake in social & educational events keeping them engaged in an active life within our community.

The Village models across the nation allow for citizens to:

- make your own choices about how and where to live as you age.
- live in your own home and community longer with the support services to make it possible.
- connect with, care about and engage with your neighbors, friends and community.
- embrace an active and healthy life.
- explore opportunities for what’s next.
- support your community through volunteering opportunities and giving back.

Thus, Coppell citizens will have an expanded ability to age in place, remaining independent, engaging in the community, and being safe within their home.

The Village-to-Village Network (a consortium of Villages) tool kit provides the ability to start, organize, and implement a Village. The table below shows the overview of the Village model. The Coppell Village will start up with a subset of the services noted in the model based on extensive focus groups that were conducted to fully understand and document what our community citizens feel they need to age in place.



THE VILLAGE MODEL			
	Social Related Services		
	Social Events		
Health Related Services	Cultural Outings		
Transportation	Educational Opportunities		
Exercise Classes	Interest Groups		
Health Companion	Coordinated services within existing programs		
Health Advocate	VILLAGE		
Coordination w/existing Services	Members	Board	
	Director/Staff	Volunteers	Volunteer Based Services
	Website	Partners	Light House Repair
			Grocery Shopping
Referrals of Service Providers			Companionship Services
Formal Vetting of Vendors			Technology Support
Home Repair Services			Food Prep & Delivery
Home Care Services			Coordination of services
Professional Services			
Technology Support			
Food Prep & Delivery			
Aging Services Providers			

In the Coppell Village, 3 major committees will work through their City of Coppell Coordinator to take the lead aligning and coordinating services through:

- city departments (Police Department, & Allies in the Community),
- Coppell Village member committees,
- community volunteers,
- group volunteer organizations that have shown interest in participating, should the city support and sponsor a Coppell Village:
 - Coppell Independent School District,
 - Assistance League of Coppell,
 - Metrocrest,
 - Caregiving Heroes of Coppell Facebook Group,
 - First United Methodist Church
- business partners – the FOARD board didn't feel comfortable talking to business since this is just a high-level theoretical proposal, however, in our research we found that the Container Store supports the Fort Bend YANA program, so it's possible that business partners here in Coppell could also play a role.

While informational meetings have produced a great deal of support of the Coppell Village to flourish, there will need to be one (1) additional full-time headcount added to the City to focus on the ever-evolving Coppell Village through coordination of member committees, expanded services and the service-rendering entities tapped for their expertise. Besides meetings with the general public about the Village model, input and support has been initially reviewed from:

- Coppell Police Department
- Allies for the Community

DRAFT - SUBJECT TO CHANGE

The list of volunteer groups will grow as we do have others that have expressed an interest, but these groups currently provide services or have pledged new services they can provide to citizens who are aging in place within Coppell.

While the FOARD Taskforce is recommending the city take on the Coppell Village for support, other Villages throughout the US have been created by local folks forming a non-profit organization. There are also opportunities for self-funding through grants that can pay for a part or all of it. However, grants are scarce when it comes to a community with our average income. However, if the city wishes to go this route, then the creation of the Coppell Village will take a lot longer than what this proposal suggests, can cost more for 3rd parties to organize, and may never materialize given a possible lack for total commitment for the citizens aging in place here.

Third party vendors can also lend a hand with advertising opportunities in newsletters or website presence – sponsoring events - a kind of self-funding through sponsorship, which can be included with the City sponsored and supported Village as part of the structure requirements, if the city prefers. For purposes of this proposal, the third-party sponsorship is noted in the Financials but not in specifics since this is a very broad business proposal, and the committee was not comfortable speaking directly with any corporations for sponsorship input.

Membership to The Coppell Village will be voluntary and will be available to all citizens who are 55 years of age or older, and live within the city limits taxing authority. More specifically, the citizen can be renting a property, rather than owning, but must be on the water bill and be able to prove age. Members must also provide insight to the Village committees and are encouraged to work with city staff on pertinent decisions about services, referrals, and programs offered by the Village.

Even though the city is 25% of residents 55+, the absolute number we have focused on is the 2526 homes where we know 65+ & disabled folks are living according to Dallas County Tax Exemptions. Using this number of homes, we have set a goal of 250 households joining the Coppell Village during the first whole year of existence. The Village initial offerings will be based on request and may/or may not require the member to pay for the service themselves, the board feels the initial Village should cost each home \$60, which will subsidize the city expenses for this population of citizens.

The FOARD Taskforce recognizes that \$60 a year per household will not totally pay for the extra headcount to oversee the leg work to create, maintain, and run the Coppell Village. Nor will it pay for the large database & application needed to track the operations and auto-email participants. But it will cover the incremental work from each city department to support this undertaking. And it will solidify the community as a place to live for a lifetime. In the event a citizen wishes to be a member of the Coppell Village, but cannot pay the \$60, they will be able to claim a hardship using a form, their latest IRS Tax Return, and meeting the same criteria of income level as for HUD assistance for “Low Income Median”. (Housing & Urban Development Income Threshold Chart is Appendix A)

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To keep the Coppell Village vibrant for every year, all services and programs will be reviewed every 6 months for usage numbers, reviews, and changes if needed to adjust, add, or delete services as needed. For example, if a service or program is not used, then it can be deleted from the village at year end. Likewise, the Coppell Village committees will be inserting various new programs and services, or altering existing services when demand warrants it. The FTE Coordinator will lead and coordinate with the appropriate village committee, for making changes, or creating new services with the documented service and process of usage and upkeep. National trends for Villages are discussed with regularly scheduled meetings of the Village-to-Village Network. It's anticipated that the Coppell Village Coordinator and the 3 committees will attend these meetings which take place virtually.

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Business Concept Overview – (Initial Offerings; City existing equipment needs like membership tracking software breakout; Village foundations of committees and offerings; – defined Committees and who makes up the committee – “how” vendor list is vetted and by who; etc.)

The first 9 to 12 months of the Coppell Village will be spent organizing and creating the support structure within city to launch the initial drive for members, services & programs. Additionally, there will need to be set-up of technology to house and work with following attributes:

- Membership profiles
 - Name(s)
 - Address
 - Phone Number
 - E-Mail
 - Age
 - Hobbies
 - Interests
 - Talents
 - Work Status: Retired; Part Time; Still Working
 - Driving Capabilities (day/night)
 - Member & Volunteer Willingness to Volunteer on which Committee or Talent Need
 - Address Mapped to Zone in Coppell: (1-5 just like the current surveying company uses)
**NOTE: this functionality may be needed for “ride-share” should the committee choose to launch a program to support City events at night, like library Crocheting sessions, etc.
 - Payment information – i.e. date of annual payment and payment amount – “accountant” record
 - E-Mail communication for Village Members
- Volunteering profiles
 - Name(s) – If a member also, then their member profile is tagged as volunteer also, so no “separate” profile is needed
 - Volunteering Organization (this could be “Individual” if they are not affiliated with an organization)
 - Address – Can be individual address or the address for the Volunteering Organization
 - Phone Number
 - E-Mail
 - Volunteer Specific: “Advocacy Program”; Affinity Group, etc.
 - E-Mail communication for Village Volunteers
- Services & Event Forms – These forms must be able to be repetitive on a weekly or monthly or yearly basis, so a new form doesn’t have to be created each time.
 - Service or Event Name:
 - Date / Time
 - Attendance List – Statistics on Age, Gender, should be tabulated from Names for monthly report output – payment status of Attendance List if applicable
 - Sponsor Information

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- Monetary Cost or “value” if any
- Services & Events Not attended or used should be also tabulated per month
- Review auto-emails should be sent after service usage or event occurrence to add to the form and used monthly for reports as well.
- E-Mail communication for Village Events and Services to Village Members
- Vetted Vendor / Business / Supplier Form
 - Vendor / Business / Supplier Name
 - Address
 - Phone Number
 - Specialty or Type of Business
 - Licensed / Bonded – or – Background Checked
 - If Background Checked – by What Company (Background Check should be able to be scanned in as an attachment)
 - Date they were included on the Bi-Annual Listing
 - Discount they agreed too
 - Referred for List by: “City Business Registry”; or “Chamber of Commerce” or “Facebook”; etc.
 - Document Link on Website to open the Vetted Vender / Services Listing

For a city supported and sponsored Coppell Village, it would begin by hiring the Village coordinator who will recruit initial committee members for 3 described committees in this document, that will define roles and responsibilities of the various city departments, volunteer groups; create processes and protocols for each service offered as well as management and periodic self-evaluation of processes and protocols, as well as monthly evaluation of reports from the Coppell Village Database/Application.

The initial Village will offer citizens:

1. Vetted Listings of Businesses and Providers for:

- Home health aide companies
- Cleaning Services or Individuals
- Handymen
- Electricians
- Plumbers
- Landscapers
- Contractors for home modifications
- Roofers
- Bookkeepers
- Estate Planning
 - Attorney’s
 - Investment Counselors
 - Accounting
 - Burial Plans
- Downsizing Experts

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- Life Changes Experts
- 2. Advocacy Help or Assistance with:
 - Identity theft rectification – provided by the Coppell Police Department (both actual police and possibly CPAC members depending on the system constructed by Kelly Luther & Lt. Asher)
NOTE: this advocacy help is ONLY for Identity Theft (not scams) because it requires FTC (Federal Trade Commission) intervention.
 - Medicare & Insurance assistance to organize, understand coverage / policies – Program Committee
 - One-Off projects or problem solving
 - Transportation Options that go beyond what SPAN and others offer –
 - this could include a ride-share for city events (profiles of members and volunteers would ask if they currently drive and if so, would they be willing to provide a ride to city events to a Village member)
 - Go Go Grandparent instructions and FAQs
 - AARP Transportation Information
 - Technical Assistance for smart phones and laptop computers – program could take on the look/feel of the technical assistance offered by YANA / Fort Bend Sheriff Dept., where several member-volunteers are computer savvy and offer precise help on a one-on-one basis – or - mirrored after the Lewisville ISD services provided to Lewisville Senior Thrive Members.
- 3. Friendly check-ins – provided by the Coppell Village Volunteers or COPs (Citizen Patrol through the Coppell Police Department), depending upon type of Friendly Check-Ins (our research of various Villages saw both, weekly phone calls – or - monthly visits depending on city need)
- 4. Social & educational events – Social events and educational events for active adult communities frequently involve actual outings where people gather to carpool to the event.
- 5. Travel opportunities via specialty companies who put together packages for active-adult travel across the metroplex.

In this initial phase, city coordinators (City Enterprise Solutions Dept. (Jerod Anderson); Coppell Police Department, & Allies in the Community) will meet weekly to:

- Establish a Database Application that will serve the cities purposes by capturing Member Profiles, Volunteer Profiles & Types, Village Activity Statistics, and produce various reports on a monthly basis to document programs and services that are used and those not used. The application will also keep track of event registrations, payments, and be able to send e-mails to the entire membership or just a subset that are participating in an event.
 - The Village-to-Village Network has a vendor for this that many Villages use, and that vendor (HelpfulVillage.com, owned by Manuel Acevedo) can be interviewed as a possible Application Provider for the Coppell Village. However, the FOARD board felt the company was small and the application was very rudimentary when it came to the ability of reporting the board felt would be necessary to monitor the success/failure of services and events within the Village.
**Note: The board used our meeting with HelpfulVillage owner to figure costs for the Database/Application needed at a high level in the Financial Section of this document.

- Ensure the new database application can in fact track, and technically function for the best outcome of the Coppell Village by accommodating:
 - (a) new profile types for Coppell Village Members, business partners, and volunteers (individual volunteers as well as group volunteers) &
 - (b) recording of services used or requested by Coppell Village Members &
 - (c) auto-emails and text messaging for members and volunteers for confirming services or date/time appointments, or reminder of event details for a subset of members attending a specific event – or – committee member e-mails for meetings, agendas, & event setup.
 - (d) tracking payments for annual membership, as well as individual events that cost the member
 - (e) geo-coding in the 5 Coppell Areas so if Ride-Share for city events come about, the matching of drivers to riders is easy to assign
 - All of these databases will be constructed with the ability for auto-reporting monthly, documenting the ongoing functions and usage within the Coppell Village.
 - All created database profiles and processes is be documented and maintained so consistency can be achieved from day one and through the years, adjustments can be made to make these processes more efficient or effective depending upon technological changes or needs or membership needs to age in place.
- Create the best process and protocols for creating, and updating The Vendor / Services List, with the initial offering listed in the Business Concept Overview (a vendor list & service list available to members). In reviewing the practices for the List from Fort Bend Sheriff's Office that runs the Fort Bend Village, YANA, the list of vendors comes from the Chamber of Commerce.
 - The Vendor / Services List:
 - A list of Companies or individuals who have been vetted for integrity, honesty, and quality work for maintenance, repair, and personal services for members
 - Vendor Services on the initial launch will
 - (1) mimic the list from Fort Bend's YANA (List in the Business Concept Overview Section) &
 - (2) represent choices for members and doesn't mean the Village guarantees any work or request completion – it is merely a vetted list of reviewed vendors & services that have:
 - reputable businesses (in accordance to the BBB, Yelp, & Google)
 - are licensed & bonded,
 - have been background checked if working as an individual at residences.
 - Will be compiled by the Steering Committee with the help of the City of Coppell, (registered companies doing business within the city) Coppell Chamber of Commerce (Chamber Members), Metrocrest, as well as other sources that the Steering Committee finds
 - Each category of vendor / service should have at least 2 choices if not 3 if in existence. (i.e. Burial Insurance policies are handled by one vendor where the only competition exists at specific cemeteries; but plumbers are more abundant, for 3 choices)
 - If a vendor is not licensed & bonded; then a third-party background check will be warranted. (The Police Department cannot do background checks on individuals unless

they are being employed by the city or they are volunteering for the city in a critical position, therefore, the board has put in a price for a third-party vendor to perform background checks on independent companies that may make the lists, such as handymen, etc.)

- Companies registered with the city and those who are members of The Chamber of Commerce will render some vendors needed for the list; but additionally, the committee compiling the listing should research these companies with all sources:
 - BBB – entity should have an A- rating or better
 - Yelp – entity should have a 4.2 rating or better
 - Google – entity should have a 4.2 rating or better
 - If the City and the Chamber can't produce a vendor or not enough companies in one category then the committee will need to look on the Local Coppell Facebook Page, or Metrocrest, or other resources to find enough choices (2 or 3) for the list. Any additional resources (personal like a handyman) or businesses found from other sources will still go through the same review as those found through the City and the Chamber and will need to meet the criteria as outlined above.
 - National, State, and County Services on the list will not be vetted as they are derived from lists by AARP, the Council on Aging, and government offices
 - The List may include consultant companies or organizations deemed necessary by the Steering Committee to help in completing a large project (EX: Metrocrest Ramp Construction; Downsizing Experts; etc.)
 - Updated twice a year by the Village Member Committee using the prescribed Vendor Listing Procedure which includes how to find participants and vet them
 - Must be completed prior to launch of the Village
 - Is merely a tool for Village members to operate on their own, making it easier to find help when needed without going to family & friends and having to do a great deal of research or using the first vendor they find without having the ability to research the company's viability and integrity
 - The listing should have disclaimers that while the list is vetted for honesty and integrity, the village is not guaranteeing the quality or adhered too timelines of any members using the vendors or services for their projects.
- Review current practices and processes of the YANA Village (You Are Not Alone) in Fort Bend as it relates to friendly checks (checks by phone or in person? Or both? How often? Etc.) for the Coppell Village. (Kelly Luther-Coppell Police Department involved) Process & procedure will be constructed so volunteers can follow it when this service is launched to the membership on day one.
 - Creation & management of performing background checks on some volunteers:
 - Overall volunteers who help set up events, etc will not need to be background checked
 - Volunteers who will be working the Advocacy Programs where they will be working independently with a member and may see sensitive information, will need to have a background check – however some of the anticipated participation is from organizations that already perform background checks:

- CPAC volunteers or police department staff working on identify theft advocacy will have already gone through a background check as part of their CPAC / Police affiliation
 - Charity League volunteers who participate in their Senior Programs at nursing homes, go through a background check by the national club, so any work they choose to do for a Coppel Village will also be at a savings to the city.
 - Volunteers from the community who want to participate in programs where they will be working one-on-one with a member or exposed to sensitive, personal information about the member will need to be background checked by a third-party vendor.
- Creation of process & protocols for the Advocacy Program – i.e., defining the types of advocacy projects and the parameters of assistance will be deemed appropriate for each need.
 - The Advocacy Program – this program will be extremely considerate of a citizen that needs the program because the individuals who help them may be privy to personal information and it's important to be mindful of the security of the member(s) who need the help.
 - Matches Village members with specific project needs with a person to help them with information, definitions, and explanations of items not understood.
 - The one-off projects will be coordinated by the Services Committee and utilize one of the community-based organizations that have expressed interest in working with the Coppel Village.
 - The Identify Theft assistance will be coordinated by the Coppel Police Department. In the case of identity theft, the police must get involved because the rectification comes through the Federal Trade Commission which insists on a police report and report # for their file. The FTC ID Theft site can be complicated to maneuver which is why some citizens may need some extra help.
 - The community-based organizations who have offered support, should the city move forward with a Coppel Village, will work with the Village Steering Committee on written due processes and parameters for taking on a project as well as setting boundaries on projects
 - Some community-based organizations are already working with citizens and thus have been thoroughly with a background check within their organization. In these cases, the Coppel Village will utilize their positive background check and not duplicate any effort which will save money with the shared resources.
 - The community-based organization will share the official records of the Coppel Village when it comes to (1) project type; (2) time spent for project; (3) assignment of personnel assisting member; (4) outcome reviews by both the advocate & the member helped & share a monthly report that outlines the statistics so we can see growth or holes in the program that needs attention (these records should be in the overall application keeping track of such events within the Village)
 - Technical Assistance will fall under Advocacy Program but will mimic either (1) the volunteer system that YANA/Fort Bend Sheriff's Department has in place – or – (2) the services that are in place in Lewisville using the High School Computer Department.
 - Because some technical assistance may accidentally expose the advocate to sensitive information, they will need to be either:

- background checked by a third-party vendor or
 - monitored the entire time helping the member as the case with the Lewisville High School program with Thrive
 - Some Technical Assistance Programs in other villages, connect volunteers who visit members in their homes to help with technical help; in our initial launch the business plan will only lay out a public Technical Assistance Program as listed above
 - The Advocacy Program is not to be used for emergency services - it's to be used for a broader scope project where one-on-one help is needed for guidance and explanation
- Creation and management of the initial Membership Based Committees (although no members exist, the Coppell Village Coordinator will take the lead to recruit 6 to 12 people for each committee so the Village formation can be created and be readied for launch) These active committees will research, construct process & protocols for all the services and events for the initial Village offering; create services and events needed by the Coppell Village. The initial committees will be:
 - Member Recruitment & Engagement Committee (Responsible for the Marketing & continued Public Relations about the Village as well as overall monthly reports monitoring progress):
 - Works intensely with the requirements for a database application that will not only capture the members, volunteers, & business partner profiles, but also documents services, & events and their successfulness as well as their attendants or usage. Define regular monthly reports that need to come from this database and make sure the application can easily generate those reports.
 - works closely with the Member Services staff to welcome new members –
 - MOREOVER, to facilitate and encourage engagement with the Village. *Just as important*, the committee actively seeks ways to help all members enhance their Village experience.
 - They run the “Villages Ambassador Program” matching new members with existing members to foster their involvement.
 - Creates, and disseminates information about the Coppell Village through all communication and media outlets available through the city, volunteer Organizations, etc.
 - Program Committee (Responsible for the Friendly Checks & Social Programs, as well as assisting Affinity Groups):
 - Plans & develops programs and activities for members – focus is on offerings that center on the whole person, mind, body, & spirit; i.e., members keeping active
 - Cultural & educational programs to keep mind and body working; ex: social gathers, museum/historical site trips, performing arts, etc.
 - Affinity Groups – will come after launch since to create and Affinity Group, you need members with the same hobbies or interests
 **Note: Affinity Groups examples: Photography Group, Woodworking Group, Book Club, Dinner Out Club, Gourmet Cooking Club, etc.
 - Exercise & wellness program

- This committee works with transformation/advocacy services – support for ‘life changes’ such as caregivers’ groups for widow/widowers’; specific interest topics of members; facilitate the organized creation, schedule, & running “Affinity Groups”
 - Creates and disseminates information about the Coppell Village programs through all communication and media outlets available through the city, volunteer organizations, etc.
- Service Committee (Responsible for the Vetted Vendor List / Advocacy Program outlined above):
 - Identifying, addressing & facilitating solutions for member’s needs & issues
 - Responsible for the Vetted Vendor / Services List and it’s maintenance.
 - Frontline response to member’s needs & solutions as response. Ex: an expansion of Vetted Vendor types; or expansion of type of advocacy or different methodology for transportation help.
 - Creates, and disseminates information about the Coppell Village through all communication and media outlets available through the city, volunteer Organizations, etc.
- Once a milestone is reached of:
 - Having the city technical databases/application and forms ready for use – i.e. population of members, volunteers, business partners, functional tracking, e-mail/texting forms & triggers, & city website “contact us” form as well as the system is tested thoroughly
 - Vetted vendors / services for initial offering sheet completed
 - Police department is ready to enact process for friendly checks, & Identity Theft Advocacy Assistance
 - Advocacy Assistance or Help options has been created and is ready to launch for:
 - Identity theft rectification – assistance with the Federal Trade Commission Identity Theft website for filing identity theft and record retrieval with the financial institution where the fraud was committed
 - Medicare & Insurance assistance to organize, understand coverage
 - Transportation Options that go beyond what SPAN and others offer with local mileage restrictions. Cost to member is expected with 3rd party solutions such as GoGo Grandparents.
 - Technical Assistance Process developed and ready to implement by the school system or by volunteers

Then recruitment for volunteers and members can begin – this recruitment should be 3 to 4 months prior to expected “Launch” of the Coppell Village. In this way, the initial members will participate in what will be known as the “soft launch” of the Village. It will be a time to work out any kinks or any unknown issues that came up with the working Village.

This will also be the time to form Affinity Groups, and work with members on what expertise they may want to share throughout the village. This will be the time that programs committee has the ability to take off running with the identified “wants” of the Village community.

Management & Organization Overview / Business Operations Overview – (including employee needs) (Goods & Services) – defined jobs within city services/departments & volunteer groups – defined Committees and who makes up the committee – “how” vendor list is vetted and by who; etc.)

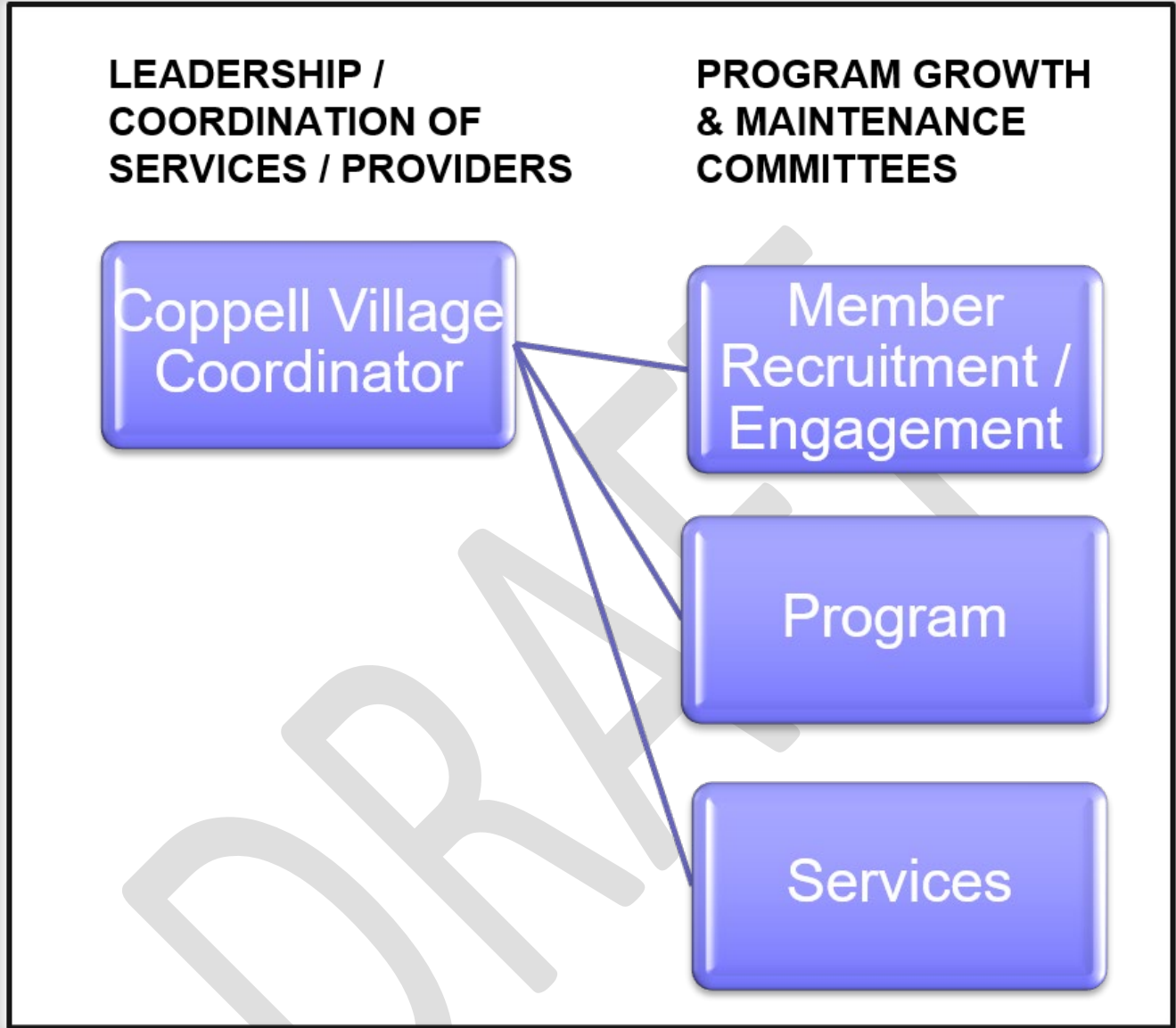
The Coppell Village Coordinator will provide the main leadership/coordination of the overall Village and daily operations. They will also be directly involved with the databases needed to track the Village members, activities, processes, & procedures. The Coppell Village Coordinator will need a phone number and a backup of someone to answer their phone if they are out so that high-level questions about the Coppell Village can be answered or messages taken for the coordinator. Additionally, he/she will be the financial focal point for the Coppell Village as well.

The Coppell Village Coordinator will also be an integral part of the committees working with the city departments and the community-based organizations on all offerings from the Village. This coordinator will also review all the affinity groups or programs being constructed for the Village, prior to their offering, so they can make sure they don't need additional review by the Director of Community Experience.

The working committees mentioned above (Member Recruitment / Engagement; Program; & Service) will meet every month to:

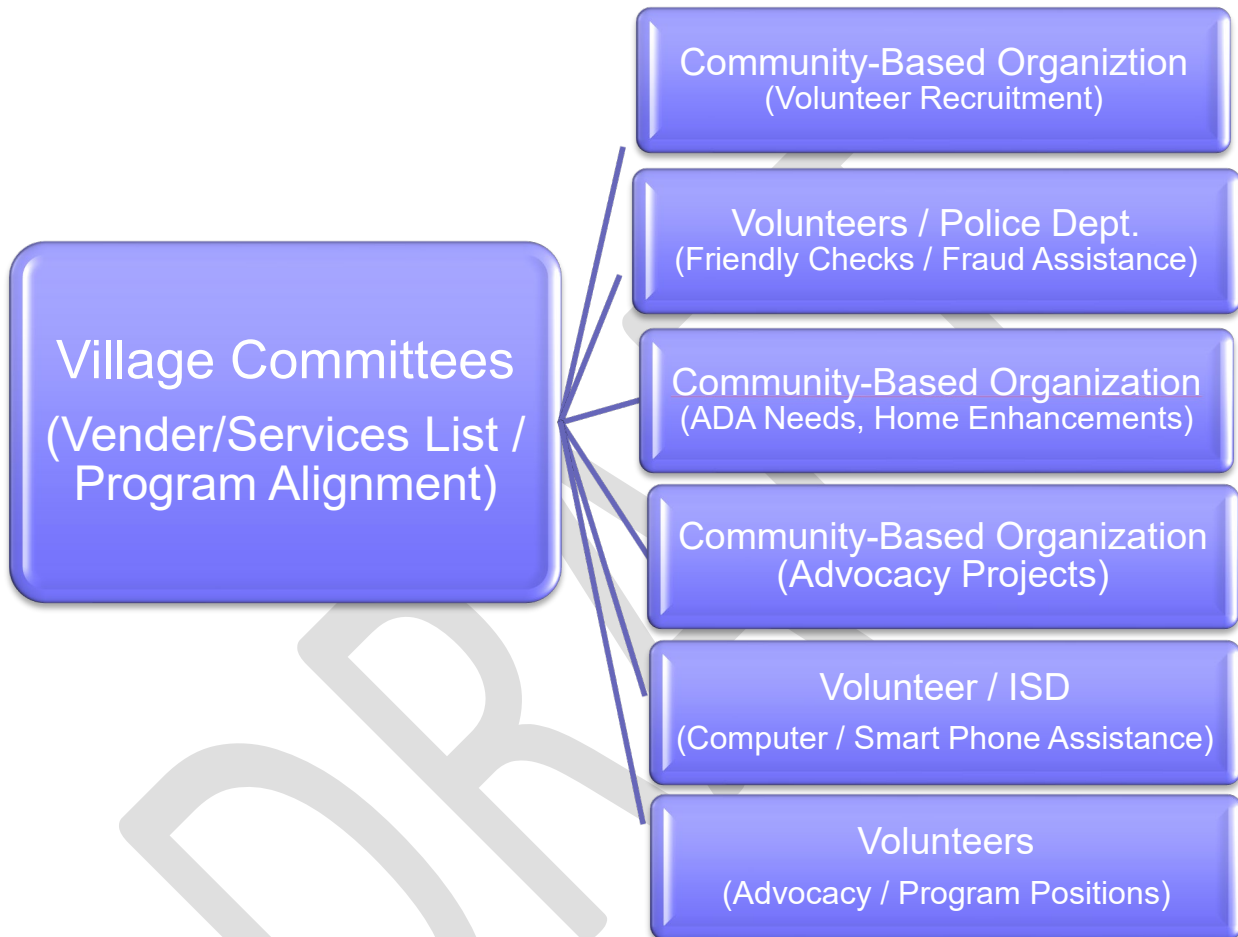
- go over activity usage (review usage and make decisions to change services/activities to make them more conducive to citizen need or abandon the ones that are not being utilized)
- review new activities, services, or needs for the Village community and how they can be done
- organize and monitor the Affinity Groups for changes; create programs needed by the community and coordinate date/time/place for those
- align written pamphlets, e-mails, etc. for the Village communication accuracy and timeliness

Organizational Overview picture is as follows:



**LEADERSHIP /
COORDINATION OF
SERVICES / PROVIDERS**

PROVIDERS OF SERVICES



Organizational Timeline – (timeline of preparing city databases for member profile entry; timeline for forming the Village; timeline for lining up initial offerings / opening up member sign-up / etc.)

If the City Council decides to move forward with the Coppell Village, the city will begin advertising and hire a full-time Coordinator for the Coppell Village based on the Job Description (Appendix B). The hiring for this position should take no longer than 3 months. The first day of the coordinators day on the job begins the first day of a 9-to-12-month journey to construct the Coppell Village. The following is a list of items that will need to get done during this ‘construction’ period:

The following tasks need to get accomplished during these 9 to 12 months in order to launch a Coppell Village:

- City Enterprise Solutions department works with the Coppell Village Coordinator to set up the Database/Application with direct input from the 3 major committees, city departments, and community-based organizations performing services:
 - database of Volunteers;
 - database of Members;
 - Record keeping for events; services, etc.;
 - Reports for events; services etc.
 - E-Mail communication for Village
- Coppell Village Coordinator puts together a body of perspective members of the Coppell Village (named “Village Body”) (no fewer than 6; no more than 12) to work on the 3 committees that will begin the task of putting together the Coppell Village, services offered by the Village and to write up the processes and procedures for each offering. These citizens that agree to sit on the 3 committees should come from all age groups that would be eligible to be a Village member. Recruiting can be done using the water bill system from 65+ citizens, as well as core memberships for citizens 55+.
- Village Body starts putting the processes and procedures together
- Coppell Village Coordinator & Village Body Committees starts coordinating with Coppell Police and other volunteering agencies on processes and procedures for the services they will be offering
- Coppell Village Coordinator & Village Body Committees to coordinate with City Enterprise Solutions department on creation & testing of database system supporting the Village
- Coppell Village Coordinator and Village Body creates and maintains Procedure Book to capture processes/procedures for each service offered and Methods of Procedures for how processes work, like “vetting vendors for vendor listing”; etc.
- Massive advertising (See Marketing Plan below) and recruitment for volunteers and members for soft launch of program
- Initial Offerings launch – The Coppell Village is now Active
- Recruitment of new members though city marketing capabilities
- Monthly review of:
 - Membership numbers
 - Volunteer numbers
 - Services used by age-group & how many times
 - Reviews of service providers and of members using services

DRAFT - SUBJECT TO CHANGE

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Preliminary Budget Estimate for Coppell Village

** Assumption: 250 Membership on Full 1st Year, with 25% Growth each year (based on 1910 Homes in 2021 with 65+ tax exemptions)
 ** Assumption: 3% Increase in Goods & Services Over the Years (Salary + Benefits)
 ** Assumption: Village to Village Membership remains constant to keep up with trends & updates
 ** Coppell Village Database & Application is based on HelpfulVillage.com (Common Village Application)

INCOME	Description	Year 1 \$\$	Year 2 \$\$	Year 3 \$\$	Year 4 \$\$	Year 5 \$\$
Revenue Financial	Membership Fees: \$60 Flat Fee					
	YR 1 = 250 Members					
	YR 2 = 312 Members					
	YR 3 = 390 Members	\$12,500.00	\$18,720.00	\$23,400.00	\$29,280.00	\$36,600.00
	YR 4 = 488 Members					
	YR 5 = 610 Members					
Corporate Sponsorship	Possible Underwriting for Events from Corp.					
Donations	Possible Fundraisers (ex: T-Shirts)					
REVENUE TOTAL:		\$12,500.00	\$18,720.00	\$23,400.00	\$29,280.00	\$36,600.00

EXPENSES	Description	Year 1 \$\$	Year 2 \$\$	Year 3 \$\$	Year 4 \$\$	Year 5 \$\$
Projected P&L Expenses	Actual payments needed to Vendors & for Salaries					
	Village-to- Village Membership	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00
	Helpful Village Software (Year 1 has one-time fee built-in + some customization & development costs versus other years)	\$19,300.00	\$5,744.00	\$6,680.00	\$7,856.00	\$9,320.00
	Mail Chimp to integrate with Helpful Village	\$240.00	\$240.00	\$240.00	\$240.00	\$240.00
	Salaries (FTE - Coordinator)	\$65,000.00	\$66,950.00	\$68,958.50	\$71,027.26	\$73,158.07
	Benefits (FTE - Coordinator)	\$22,750.00	\$23,432.50	\$24,135.48	\$24,859.54	\$25,605.33
	Computer HW and SW	\$3,400.00	\$0.00	\$0.00	\$0.00	\$0.00
	Cell phones	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00
	3rd Party Background Checks	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00
PROJECTED P&L EXPENSE TOTAL:		\$112,440.00	\$98,116.50	\$101,763.98	\$105,732.79	\$110,073.40

Direct City Projected Expenses	Normal Departmental Funds + extra used for Coppell Village too (i.e. Police Citizen Patrol cars, training, people; City Website presence, pamphlets, brochures, etc.)					
	Police Advocacy for Fraud (\$30 per hour for extra assistance) Assumption: 10 people need extra hour per year	\$300.00	\$300.00	\$300.00	\$300.00	\$300.00
	Office Supplies (Incremental Elevation)	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00	\$1,200.00
	Food and Beverage (Incremental Elevation)	\$200.00	\$200.00	\$200.00	\$200.00	\$200.00
	Training - Software or City Training	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
	Printing	\$200.00	\$200.00	\$200.00	\$200.00	\$200.00
	Marketing	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00
	Volunteer Training (Police Dept) (\$40 per hour for Instructor / Supplies)	\$80.00	\$80.00	\$80.00	\$80.00	\$80.00
	Paper	\$200.00	\$200.00	\$200.00	\$200.00	\$200.00
	Promotional Gifts	\$200.00	\$200.00	\$200.00	\$200.00	\$200.00
	Public Service Video Production	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00	\$3,000.00
DIRECT CITY PROJECTED EXPENSES TOTAL:		\$7,380.00	\$7,380.00	\$7,380.00	\$7,380.00	\$7,380.00

TOTAL BUDGET FOR COPPELL VILLAGE:		\$119,820.00	\$105,496.50	\$109,143.98	\$113,112.79	\$117,453.40
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DRAFT - SUBJECT TO CHANGE

Projections & Pro-Forma

Marketing Plan

Marketing Plan: Marketing for the Coppell Village should take advantage of all of the marketing channels available to the Coppell City Communications Department. There should be two phases to the marketing with each phase broken into specific verticals.

Phase One – Initial Recruitment

Initial recruitment can be further divided into three verticals.

- **3 Village Committees** recruitment
- **Membership** recruitment
- **Volunteer** recruitment

3 Village Committees (Member Recruitment/Engagement; Program; & Services) – These 3 committees will work within their group on their segments of the Village and along with constructing those segments, they will be compiling marketing materials for each facet being worked on.

Marketing Campaign Options

1. Word of mouth enlisting our volunteer partners; Allies, Citizen's Patrol, Non-Profit partners.
 - a. This could help make sure that all volunteers are people who will be fully engaged and have participated in other efforts.
2. Open call using Coppell Newsletter/E-Newsletter.

Membership – these are the people who will take advantage of the Village services. All members have the ability to also serve as volunteers if necessary.

Timeline for Membership recruitment marketing – Three months from proposed launch date. This date can be flexible and move based on the progress toward the actual launch.

Marketing Campaign Options

1. Need a Coppell Village is coming campaign.
 - a. Content explains what the Coppell Village is so that it is not confusing.
 - b. Start – when Village is approved.
 - c. Offer more informational meetings.
 - d. Signup interest list is collected.
 - i. Name
 - ii. Address
 - iii. Email
 - iv. Willingness to participate in formation committees

- v. Willingness to volunteer as well as receive services.
- e. Channels
 - i. Water bill Newsletter/E-Newsletter
 - ii. Coppell Happenings Magazine
 - iii. Social Media – FB, Instagram, Twitter, WhatsApp (if available)
 - iv. Mail campaign sent out to all residents who have a 65+ homestead exemption.
 - v. Only go to Ads if necessary
 - vi. Include a way for people to invite their friends to join.
- f. Budget
 - i. The Mail campaign to 65+ would have additional costs over normal channel costs.
 - ii. Ads if necessary, would have additional costs.
- g. Questions
 - i. Do we want to limit membership at first so as not to overwhelm the village when it starts?
 - 1. If yes, then we want to market this group as the pioneers that will help test out the Villages processes and procedures. Something like we are recruiting a cohort of xxx hundred people to kick off the village.
 - 2. Duration until the cohort is filled.
 - 3. Even if we do this, we want to signup everyone we can, maybe the early cohort will push people to sign up faster and not put it off.

Volunteers – these are the people who perform or will help village members obtain village services. A volunteer can also be a member.

Timeline for Volunteer recruitment marketing – Three months from proposed launch date. This date can be flexible and move based on the progress toward the actual.

Marketing Campaign Options

1. Need a Coppell Village is coming campaign. Combined with the member its coming campaign.
 - a. Content explains what the Coppell Village is and how the volunteers can help.
 - b. Start – when Village is approved.
 - c. Offer more informational meetings.
 - d. Signup interest list is collected.
 - i. Name
 - ii. Address
 - iii. Email
 - iv. Willingness to participate in formation committees.
 - v. Willingness to volunteer as well as receive services.
 - e. Channels

- i. Coordinated email campaigns with all of the partner organizations to get the word out to their members.
 - ii. Water bill Newsletter/E-Newsletter
 - iii. Social Media – FB, Instagram, Twitter, WhatsApp (if available)
 - iv. Only go to Ads if necessary
 - v. Include a way for people to invite their friends to join.
- f. Budget
 - i.
- g. Questions
 - i. Do we want to have separate campaigns, different blurbs for members vs volunteers?
 - 1. Example: Would you like to help your fellow citizens. Volunteer with the new Coppell Village helping Coppell Citizens stay in their homes, making Coppell a community for a lifetime.

Phase Two – Ongoing Recruitment

Continuous recruitment can be further divided into three verticals.

- **Membership** recruitment
- **Volunteer** recruitment

The only major differences between the initial and ongoing will be the types of content presented in the adds which should be rotated.

- Same as initial recruitment with explanations of the village.
- Informational types of content with number of members, services provided per month, number of volunteers, hours donated per month.

Slice of life with stories of how the village helped a specific Village member or how it affected a volunteer.

APPENDIX A: HUD Income Thresholds

Housing and Urban Development (HUD) Income Guidelines

HUD INCOME GUIDELINES

Effective April 2021, Median Income is defined as the middle income level at which one-half of all households in the community earn the money, and one-half of all households earn less. The median area family income is estimated by HUD on a local basis, and is further broken down according to family size. HUD updates these income limits annually.

- **Extremely Low Income:** 30 percent of the area median family income or below
- **Low Income:** 50 percent of the area median family income or below
- **Moderate Income:** 80 percent of the area median family income or below

The following chart represents HUD income limits for Dallas County. Please call the Community Development Division for updates at (972) 721-4800.

CURRENT DALLAS COUNTY MEDIAN INCOME LIMITS

Family Size	Very Low Income (30% of Median)	Low Income (50% of Median)	Moderate Income (80% of Median)
1	\$18,700	\$31,150	\$49,850
2	\$21,400	\$35,600	\$57,000
3	\$24,050	\$40,000	\$64,100
4	\$26,700	\$44,500	\$71,200
5	\$31,040	\$48,100	\$76,900
6	\$35,580	\$51,650	\$82,600
7	\$40,120	\$55,200	\$88,300
8	\$44,660	\$58,750	\$94,000

Appendix B: Job Description for Coppell Village Coordinator

The Coordinator for the Coppell Village will:

Guide Village Committees to construct & vet the Vetted Vendor / Services List

Oversee processes for background checks on volunteers

Guide Village Committees on their duties to:

1. Welcome New Members & get them involved
2. Secure Profiles on Members & Volunteers & Business Partners
3. Gain marketing opportunities whenever presented
4. Update Strategic Plan & iterations of community needs

Recruit Business Partners

Test process enhancements & improvements

Advocate for intradepartmental support

Brand & socialize Coppell Village within city structure & events

FTE Function

Vet Suppliers

Process background checks

Handle Public Relations

Process Applications and Welcome

Brand and Socialize Project

Advocate for Intradepartmental support

Test Processes and Improvements

Maintain accurate records for public/retention and audit

Update Strategic Plan and Iteration of Community Need

Collaborate with Community Interests

Create Value in the Coppell Village as it Evolves

Tie to Social Media Outreach