

A Winning Strategy

Engaging Your Greater Community

By Nikki Rineer, President

With implementation of the Affordable Care Act and challenges to tax exemption looming, it is increasingly important for senior living organizations to engage the greater community beyond their four walls. Partnership building is critical in these times, and fulfilling the not-for-profit mission requires a broader view of who the provider organizations' constituents truly are. As the nation's economy has struggled over the past 10 years, local governments, school districts and municipalities have had no choice but to find new revenue sources to fund essential programming. In their quest to establish new opportunities to find those "lost" dollars, the taxing entities have targeted some not-for-profit senior living communities, questioning their relevance to the greater community and their tax exemptions. Media coverage has compounded the level of scrutiny by spotlighting high-level court cases as well as revealing top executives' salaries and benefits, making it more imperative for senior living organizations to prove the value of their contribution outside the organization.

Tracking social accountability efforts is a crucial step in establishing an organization's value to the community. Most senior living providers are well familiar with the need to document the value of charitable care, meeting space, volunteer hours and other assorted contributions. Many providers, such as The American Baptist Homes of the West, have kept detailed and robust records of their contributions to the greater communities they serve. There are senior living communities who have mastered collaborations and partnerships within their external community, such as

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Carol Woods Retirement Community in Chapel Hill, NC. However, many others have created a walled city all of their own – a community that functions independently, and views its role exclusively as

caretaker of a "community within the community." Providers with this mindset are those who are faced with the most vigorous challenge from their greater communities and taxing entities in the future. The time has come for all senior living providers to reposition themselves as the expert in all things senior in both their internal and external communities. Mastering the art of community engagement is the place to begin this important journey. Community engagement is the art of creating partnerships through the exchange of information and expertise that will empower and strengthen both the internal and external community.

Why It's Important

According to the US Census Bureau, 40.2 million of our nation's population in 2010 was age 60 or greater. By 2050, this number is projected to rise to 88.5 million – an increase of more than 120%. This kind of rapid growth will prove to be one of the greatest challenges in our society as more and more of the population step into their next 50 years. The experts in navigating this journey already exist, and they can be found within the walls of any senior living organization. Utilizing the knowledge of this leadership team is imperative as we work together to craft how seniors want to live and be

cared for in the future. Statistics also tell us that more than 8 out of 10 seniors prefer to stay in their own homes as long as possible. What services and outreach might provider organizations create that will meet this need?

While serving all seniors, not just those living in the buildings or currently receiving services should be a moral obligation, there is also a host of other reasons why community engagement should become the life blood of a not-for-profit organization. Boards are often comprised of local community members who value external engagement by the senior living organization. Partnership building with other healthcare and senior services entities in the greater community is good strategy as seamless continuums of care are being built. The opportunity for not-for-profit senior living providers to be seen as community leaders and to brand their organizations as experts in aging has never been greater. There are also strategic initiatives that will help organizations position themselves favorably in the eyes of future customers.

Ways To Engage

Information is a key way to start. The credibility of the organization depends on the ability to articulate what is going on with seniors in the region. Gleaning local demographics related to older residents through a secondary data profile is a perfect starting point and will assist in verifying what the needs of those individuals might be. Secondary data is gathering information from existing data sources that will provide understanding of strengths and opportunities that exist in any given location. The US Census, local health departments, state departments and a variety of other community, civic and social service agencies publish data that provide valuable information about community needs and trends. Understanding the makeup of the community through secondary data is imperative and will provide a firm foundation to begin partnerships within the community.

Supplement the secondary data with key informant interviews, comprised of those “in the know” about what is going on with seniors, their needs, and the gaps in service offerings. These informants will be pleased to

share their knowledge and offer significant partnership potential. Their perspectives add credibility to the secondary data, which only tells half the story. Once information has been collected, it needs to be shared. Host a community forum that brings together local decision makers. This creates the perfect venue to vet secondary data and key informant interview findings, and ascertain how the information gleaned might be used to move forward. The meeting should begin by revealing the statistics and identifying key

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themes that could be found in the data sources. However, information alone is not enough. To truly engage, there must be a humble and open dialogue that garners and asks others for their opinions, feedback and experiences. No organization will be able to single-handedly tackle all of the issues discovered during the mining of the data. With that in mind, other community stakeholders must be invited to join the effort, encouraging everyone to be an active part of the creative and collaborative process. Together, you will be able to create a vision for senior life in your community, and begin working on a joint plan to improve it.

Taking Engagement To The Next Level

Now it is time to coalesce the ideas about what the partners want to tackle in order to increase the quality of life for seniors in the community. Imagine learning that a significant number of seniors living alone in the community are looking for handyman services, and your organization has the bandwidth to provide these services, as is the case with Eaton Senior Services of Colorado. Perhaps the now disbanded Meals on Wheels operation is sorely missed by a host of seniors.

This data will allow the senior living community to strategically pivot their organization's programming needs for the upcoming future. If funding is an issue, there are a plethora of organizations that might want to fund a new program, based on the information that has been revealed through the data mining process. From Community Foundations to United Way to federal grants, there are many organizations that have a passion to serve seniors in the communities. Many initiatives throughout the nation have been funded by Grantmakers in Aging, The Robert Wood Johnson Foundation and the World Health Organization for work in creating Age-friendly cities.

Now that the community's attention has been caught and new partnerships have been formed, continue the conversation. Is there an increased likelihood that the community hospital wants to partner in an ACO with you? Does the local TV station want to regularly feature data from the senior needs assessment? Are there opportunities for collaboration with the local Area Agency on Aging by offering respite services to senior caregivers? The possibilities are endless as you are now seen as a senior living organization, a community leader and strategic asset within the greater community

What's The Bottom Line For Your Organization?

There are a host of benefits to enlisting an effort into Community Engagement:

You can now be seen as an expert in all things senior within the greater community.

- An entire new set of strategic partners with whom to collaborate and network.
- People from the greater community are more likely to send referrals to those in the network.
- The mission of the organization is now evident throughout the greater community; your board feels a sense of pride that you are seen as a strategic asset.
- Residents and employees are proud of the involvement and are now more willing to get involved themselves.
- Social Accountability is now being demonstrated in a visible way and taxing entities can readily see the contribution.
- Your networking and social capital has paid off, and you are seen as a true community leader whose opinions and partnership are truly valued.
- The taxing entities are less inclined to challenge your tax exemption.

Let's be clear—community engagement is more than just a way to ensure that your tax-exempt status remains intact. This is about the intrinsic value that can be brought by positioning a not-for-profit organization to have an outward facing focus. Nothing can be more powerful than creating space for members of the greater community to tell the story of the true impact your organization has had in their community. True community engagement is the wise, strategic choice for “walking the talk” of the not-for-profit mission and knowing that your greater community is better off because of your organization's contribution.

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