Lisa Scott McCracken

President, Holleran
Purpose of Today’s Webinar

- To share with attendees the importance of messaging, both internally and externally, in an organization’s Social Accountability Program.

- To provide tips and suggestions on effective communication strategies with respect to Social Accountability reporting.

- To hear from a provider about their messaging efforts and how they “Tell the Story” of their Social Accountability initiatives.
We often only focus externally, forgetting about internal stakeholders:
- Residents
- Family Members
- Staff
- Board Members

The message might vary slightly with each stakeholder group (Example: With staff, might want to share scholarship dollars awarded to advance healthcare field. Family members might want to hear about charity care or caregiver support groups.)

You need your internal stakeholders to be your champions and help you tell your story.
What do others produce?

Holleran/LeadingAge National CCRC Study:

Does the organization produce an annual Social Accountability report?

- No: 44.5%
- Yes: 55.5%

52.6% say Independent Report (not embedded in another report)
Tips on Effective SA Reports

- Report name can vary:
  - “Report to the Community”
  - “Community Engagement Report”
  - “Report on Social Accountability”

- Keep in mind the premise of “Telling Your Story”
  - Don’t just list activities like a phone book!
  - Make it compelling
  - Highlight case studies; Tell stories; Share pictures
  - Can’t be all “fluff”
  - Encourage balance of hard facts/data and narrative
  - Don’t totally leave out if compelling, but perhaps doesn’t fully “count” per IRS standards
Recommend you **Do Not**...

- Try to avoid:
  - Taking credit for individual, self-initiated work of staff and/or residents; Who is really leading the way?
  
  - Significant promotion of vast number of states/geographic area where residents have come from (keep in mind local focus; this more appropriate for marketing perhaps)
  
  - Things like above could backfire if not done right
Considerations Outside of Annual Report

- Newsletters
  - Employee newsletters
  - Family member newsletters
  - Resident newsletters
- Messaging through Resident Council/Family Members
- Ads in local newspaper
- Perhaps mention of your outreach/support in another organization’s newsletter or annual report? (Have others promote you!)
- Highlight throughout the year on Facebook page, Twitter, other social media outlets
- Make reports readily available via website
Sample Reports

- These reports can serve as examples:
  - Masonic Villages of PA
  - ABHOW
Tim Carmichael

*Director, Inspired Living Institute*

La Posada
The Drive to be Accountable

- Is an Extension of La Posada’s Mission
- Conveys to the Community La Posada’s Existence
- Is Important to Key Decision-makers, e.g., legislators, business leaders, that La Posada is Fulfilling its Mission to be a Community Asset.
- Is a Part of La Posada Culture: Employees and Residents Understand the Obligation
Methods of Communication

1. Residents of La Posada
   - New Resident Orientation
   - Quarterly Resident Business Meetings
   - Resident Newsletters (LP Directed) & Newspaper (Resident Directed)

2. Employees of La Posada
   - Quarterly Employee “Forums” or Meetings
   - Employee Newsletters
Methods of Communication

3. La Posada Board of Trustee Expectations
   - Monthly Operations Report (6 Objectives or “Ends”)
   - One of the “Ends” is Focused on La Posada’s Greater Leadership within the Local, State and National Communities

4. To the Local Community
   - Quarterly Full-Page, Color Newspaper Ads
   - Annual Report
   - Part of La Posada’s Message for Accreditation (CARF-CCAC)
1. Follow “Leading Age’s” Annual Theme
Example of Quarterly Full Page Newspaper Advertisement

2006 Leading Age Theme was “Tell Your Story.”
2. List Your Organization’s Partnerships and Connections to the Community

3. Quantify in dollars, the In-Kind Services and Time that Your Employees, Management Staff, and Volunteers Provide to the Community
We are La Posada... Do we make a difference?

“The role of not-for-profits, as one of three major institutions in America, is nothing less than to change lives.”
— Peter Drucker

Note: Partnerships and Quantifiable Dollars and Time
We Are Accountable
- We are the largest employer in Green Valley, with a large base of professionals dedicated and trained to provide housing, services and healthcare to seniors.
- We have a long-term commitment to Green Valley.
- We believe we have a role as a community leader and catalyst toward serving seniors.
- La Posada management provides local, state, and national leadership in interests that affect seniors.
- We are a nationally accredited, continuing care retirement community.

For 2009
- La Posada’s total of persons served:
  - 690 apartment and garden home residents
  - 147 Assisted Living and Memory Care residents
  - 294 individuals throughout the year in our skilled nursing home
  - 1,217 individuals in the area served by La Posada Outpatient Therapies (90% from outside La Posada)
- La Posada’s Scholarship Fund distributed $67,935 in 2009 for 75 individuals.
- La Posada provided meaningful employment for 684 individuals in 2009, with a payroll of $14,813,375, much of which is spent in this area.
- La Posada residents and board members contributed 58,744 volunteer hours to the well being of the community.
- La Posada staff provided 2,892 hours in community leadership, valued at $136,695.
- La Posada provided clinical and classroom space to train 93 CNAs for the community.
- La Posada donated 647 pounds to the Food Bank.
- La Posada recycled more than 233,000 pounds of recyclable material.

We thank Green Valley for the opportunities we’ve been given to serve and support. We look forward to being part of Green Valley’s future. We are committed to you and to making the Greater Green Valley community an even better place to live and work.

Ian Winfield, M.D., Chair
La Posada Board of Trustees

Lisa H. Israel
La Posada President & CEO

Community Partnerships
La Posada supported the following organizations through leadership, volunteer time, facility space or financial support:

- AARP Tax Assistance
- AAUW
- Aging Services of Arizona
- ALOHA
- Alpha Xi Delta
- Sonora Desert Scribes
- Alzheimer’s Family Support
- Art Critique Group
- Artist 13
- AZ Dept. of Public Safety
- Cactus Wien
- Casa de Esperanza
- Catholic Daughters
- Chamber of Commerce
- U of A Data Collection
- Chi Omega
- Compassion in Choices
- Continental School
- Covenant Group
- Cronie’s Circle
- Danish Club
- DAR
- Democratic Women’s Group
- Desert Gardeners
- Direct Caregivers Association
- FICO
- Friends of Madera Canyon
- Green Valley
- Chamber of Commerce
- Green Valley Desert Gardners
- Green Valley Naval Aviators
- Green Valley News
- Green Valley Organ Players Club
- Green Valley Rotary
- Green Valley Shriners
- GY Flyers
- Illini Club
- Kiwanis
- La Canoa Lions Club
- League of Women Voters
- Life After Loss Support Group
- Network of Caring
- Penn Women Group
- PEO
- Presbyterian Group
- Red Cross Blood Drive
- Relay for Life
- Retired Military Officers
- Retired Physicians
- Sigma Chi Alumni
- Sonoran Astronomical Group
- Southwest Gardners
- Tattersallers
- TOPS
- Unitarian Group
- United Community Healthcare
- Vermont Club
Cash Gifts and Support to the Community
- La Posada Provides Direct Support to the Fire District
- La Posada Provides Support to Other Not-for-Profits in the Community
- La Posada Residents Provide Scholarship Opportunities to Employed Students for Continuing Education of their Choice
- La Posada Provides Transportation Services to Select Organizations for the Community Does Not Have Organized Transportation Services
Community Benefit Data Collection

- Employees Collect Data and Expense as a Benefit is Provided
- Data is Tracked and Aggregated by Year End Using Defined Expense Codes
- Data is Analyzed in First Quarter of Following Year for Inclusion for Reporting
Challenges to Not-For-Profit Status

Do’s:

1. Message Must Be Consistent and Communicated to all Constituents
2. The Concept of Providing a Community Benefit Must Be Pervasive From Top to Bottom of Organization
3. Format of the Ads or Communication Method Must Be Designed to Look Different that Standard Newspaper Ads. It’s not an Advertisement; It’s a Statement About Your Organization.
4. Impress Upon Local Leaders the Dollar for Dollar Benefit of Your Organization’s Direct Support in Terms of Cash and In-Kind Services
Don’t:

- Express a Total Dollar Benefit in Terms of Taxes

  - For Example, La Posada’s Tax Liability for:

    1. Property Taxes
    2. Sales Taxes
    3. Income Taxes

  - Can Be Calculated and is Likely to be a LARGE NUMBER. You wouldn’t want to invite challenges.
Be Creative and Spend the $$ To Get the Message Out!

It’s Worth The Effort!
Thank You!

Tim Carmichael, MBA, MS,CASP
Former VP-Marketing, La Posada
Now:
Director, Inspired Living Institute of La Posada
350 E. Morning Side Road
Green Valley, Arizona 85614
520-648-8234
tim@laposadagv.com
Questions & Discussion
“Holleran Social Accountability Toolkit:
An Implementation & Users Guide”

- Intent is to provide practical tools, worksheets, tips sheets, etc. rather than just on philosophical applications of Social Accountability.

- Release will be promoted to providers through a variety of mechanisms.
Questions?
Lisa Scott McCracken
lmccracken@holleranconsult.com

Timothy Carmichael
Tim@LaPosadaGV.com

LeadingAge Social Accountability Listserv
Cory Kallheim
ckallheim@LeadingAge.org

Holleran Social Accountability Toolkit
Ashley Greenawalt
agreenawalt@holleranconsult.com