

Social Accountability: Internal & External Messaging

Lisa Scott McCracken, Holleran

Tim Carmichael, La Posada

February 20, 2012

HOLLERAN
celebrating 20 years



Lisa Scott McCracken
President, Holleran

Purpose of Today's Webinar

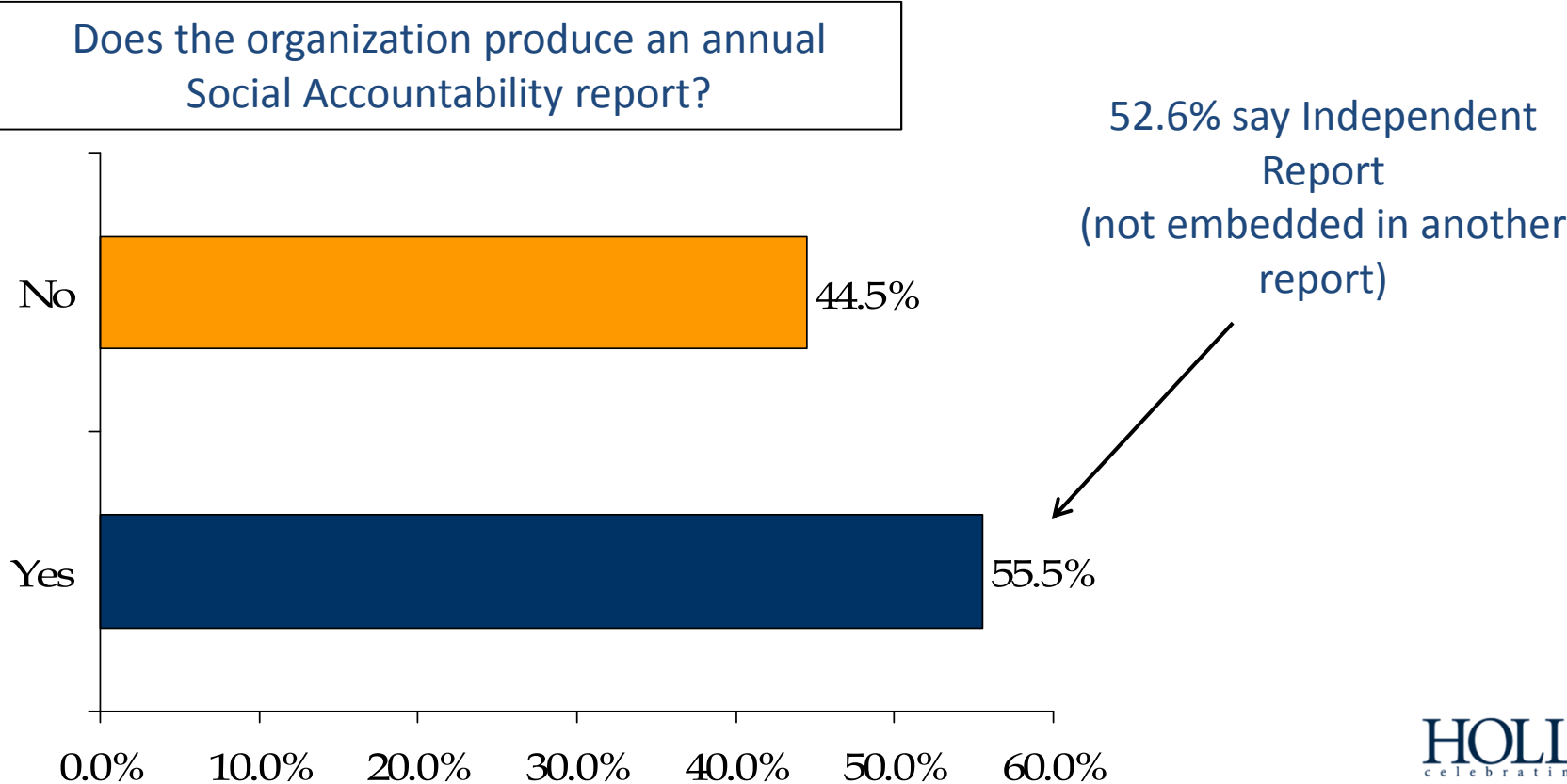
- To share with attendees the importance of messaging, both internally and externally, in an organization's Social Accountability Program.
- To provide tips and suggestions on effective communication strategies with respect to Social Accountability reporting.
- To hear from a provider about their messaging efforts and how they "Tell the Story" of their Social Accountability initiatives.

Importance of Internal & External

- 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:



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

Local Organizations

- Although a not-for-profit organization, the Masonic Village supports other local charitable groups, including Northwest Emergency Medical Services (NWEMS) and Elizabethtown and Rheems Fire Departments. In 2009, the Masonic Village donated its fifth and final payment of \$40,000 to NWEMS, part of its five-year pledge totaling \$200,000, which contributed to the purchase of a new ambulance. Maintenance staff also provided snow removal for NWEMS at no charge to help protect our community.
- In 2009, the Masonic Village contributed \$750 to the Urban League of Lancaster County. Through a USO Tribute Show featuring residents performances, staff, residents and visitors donated funds and two prayer shawls to the USO of Pennsylvania and Southern New Jersey.
- Masonic Village's food services department donates unused, prepared food weekly to the Elizabethtown Area Senior Center.
- The Masonic Village has pledged \$5,000 per year for the next two years to the American Association of Homes and Services for the Aging's Long-Term Care Solution Project, which educates legislators at state and local levels about issues of concern to seniors.
- In 2009, 1,357 people from the local community participated in Greater Elizabethtown Area Recreation & Community Services (GEARS) fitness programs held on the Masonic Village campus, thanks to a mutually beneficial agreement between GEARS and the Masonic Life Center (Masonic Village's on-campus wellness center).
- The Masonic Village donated furniture and medical supplies to others in need including two local families, Mount Joy Furniture Bank and House of Hope.

"I would like to thank you for the partnership with the Senior Center and taking the time each day to package the extra food. Seniors really enjoy the take-home foods each week. Your generosity is touching a lot of homes and is much appreciated. Some comments from seniors include: 'This was a blessing when I was too sick to get out to the store.' 'I am eating much healthier.' 'This is better than I can cook.'"

Joyce Hardman, Jen Kircher and Sherry Haneman, of the Elizabethtown Area Senior Center

Welcoming Others

The Masonic Village was pleased to offer the use of its facilities in 2009 to the following organizations, either free of charge or for minimal costs, for various meetings, programs and fundraisers:

- American Heart Association
- American Red Cross
- Bain Ridge Band
- Ballet Theater of Lancaster
- Central PA Symphony Orchestra
- Conoy Creek Watershed Association
- Department of Aging
- Elizabethtown Area Boy Scouts
- Elizabethtown Area Girl Scouts
- Elizabethtown Area School District
- Elizabethtown Chamber of Commerce
- Elizabethtown College
- Elizabethtown DeMolay
- Elizabethtown Job's Daughters
- Elizabethtown Twilight Trot
- GEARS
- Grand Chapter, Order of the Eastern Star
- Grand Lodge of New Jersey
- Kairos Health Systems
- Keystone Pets-Enhanced Therapy Services
- Knights of Pythias
- Masonic CHIP Program
- Northwest Emergency Medical Services
- Penn Dutch Pacers Walking Group
- Pennsylvania Department of Health
- Pennsylvania Office of Attorney General
- Prince Hall Grand Lodge
- Rainbow Girls
- Raven Studio Dance Recital
- Red Hat Ladies
- St. Paul's Church
- U.S. Census Bureau
- Voting Poll Place
- Willowood Swim Club

Did You Know...

- Among businesses in Adams, Cumberland, Dauphin, Lancaster, Lebanon, Perry and York counties, *Central Penn Business Journal* ranked Masonic Village as the #1 largest nursing home (based on number of licensed beds), #2 largest retirement community (based on number of living units) and #6 largest meeting facility (based on square footage of largest meeting room) in 2009?
- According to the American Association of Homes and Services for the Aging, Masonic Village at Elizabethtown ranked #10 on a list of the nation's largest non-profit senior living communities? The Masonic Villages, as a multi-site senior living organization, ranks #22 in the nation based on total living units?

4 • Masonic Village Report to the Community 2009 www.masonicvillagespa.org

2010 ABHOW Annual Report 15

CHARITABLE BENEFITS TO RESIDENTS AND TEAM MEMBERS - 2010

Medicaid Adjustments	59%
Direct Benevolence to Residents	9%
Resident Discounts	20%
Research & Education Benefits to Residents & Team Members	3%
Other Charitable Benefits to Residents & Team Members	9%

CHARITABLE BENEFITS TO THE BROADER COMMUNITY - 2010

Volunteer Service	60%
Community Health & Supportive Services	9%
Other Benefits to the Community at Large	11%
Use of Retirement Community By Outside Groups	16%
Community Benefit Operations Activities	1%
Community-Building & Leadership	3%

COMMUNITY BENEFITS PROVIDED AND RECEIVED

Year	Community Benefits Provided	Pure Charity Benefits Provided	Tax Benefits Received
2008	\$14,000,000	\$8,000,000	\$4,000,000
2009	\$15,000,000	\$9,000,000	\$4,000,000
2010	\$16,000,000	\$10,000,000	\$4,000,000

COMMUNITY SHARES BOUNTY WITH NEIGHBORS

Green thumbs and good souls are busy at Grand Lake Gardens in Oakland, Calif. In April of 2010, the community used a grant from Rebuilding Together Oakland to establish an organic garden. Since then, residents have been harvesting the produce – including potatoes, string beans, squash, cucumbers and carrots – and donating the bounty to a nearby food program for seniors.

Grand Lake Gardens initially planned to give the produce to the Alameda County Community Food Bank, says Carole Lee, the resident who leads the project. The first deliveries went to the food bank, but then the residents discovered that one of the food bank's clients, St. Mary's Center, was just three miles away and dedicated to serving seniors.

So Lee says, they decided to "skip the middleman." She and other residents harvest on Wednesday mornings, and the community's van driver helps deliver the food later the same day.

Sister Marilyn Madou, St. Mary's program director, says in 2009 the center served about 300 homeless seniors and about 600 seniors who have homes but need resources to help them age in place. The center also helps young children and families, but the midday hot meal served on Thursdays is just for seniors.

"We use the food they bring in for salads or as a vegetable medley," she says of Grand Lake Gardens' donations. "I'm very grateful for any kind of healthy food we can serve to the seniors, and fresh produce is high on that list."



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)



Shaping the Message

1. Follow “Leading Age’s” Annual Theme



The La Posada Story:

A Tale of Service to the Community – 2006

Prologue

In the beginning...In the land of Green Valley, the idea of La Posada was born (1983). Community leaders (TMC and Green Valley) believed that the people of Green Valley needed to have a wide continuum of care and services available so that as they aged and their needs changed, they would not have to leave the town and the friends they loved.

Chapter One

La Posada opened its doors (1987) to 100 independent living residents, and six months later, completed La Hacienda, its 60-bed nursing home. This would give Green Valley residents, as well as La Posada residents, a place to recover close to home or a place to live permanently that was close enough for spouses and friends to easily visit.

Chapter Two

By 1990, the Green Valley community greatly needed an assisted living program, which La Posada built with resident donations and assistance from Tucson Medical Center. This building made it possible for Green Valley residents, including La Posada residents, to get supportive care to delay or eliminate the need for extensive nursing home care.

Chapter Three

Through garden homes, rehabilitation services, expanded assisted living, a memory care program, and more apartments called La Perla, La Posada continued to grow to meet the housing and healthcare needs of primarily Green Valley community residents, giving them many more options not available previously.

Chapter Four

Through the years, La Posada's efforts to serve the larger community grew along with its size. Many of the things La Posada does today are through the generous attitude and community spirit of its 700+ residents, 490 employees, and dedicated volunteer Board of Trustees, all committed to the not-for-profit mission.

Chapter Five – Year 2006

Would the community miss La Posada if it did not exist? La Posada, with its solid financial base, uses its strength to improve the well being of the community at large.

- The youth of the area have been awarded 65 scholarships totaling \$36,000 to educate themselves and be better able to contribute to their communities.
- La Posada completed its \$500,000, 10-year pledge to the Green Valley Fire station.
- La Posada provided clinical and classroom space for the training of 44 CNAs to work in the Green Valley area.
- La Posada staff provided 2,590 hours in community leadership, valued at over \$146,000.
- La Posada rehab services helped 903 Green Valley residents better recover and stay independent. (88% were non-La Posada residents.)
- La Posada provided meaningful employment for over 450 individuals, winning a national award of excellence for its workplace practices.
- The \$10 million payroll (with an additional \$2 million for benefits) is considered to have a significant community economic impact.
- La Posada provides meeting room spaces and support for 39 community organizations.
- La Posada donated over 1,000 pounds of food to the Community Food Bank.

Chapter Six – Year 2006

As La Posada reaches its 20-year anniversary in May 2007, it looks forward to many more years of serving the Green Valley community as a partner, leader, or catalyzing support of the following organizations:

- AARP Tax Assistance
- Green Valley Lions Club
- AAUW
- Green Valley Naval Aviators
- ALPHA
- Green Valley Senior Games
- Arizona Association of Homes & Services for the Aging
- Kiwanis
- Arizona Department of Transportation
- League of Women Voters
- Alzheimer's Association
- Los Niños Del Valle
- British Teapot Club
- PEO
- Cactus Wren
- Red Cross
- Casa de Esperanza
- Retired Physicians
- Danish Club of Green Valley
- Rotary
- DAR
- Sabharita High School
- PICO
- Southern Arizona Trauma Network
- Friends of Extended Hours
- Sonoran Astronomical Society
- Green Valley Assistance Services
- Southwest Gardeners
- Green Valley Chamber of Commerce
- Tucson Adult Literacy
- Green Valley Community Foundation
- U of A College of Nursing
- Green Valley Fire District
- U of A Geriatric Education Center
- Green Valley Food Bank
- Valley Players
- Green Valley Health Fair
- Walk Across Arizona

Epilogue

La Posada's mission is to maximize the well-being and care of seniors.

Authors:

Sally Butbank
Sally Butbank, Board Chair

Lisa Israel
Lisa Israel, President & CEO

La Posada

Example of
Quarterly Full
Page Newspaper
Advertisement

2006 Leading Age
Theme was "Tell Your
Story."

La Posada

HOLLERAN
celebrating 20 years

Shaping the Message

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



2009 Social Accountability Report to the Green Valley Community

We Are Not-for-Profit

- We are governed by a local, volunteer Board of Trustees.
- We have no shareholders or stockholders.
- We were developed to meet the needs of the Green Valley community.
- Our excess revenues are used to promote our mission and stays in the community for the community.
- Our mission is "to maximize the well-being and care of the seniors."

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:
 - 600 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.

Alan 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 | Green Valley Naval Aviators |
| AAUW | Green Valley News |
| Aging Services of Arizona | Green Valley Organ Players Club |
| ALOHIA | Green Valley Rotary |
| Alpha Xi Delta | Green Valley Shriners |
| Sonora Desert Scribes | GV Flyers |
| Alzheimer's Family Support | Illini Club |
| Art Critique Group | Kiwanis |
| Artist 13 | La Canoa Lions Club |
| AZ Dept. of Public Safety | League of Women Voters |
| Cactus Wren | Life After Loss Support Group |
| Casa de Esperanza | Network of Caring |
| Catholic Daughters | Penn Women Group |
| Chamber of Commerce | PFO |
| U of A Data Collection | Presbyterian Group |
| Chi Omega | Red Cross Blood Drive |
| Compassion in Choices | Relay for Life |
| Continental School | Retired Military Officers |
| Covenant Group | Retired Physicians |
| Cron's Circle | Sigma Chi Alumni |
| Danish Club | Sonoran Astronomical Group |
| DAR | Southwest Gardeners |
| Democratic Women's Group | Tattersall's |
| Desert Gardeners | TOPS |
| Direct Caregivers Association | Unitarian Group |
| FICO | United Community Healthcare |
| Friends of Madera Canyon | Vermont Club |
| Green Valley Chamber of Commerce | |
| Green Valley Desert Gardeners | |



2009 Community Benefit Ad

Note: Partnerships and Quantifiable Dollars and Time



350 E. Morningside Rd., Green Valley, AZ 85614



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- Our **excess revenues** are used to **promote our mission and stays in the community for the community.**
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- 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.
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- La Posada staff provided 2,892 hours in **community leadership**, valued at \$136,695.
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Lisa H. Israel
La Posada President & CEO

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AAUW	Green Valley News
Aging Services of Arizona	Green Valley Organ Players Club
ALOHA	Green Valley Rotary
Alpha Xi Delta	Green Valley Shriners
Sonora Desert Scribes	GV Flyers
Alzheimer's Family Support	Illini Club
Art Critique Group	Kiwanis
Artist 13	La Canoa Lions Club
AZ Dept. of Public Safety	League of Women Voters
Cactus Wren	Life After Loss Support Group
Casa de Esperanza	Network of Caring
Catholic Daughters	Penn Women Group
Chamber of Commerce	PEO
U of A Data Collection	Presbyterian Group
Chi Omega	Red Cross Blood Drive
Compassion in Choices	Relay for Life
Continental School	Retired Military Officers
Covenant Group	Retired Physicians
Cron's Circle	Sigma Chi Alumni
Danish Club	Sonoran Astronomical Group
DAR	Southwest Gardeners
Democratic Women's Group	Tattersallers
Desert Gardeners	TOPS
Direct Caregivers Association	Unitarian Group
FICO	United Community Healthcare
Friends of Madera Canyon	Vermont Club
Green Valley Chamber of Commerce	
Green Valley Desert Gardeners	



La Posada 2009 Community Benefit Ad

Why we are
Accountable,
Person's Served,
List of Partnerships
Quantifiable Support



Message Can Also Include

- 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 than 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



Challenges For Not-for-Profits

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.



La Posada's Annual Community Benefit Statement



Our mission is to maximize the well being and care of seniors.

La Posada has completed its 20th year of serving the Green Valley community, and we believe that our board, our local focus, our professional expertise, and our commitment to the well being of seniors has made a difference.

La Posada's Board of Trustees, residents, and staff take pride in our involvement, partnership, and leadership with others in service to the entire community.

We are a not-for-profit and believe in:

- Dignity for all people at every stage of life;
- Services that people need, when they need them, in a place they call home;
- Quality that people can trust; and
- Advocacy for the right public policy for the right reason and for those in need.

Values We Live By:

- We care for each other with respect and dignity
- We have a passion to exceed expectations
- Trust us to do the right thing – honestly and respectfully
- We work as a team, with creativity and purpose
- Meaningful employment with consideration for personal well being
- What's good for the community is good for us

We are a major employer, providing meaningful employment and educational opportunities for 500 people

Payroll + Benefits = \$14,835,000 (This results in a significant economic impact, as close to 70% of our employees live in and around Green Valley)

In 2007, we directly served 2,167 seniors through our campus programs – more than 50% of these on a daily basis.

La Posada thanks Green Valley and the surrounding communities for their support, and looks forward to meeting the needs of the future in ways that will enhance the lives of many.

Dr. Palmer Evans, Chair
La Posada Board of Trustees

Lisa Israel
President & CEO



We collaborate and partner with others for the greater good; We help others serve seniors...

AARP
AAUW
Alpha Phi
Alpha Rho
Alpha Delta
Artist 13
Beta Sigma Phi
British Women Teapot Club
Cactus Wren
Cancer Research
Casa de Esperanza
Chamber of Commerce
Chi Omega
CNA Classes
Compassionate Life Choices
Continental Family Medical Ctr.
Danish Club
DAR
Desert Gardeners
Desert Hill Church
Desert Scribes
FATSO
FIGO
Friends of Madera Canyon
Green Valley Water
Green Valley Hearing Loss
GV Community Foundation
GV Naval Aviators
Green Valley News
GV Hiking Club
Illini Club
Kappa Alpha Beta
Kappa Kappa Gamma
Kiwans
La Canea Lions
League of Women Voters
Network of Caring
OLLIE
PEO
PEO BO
PEO CA
PEO CI
PEO CR
PEO DI
PEO Palo Verde
PEO Reciprocity
Phi Delta Theta
Pima County Mature Worker
Pima County Transportation
Presbyterian Women
Red Cross
Retired Military Officers
Retired Physicians
Rotary
Sigma Chi Alum
Sonoran Astronomical Society
Southwest Gardeners
St. Francis Episcopal
Tattersols
Tops
Unitarians
United Community Health
Vermont Club
Weight Watchers

Over 60 organizations used La Posada facilities free of charge in 2007.

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



Coming Soon...

“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.

Contact Information & Resources

Questions?

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LeadingAge Social Accountability Listserv

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Holleran Social Accountability Toolkit

Ashley Greenawalt

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