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“Social Accountability and Community Engagement: CCRC National Study Results & Recommended Practices”

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Presented By:



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Holleran**



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Leading Age**

Purpose of Today's Webinar

- To stimulate discussion regarding Social Accountability and its importance among LeadingAge members.
- To review the results of the LeadingAge-Holleran National CCRC study of Social Accountability.
- To discuss and identify ways to better educate members about Social Accountability and to share best practices among peer organizations.



The LeadingAge Perspective



LeadingAge[™]
formerly aahsa



- Social
Accountability

- Leadership Imperative



- Strengthen Not-For-Profit Leadership





• Change Lives – Tell Your Story



CCRC Social Accountability Study

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Study Rationale

- Learning process and tool for educating members and furthering the field
- Many do great things for their community, but could improve the “telling of their story”
- Survey developed by Holleran and Lyon Software with peer review from LeadingAge and several CCRC providers throughout the country
- Content largely driven by existing standards as to “what counts” and “what doesn’t count” according to the IRS
- Holleran utilized expertise and knowledge, as well as Catholic Health’s Association's “Evaluating Community Benefit Programs, Appendix D” and Quality First components

Study Objectives

1. To gather statistics on how not-for-profit (NFP) continuing care retirement communities (CCRCs) are recording and tracking their social accountability activities.
2. To provide statistics that will allow providers to benchmark their activities/figures with peers.
3. To demonstrate how NFP CCRCs are serving their communities and use this information in communications with outside organizations (governing bodies and elected officials).
4. Utilize information to set future performance goals.

Social Accountability Study

- Online survey
 - Email blasts
 - LeadingAge this Week and CCRC Listserv
 - Telephone interviews to supplement
- CCRC target
 - Of the 1,861 CCRCs 82% are NFP (according to “Ziegler National CCRC Listing and Profile”)
 - Seeing most significant activity and challenges to their tax-exempt status
 - May expand in the future

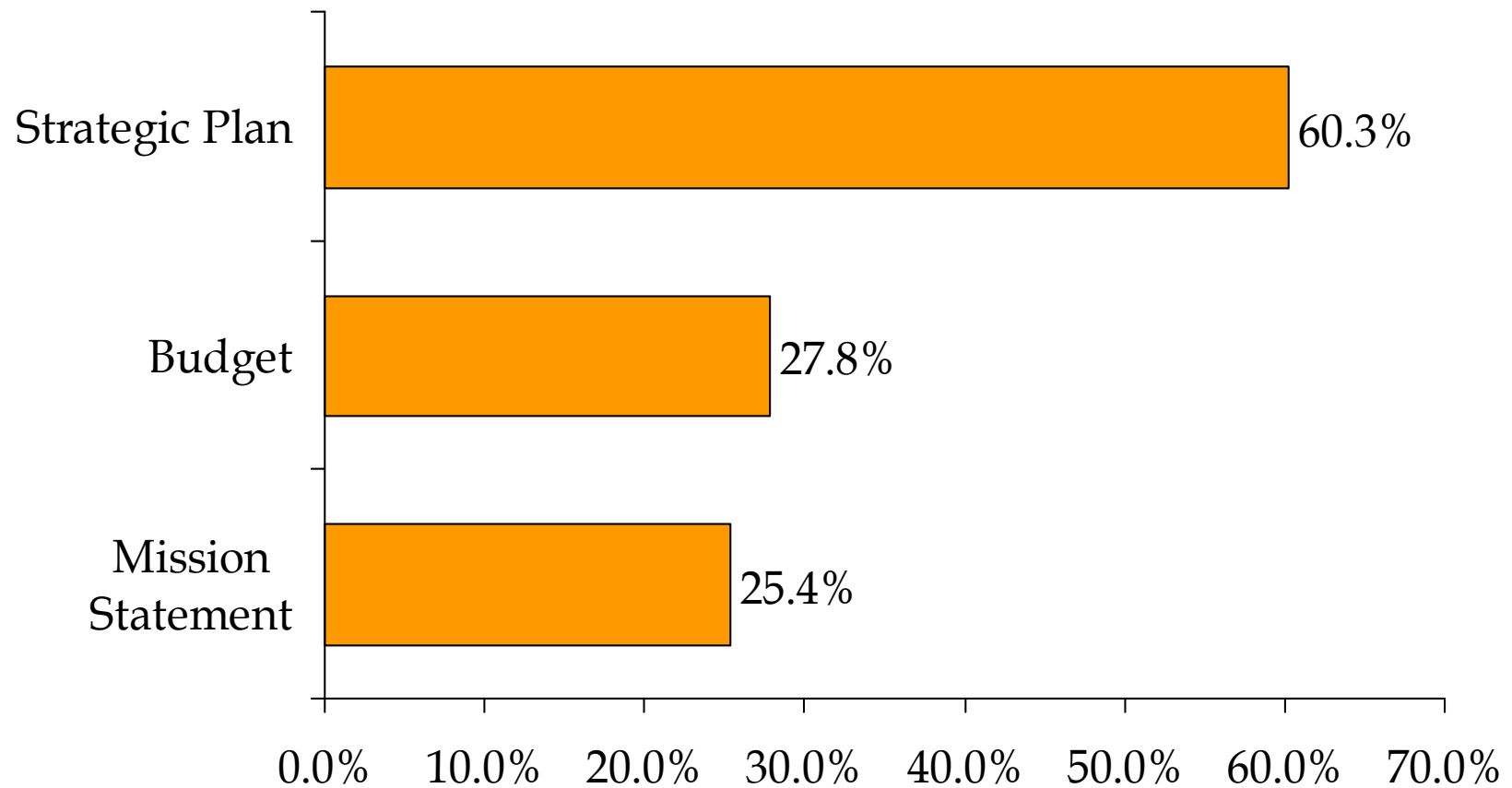
Interpreting the Results

- Results are preliminary (full report to be released soon by Holleran and LeadingAge).
- The results simply reflect a sample of 200+ CCRCs and may not be representative of all CCRC organizations.
- Results should be used for directional and educational purposes.



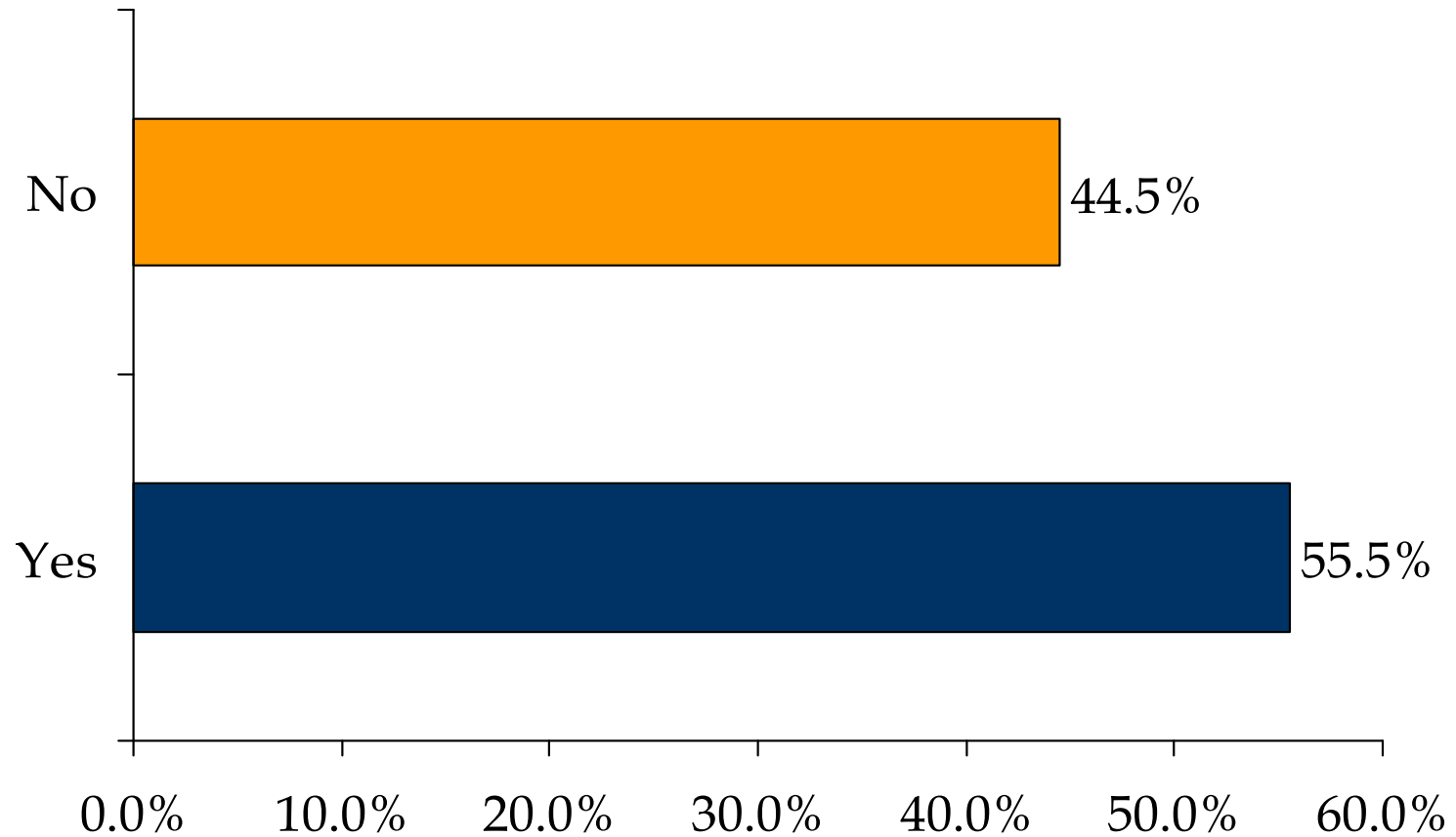
The Results

Percentage of CCRCs with Specific Reference to Social Accountability in...



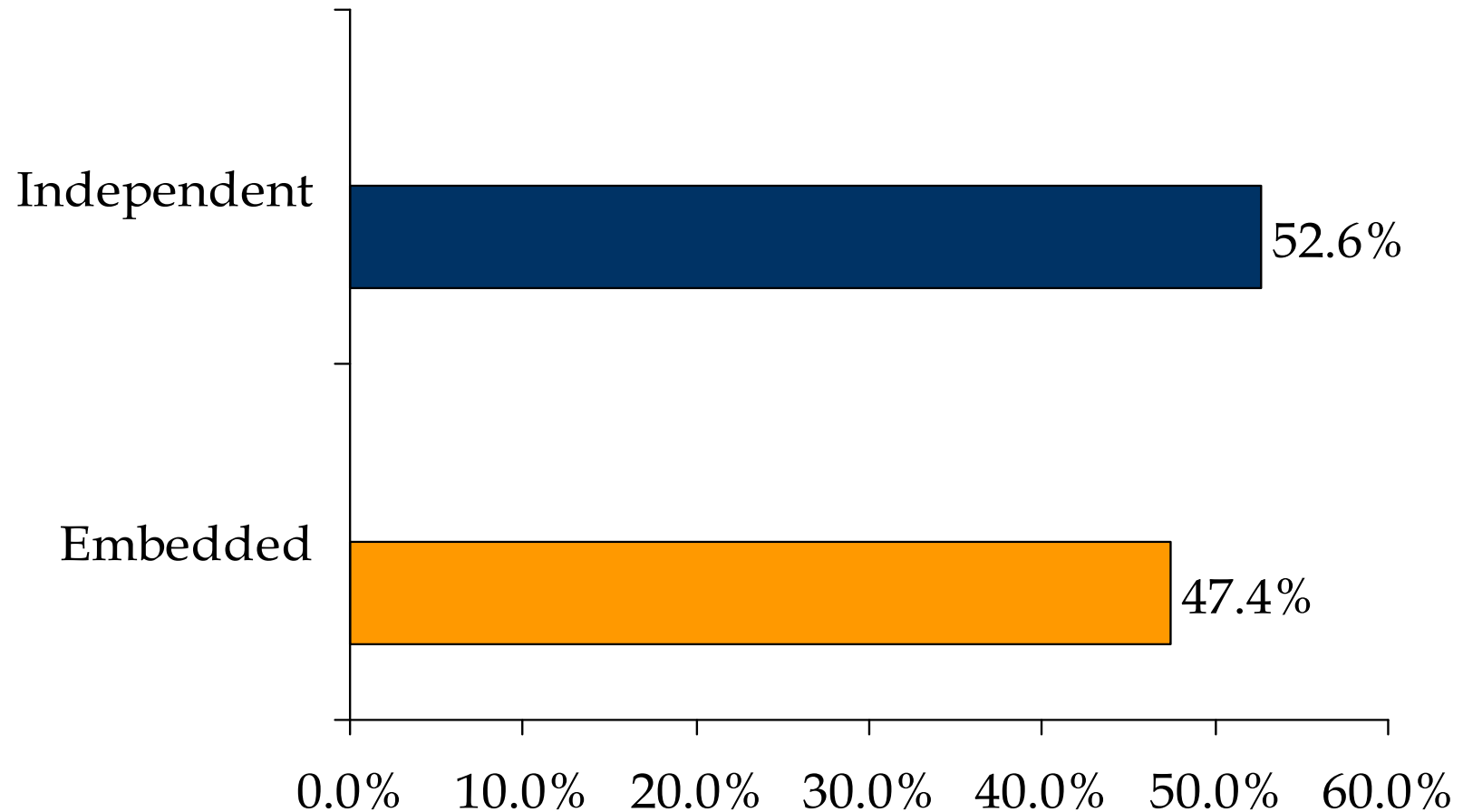
N = 151

Does the organization produce an annual Social Accountability report?



N = 146

If yes, is report embedded or is it independent?



N = 81

Social Accountability Report

- Not just a list of what you've done, tell story with statistics embedded

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.



Members of the United Way of Lancaster County's Success by 6 community engagement team meet at Masonic Village to discuss local, state and federal advocacy for children.

"We 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.'"



James Hardman and Lloyd Hemperly Jr. of the Elizabethtown Area Senior Center, pick up food from Masonic Village for seniors.

Did You Know...

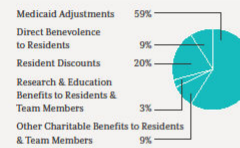
1. Among businesses in Adams, Cumberland, Dauphin, Lancaster, Lebanon, Perry and York counties, *Central Penn Business Journal* ranked Masonic Village as the #1 largest nursing home (based on number of licensed beds), #2 largest retirement community (based on number of living units) and #6 largest meeting facility (based on square footage of largest meeting room) in 2009.
2. 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?

Welcoming Others

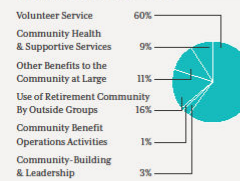
The Masonic Village was pleased to offer the use of its facilities in 2009 to the following organizations, either free of charge or for minimal costs for various meetings, programs and fundraisers:

- American Heart Association
- American Red Cross
- Bainbridge 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
- Kalros Health Systems
- Keystone Pets-Enhanced Therapy Services
- Knights of Pythagoras
- Masonic CHFP 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
- Yelling Pool Place
- Willowood Swim Club

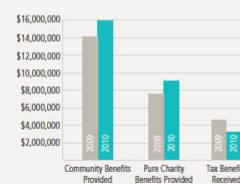
CHARITABLE BENEFITS TO RESIDENTS AND TEAM MEMBERS - 2010



CHARITABLE BENEFITS TO THE BROADER COMMUNITY - 2010



COMMUNITY BENEFITS PROVIDED AND RECEIVED



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.

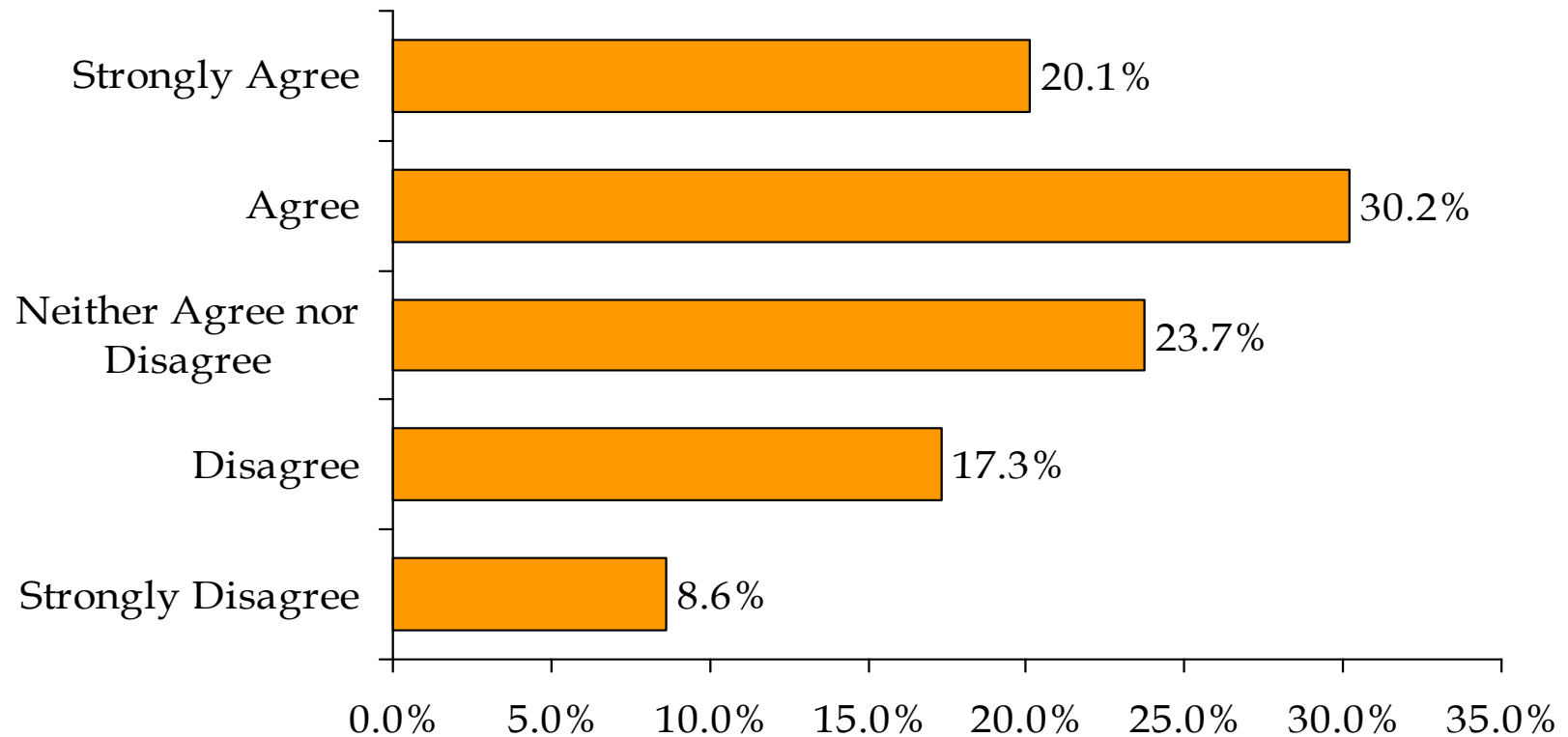
Sa Lee says, they decided to "skip the middleman." She and other residents harvest on Wednesday mornings, and the community's van driver helps her deliver the food later the same day.

Sister Marilyn Medaw, 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."

Social Accountability Culture

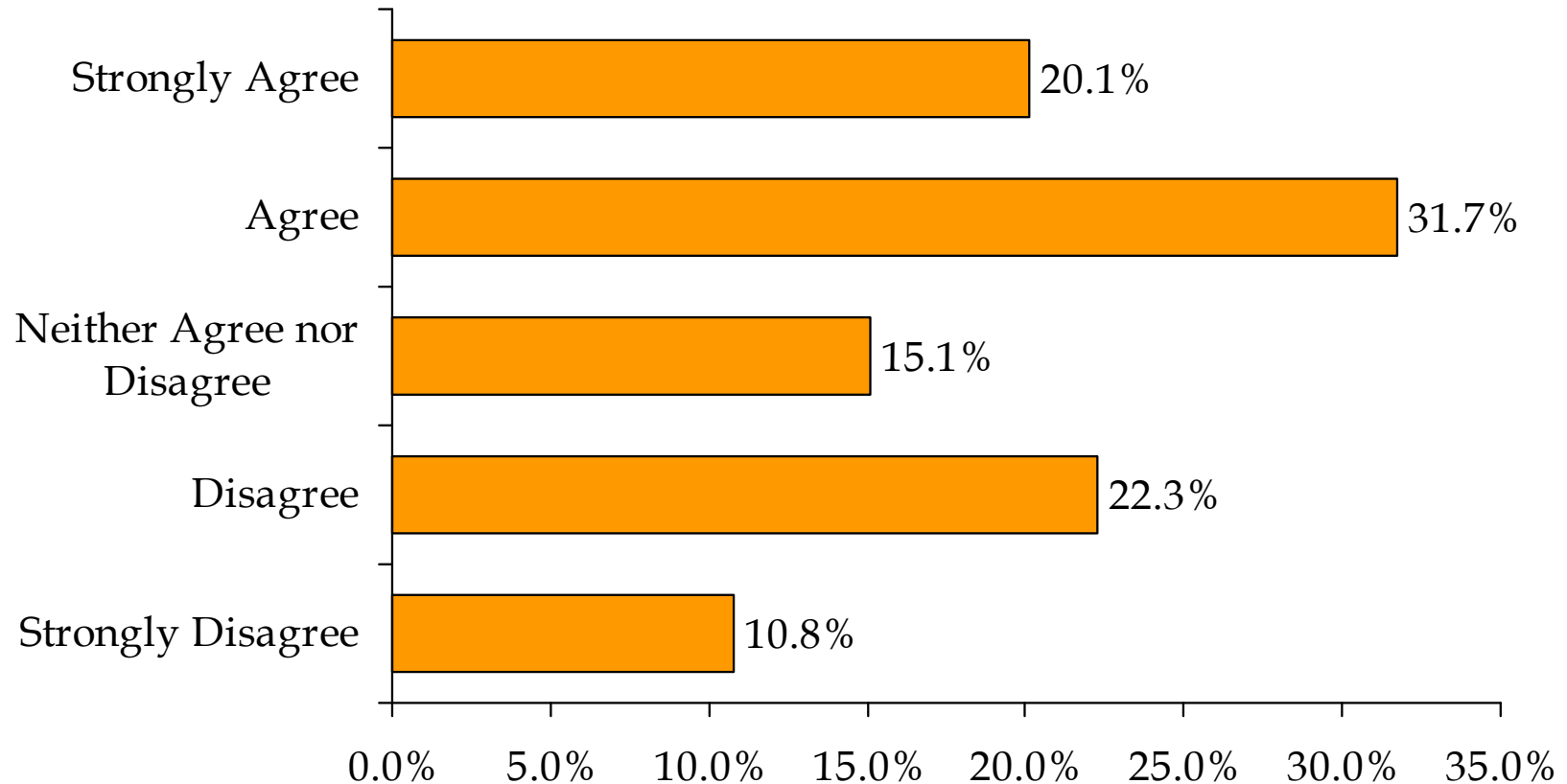
The Board of Trustees discusses the Organization's Social Accountability Goals



N = 139

Social Accountability Culture

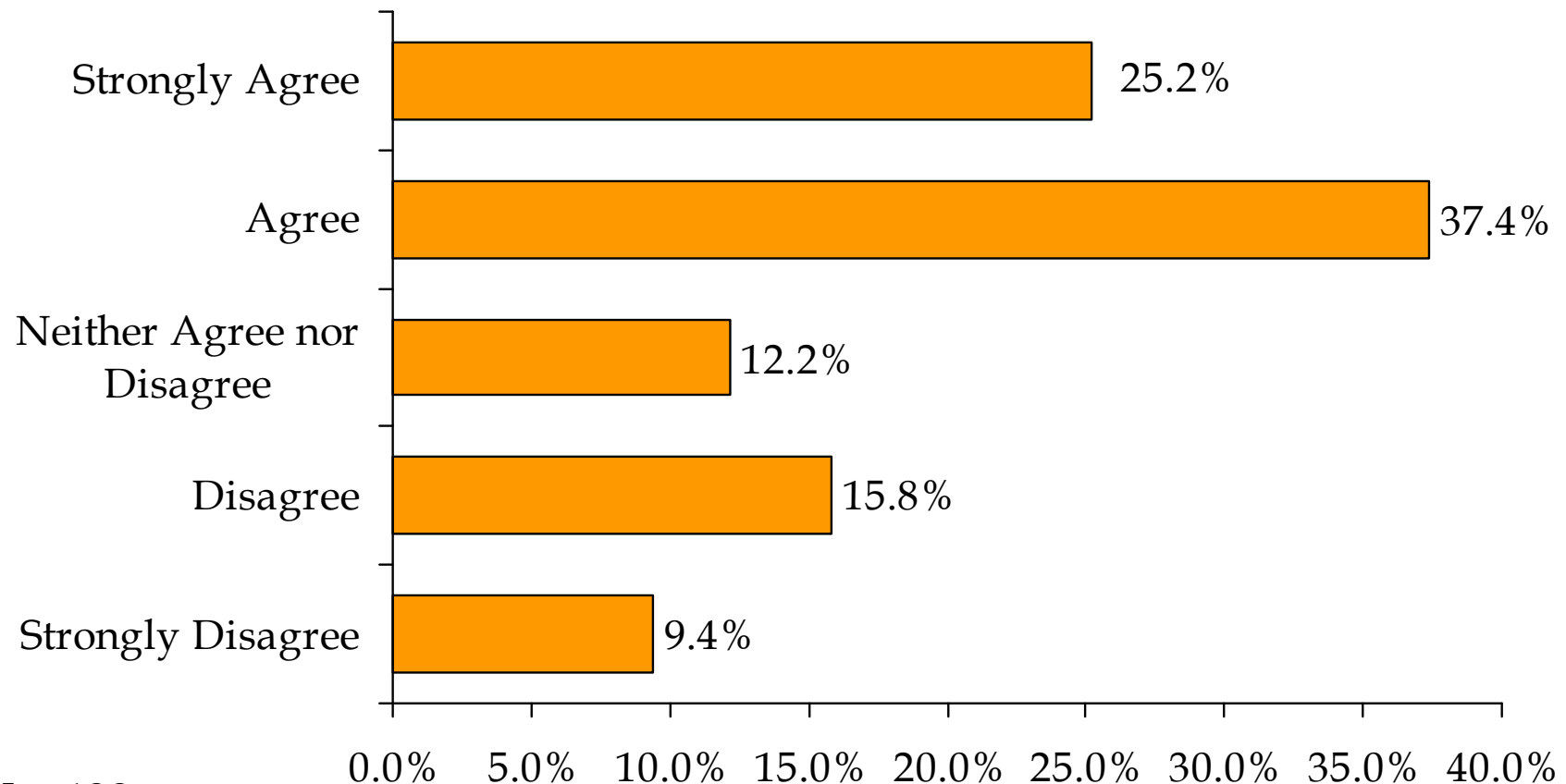
The organization has at least one clearly designated individual who is directly responsible for Social Accountability performance.



N = 139

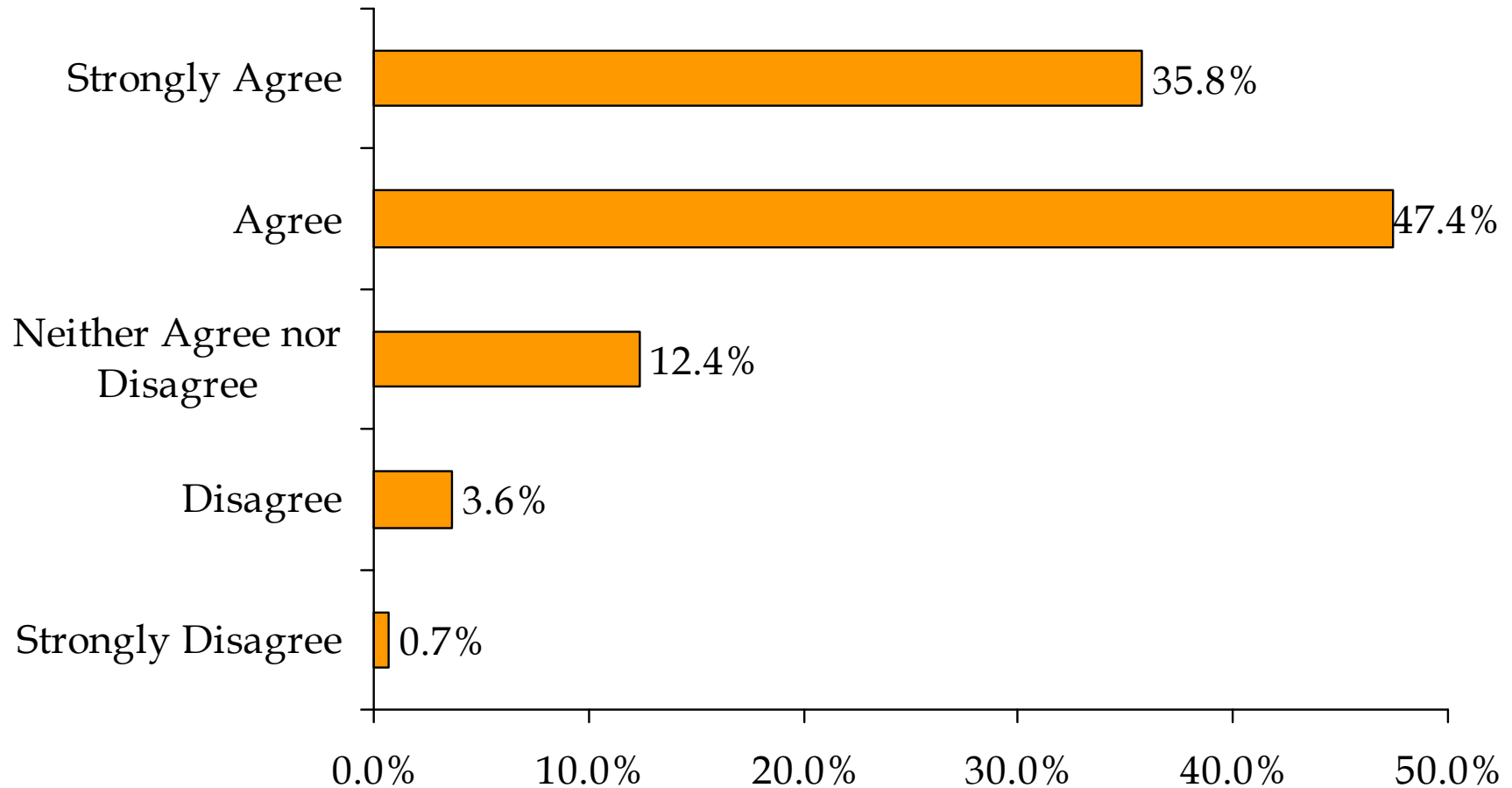
Social Accountability Culture

Residents, Staff and other key stakeholders have been informed of the Social Accountability program.



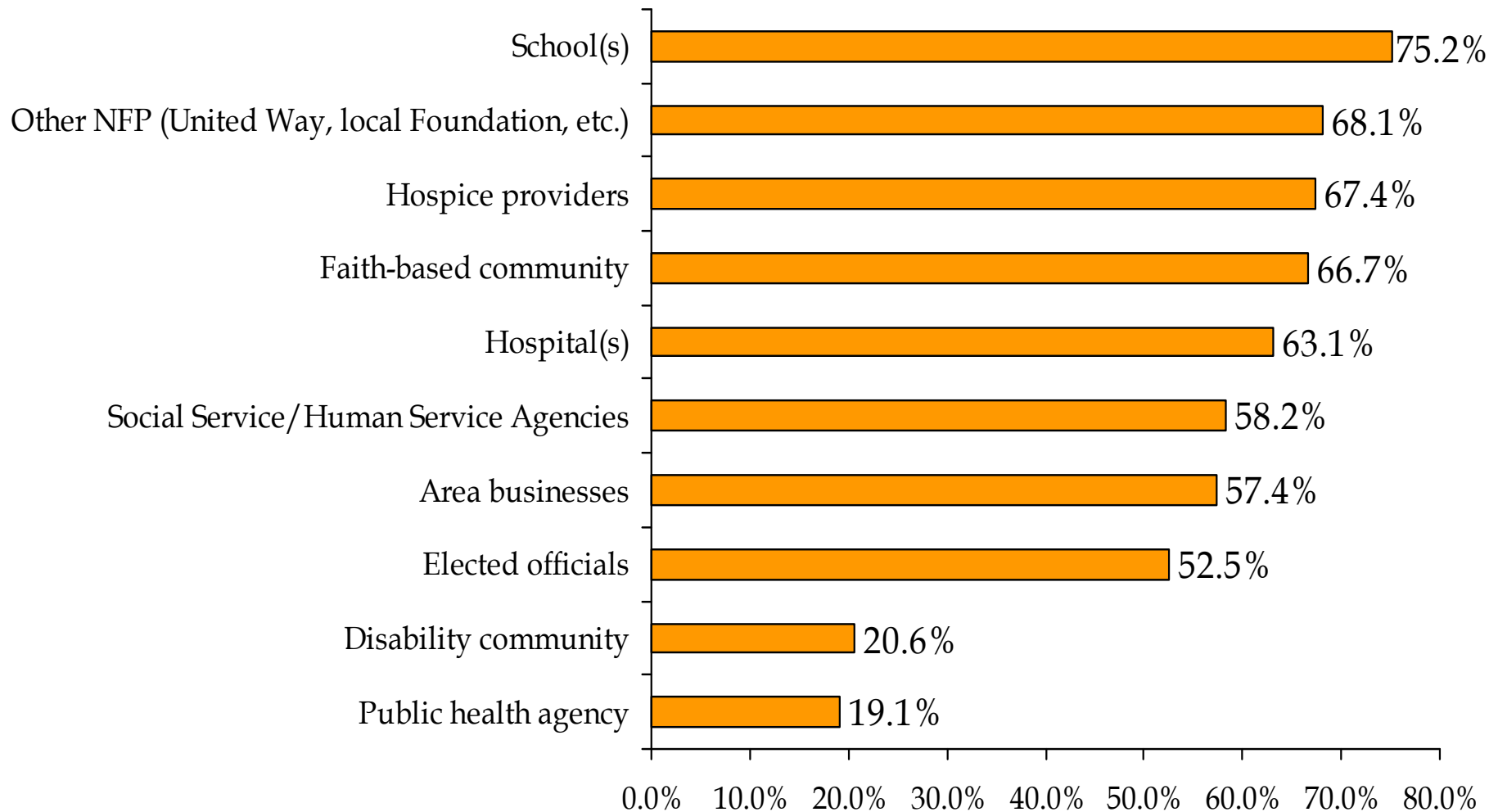
N = 139

The organization has successful community partnerships in place



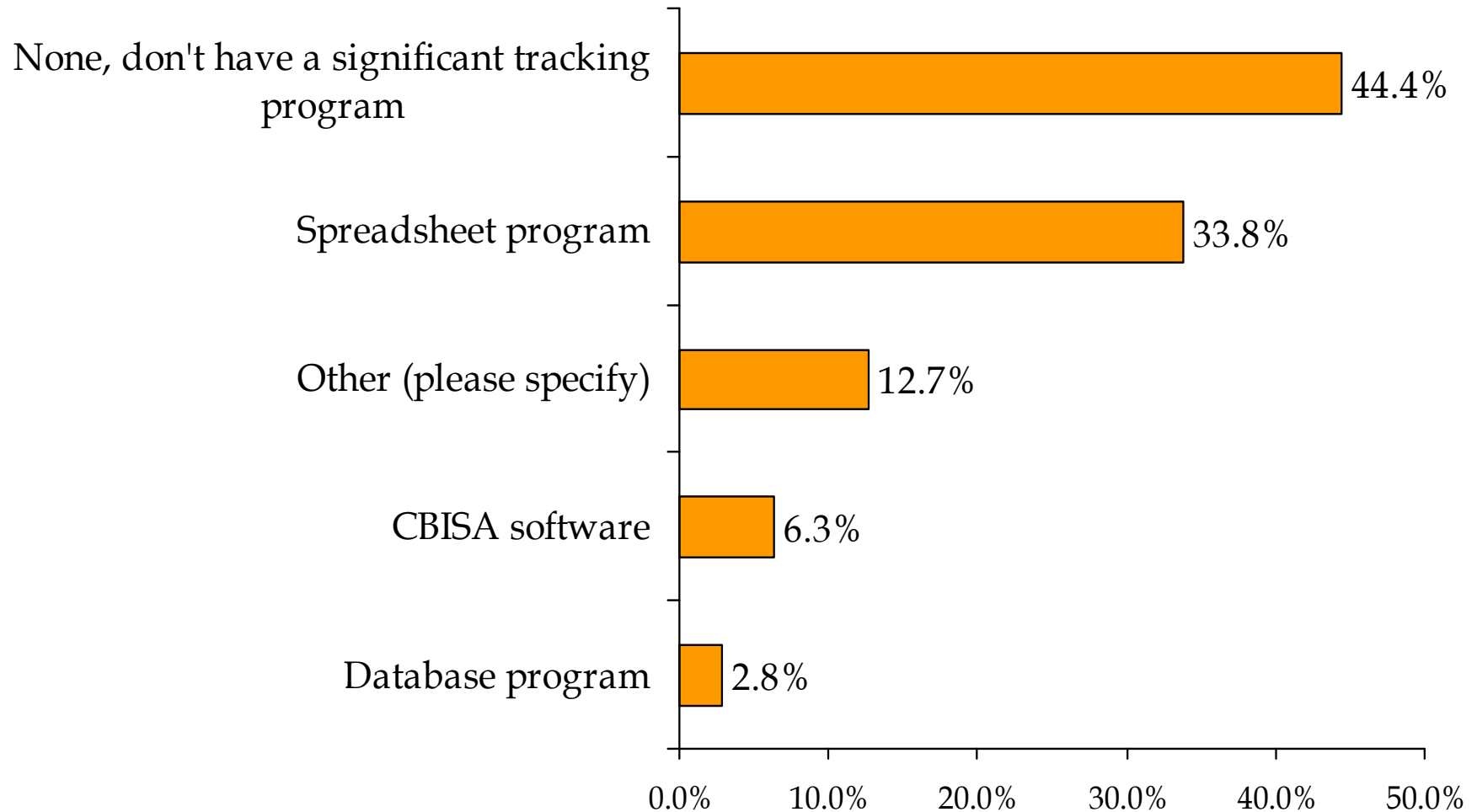
N = 137

Who are considered engaged “community partners”?



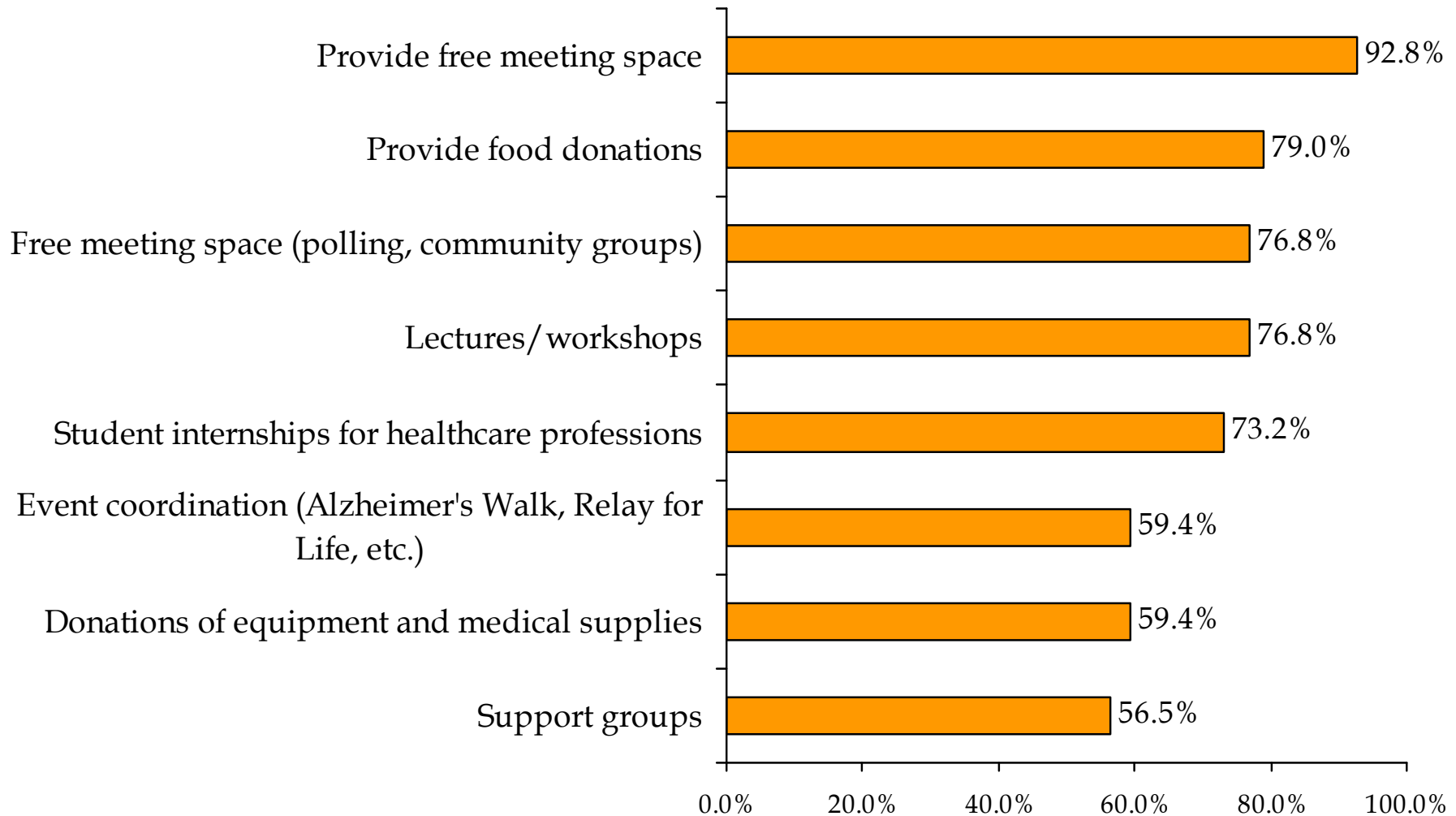
N = 141

What tool do you use to collect your social accountability statistics?



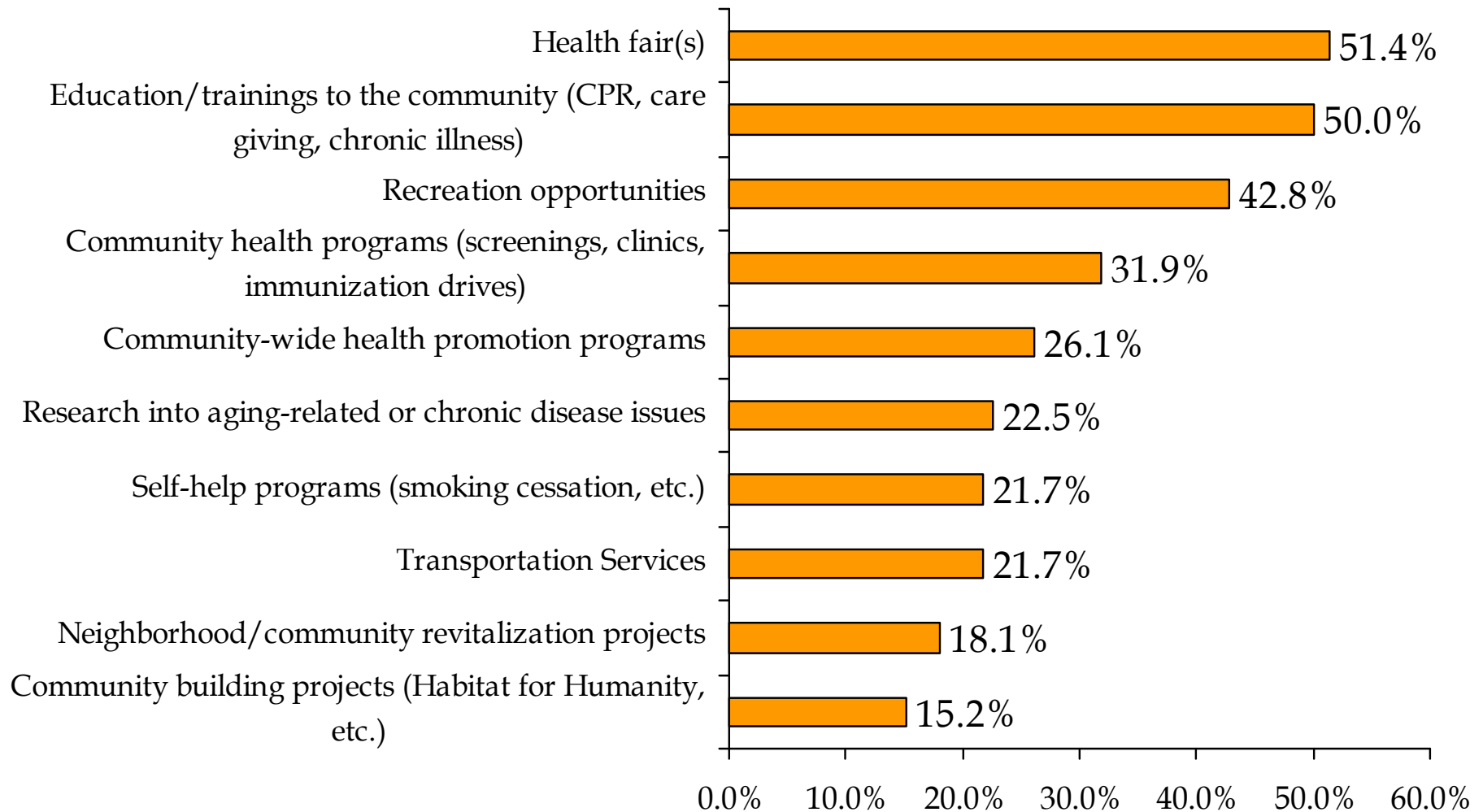
N = 142

Activities provided for free in the past year



N = 138

Activities provided for free in the past year (cont'd)



N = 138



Moving Forward

Holleran Webinar Series

- Holleran is committed to furthering the discussion and education around Social Accountability.
- Additional webinars will be offered throughout 2011-2012.
 - Ensuring a Culture of Social Accountability (11/16/11)
 - Engaging Community Partners
 - Board Discussion and Budgeting for Social Accountability
 - Tracking
 - Communication
- What do you want to hear about?
 - Please take the time to complete the post-webinar survey

LeadingAge Commitment

- Updated section on the LeadingAge website for ongoing communications, resources, and toolkits
- Commitment by the Board and Staff to continue to emphasize the importance of Social Accountability to LeadingAge members
- Sessions at the annual meeting devoted to Social Accountability (*Julie Trocchio, Catholic Health Association; Trina Hackensmith, Lyon*)

Access to the Full Report

- The full report of the CCRC Social Accountability Study can be found at:
 - Holleran website (www.holleranconsult.com)
 - LeadingAge website (http://www.leadingage.org/Social_Accountability.aspx)
- Copies will also be made available via Holleran's booth at the LeadingAge conference (Booth # 2129)
- Webinar registrants will also receive an email of the full report



Questions & Discussion

Contact Information

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