

# Tracking Social Accountability Initiatives

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*January 10, 2012*





# Jocelyn Martin Holleran

# Purpose of Today's Webinar

- Continue the ongoing discussion regarding Social Accountability and its role among LeadingAge members
- Discuss the importance of tracking Social Accountability
- Hear first-hand accounts of how two providers are developing their tracking system
  - What activities they report
  - Determining financial valuations
  - Manpower needed



# Trina Hackensmith

## Lyon Software



# Why do we track Social Accountability?

## *Meeting the tax exempt mandate...*

IRS Revenue Ruling 72-124 calls for the organization to satisfy three primary needs of older people: housing, health care, and financial assistance.

## *But Social Accountability is so much more...*

Responding to community needs and not being reimbursed

Going “outside your residential community” to meet needs

Going “above and beyond” when serving low-income residents

Having low-income staff and community members participate in programs

# Why do we track Social Accountability?

- Public Awareness Reasons  
*....Showing accountability to your community*
- Tax Exemption Reasons  
*....Preserving tax exempt status*
- Sponsoring Reasons  
*....Walking the walk, not just talking the talk*
- Management Reasons  
*....Response to external challenges*

*Mission-based organizations often started as a response to community need.*

# How to Track, Collect, and Report

## Put an Organization-wide Program in Place

- Volume of data: can it be handled manually?
- Variety of data: how can you keep track?
- Verified data: does it give an accurate picture?

# How to Track, Collect, and Report

## Put an Organization-wide Program in Place

- Collection of data becomes systematic and structured
  - ✓ part of what your staff routinely collects
  - ✓ provides the framework for tracking and reporting

*move from concept to reality*

- Incentive for staff to “think” about Social Accountability
  - ✓ Increased awareness
  - ✓ Increased excitement

*move from knowledge to practice*

# How to Track, Collect, and Report

## Put an Organization-wide Program in Place

- Collecting and maintaining statistics
  - ✓ Proves you are a legitimate “charitable” organization
  - ✓ Provides useful information for budgeting
  - ✓ Puts policies in place (lessons learned from Schedule H)

*move from insecurity to confidence*

- Impacts and Outcomes
  - ✓ Are we making a difference?
  - ✓ Is our money well spent?

*move from average to effective*

# Telling Your Story

## ...through statistical summaries

- ✓ Attach to form 990
- ✓ Include in annual Social Accountability reports
- ✓ Used in tracking and managing these programs/services

## ...through narratives

- ✓ Anecdotes, stories, narratives
- ✓ Telling “the rest of the story”

## ...through outcomes and evaluations

- ✓ Are we making a difference?
- ✓ How great is our impact?



**David A. Grant**  
**American Baptist Homes of the West**



# Definition of Social Accountability

Social Accountability  
is a measure of  
ABHOW's commitment  
to its mission and purposes.



# Goals of Social Accountability

- Proactively demonstrates the importance of serving the broader community;
- Serves the needs of our own residents;
- Helps to protect and preserve ABHOW's exempt status;
- Builds social capital while erecting a brick wall of insulation for ABHOW.



# Goals of Social Accountability



- As each brick in the wall is collected, ABHOW assigns a financial number to that brick.
- When all the bricks are in place, the wall is strong and a grand total is available evidencing ABHOW's commitment to community.

- Annually, ABHOW documents its Social Accountability;
- Community executive directors and administrators keep records of charitable care and community service programs using:
  - ✓ ABHOW's Summary of Community Services
  - ✓ ABHOW's Guidelines for Reporting Charitable Benefits
- This information is then reported to the ABHOW corporate compliance officer and an annual Social Accountability Report is prepared and distributed.



# Valuing Social Accountability

## Tax Benefits Received vs. Community Benefits Provided

Taxes Due if Not an Exempt Organization      Community Benefits Provided

Real Estate Taxes	\$_____	\$_____	Benevolence
Personal Property Taxes	\$_____	\$_____	Uncompensated Care
Federal Income Taxes	\$_____	\$_____	Pure Charity
State Income Taxes	\$_____	\$_____	Volunteer Time
Tax-Exempt Bonds	\$_____	\$_____	Other
<b>Total</b>	<b>\$_____</b>	<b>\$_____</b>	<b>Total</b>





**Kathy Pollicita**

**Frasier Meadows Retirement Community**

**FRASIER MEADOWS**  
RETIREMENT COMMUNITY

**HOLLERAN**  
celebrating 20 years

# Frasier Meadows Retirement Community

- Single Site -CCRC – in Colorado
- 400 + residents
  - ✓ 260 Independent
  - ✓ 35 Assisted Living
  - ✓ 108 Health Care Center
- 300 + Staff
- My role – Director of Charitable Giving and Community Outreach
- Charitable Giving and Community Outreach Committee of the Board

# 50+ Ideas for our Senior Services Social Accountability Program

Name	Department
Yes, doing	Like to do
1	Offer health screenings for members of the community
2	Allow community groups to use space in the facility at no charge for meetings, special events, etc
3	Fund raise for United Way
4	Offer Meals on Wheels
5	Become a member of your Chamber of Commerce Economic Development Committee
6	Participate in Memory Walks
7	Participate in Local Bike A-Thons
8	Offer Wellness Programs for the Community
9	Sponsor community transportation
10	Open an elder abuse/respite shelter
11	Offer public awareness for voters
12	Become a battered women's shelter
13	Donate clothing to those in need
14	Help fire department build new fire house
15	Encourage residents as volunteers in other organizations
16	Host a community radio station
17	Encourage residents to knit for those in need
18	Offer low-income daycare
19	Host a health conference
20	Begin a staff/resident-supported social accountability fund to help fund new programs/services in the community
21	Offer training institute for staff
22	Develop care team program with churches to serve homebound and respite needs
23	Host local community college classes

# Resident Volunteer Activities Survey

**Frasier Meadows Retirement Community  
Resident Volunteer Activities Survey**

Name (Optional) \_\_\_\_\_

Please make a check by the name of the group(s) you volunteer with and write down the number of hours you spend, noting if the hours are for a **week, month, or year**. Please return to the box at the Front Desk by November 18, 2011. Thank you for your time!

NAME OF GROUP	HOURS YOU SPEND	TYPE OF WORK	DESCRIPTION
	NOTE-PER WEEK, MONTH OR YEAR		
Alzheimer's Association			
American Cancer Society			
American Red Cross			
Boulder Community Hospital			
Boulder County Humane Society			
Boulder County Senior Law Day			
Boulder Homeless Shelter			
Boulder Museum of Contemporary Art			
Boulder Public Library			
Boulder Rotary			
Boulder Valley School District			
Boy Scouts of America			
Church Groups			
Colorado Music Festival			
Community Food Share			
EcoCycle			
Emergency Family Assistance			
Family Learning Center			
<b>Frasier Meadows Retirement Community</b>			
HospiceCare of Boulder and Broomfield Co.			
Girl Scouts of America			
Habitat for Humanity			
Imagine!			
NAME OF ORGANIZATION	HOURS SPENT NOTE: Weekly, Monthly, Yearly	TYPE of WORK - DESCRIPTION	
I Have A Dream Foundation			
Kiwanis Club			
League of Women Voters			

# Frasier Community Services Action Plan

1. **Briefly describe program** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. **What is the target population?** \_\_\_\_\_
3. **How many persons are expected to be served?** \_\_\_\_\_  
*(Use different unit of service if more applicable)* \_\_\_\_\_
4. **Expected outcome?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. **Expected schedule**  
    Planning period (give dates) \_\_\_\_\_  
    Implementation date(s) \_\_\_\_\_  
    Completion dates (if applicable) \_\_\_\_\_  
    Report to governing body by \_\_\_\_\_  
    Report service by \_\_\_\_\_
6. **Plan for measuring progress and outcomes** \_\_\_\_\_  
\_\_\_\_\_
7. **Staffing**  
    Physician hours \_\_\_\_\_  
    Volunteer hours \_\_\_\_\_
8. **Financing**  
    Expected Costs \_\_\_\_\_  
    Sources of revenue \_\_\_\_\_  
    Expected amounts \_\_\_\_\_  
    Total expected reimbursement/payments \_\_\_\_\_  
    Expected shortfall/surplus \_\_\_\_\_

# Frasier Social Accountability Program Form 2012

**Department**

\_\_\_\_\_

*Please use one (1) form for each program offered*

- 1. Title of service/program
- 2. Contact person for program
- 3. Category of programs  
(See List\* Below)
- 4. Brief description of program:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Who is served by the program and how do they benefit from it?*

- 5. Number of persons served:
- 6. Value of contribution

A. Staff involved:	Total hours x average hourly salary =
B. Value of goods/services donated by the facility	Supplies
	Purchased services
Sub-total goods/services donated by the facility =	
C. Less funding received (grants, registration, fees, etc.)	
<b>Total value (A + B - C)</b>	

- A. **Direct Services:** Free or discounted services; contributions of cash, equipment/supplies or staff time. Community education/Health screenings (Does NOT include Charity Care/Medicaid)
- B. **Indirect Support:** includes money, supplies and equipment (e.g. space) donated to other providers who deliver services to the community
- C. **Education (health professionals/internships, etc.)**
- D. **Other (specify)**

**NOTE:** For non-quantifiable services, please complete only sections 1 – 5. These may represent an important LEADERSHIP role the facility assumes, but is best communicated in narrative form.

Should you have any questions, please don't hesitate to call    Coordinator  
or email Charitable Giving and Community Outreach            Phone  
Email

# List of items we track through Excel

- Organizations – 103
- Date of events
- Activity
- Financial Donation
- # of People
  - ✓ Residents
  - ✓ Board
  - ✓ Staff
  - ✓ Volunteers
  - ✓ Waitlist
  - ✓ Community Members
- Hours
  - ✓ Staff
  - ✓ Volunteers
- Primary Contact
- Secondary Contact
- Future Tracking
  - ✓ Cost of Staff Time

# Frasier Management Survey for Non-Profit Involvement

- Surveyed management staff on current volunteer efforts and board positions
- Identified Non-Profits in the area that Frasier would like management staff to become involved in
- We started tracking management involvement with the local Non-Profit community

# Resource List

- [leadingage.org](http://leadingage.org)
- [christianlivingcommunities.org](http://christianlivingcommunities.org)
- [Lyonsoftware.com](http://Lyonsoftware.com) -CBISA -Tracking Software

# Contact Information & Resources

## Questions?

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## LeadingAge Social Accountability Listserv

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## Holleran Social Accountability Toolkit

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