

# **Social Accountability**

# P R O G R A M

the community benefit tradition of not-for-profit homes and services for the aging



## RAISING THE BAR

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LeadingAge Quality First is a philosophy of quality and a framework for earning the public's trust in aging services. LeadingAge Quality First reinforces the commitment that not-for-profit aging services providers have to maximize quality of care and quality of life for older adults. LeadingAge Quality First allows consumers to have confidence that the aging services they choose for themselves and their loved ones will meet or exceed their needs and expectations.

Quality First is also the overarching initiative under which all of LeadingAge work is focused and organized. LeadingAge offers programs and resources (such as this book and other materials about social accountability) that are based on the latest aging services field-related research and knowledge including valuable tools, information, education and support to help members honor the Quality First Covenant.

### **Produced by:**



LeadingAge ([www.LeadingleAge.org](http://www.LeadingleAge.org)) is an association of 5,500 not-for-profit organizations dedicated to expanding the world of possibilities for aging. We advance policies, promote practices and conduct research that supports, enables and empowers people to live fully as they age.

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The St. Louis-based Catholic Health Association of the United States (CHA) is the national leadership organization of the Catholic health ministry. By pursuing the strategic directions of mission, ethics, and advocacy, CHA is engaged in strengthening the health ministry for the future and creating health care that works for all. CHA represents more than 2,000 sponsors, systems, facilities, and related organizations that form the nation's largest group of not-for-profit health care. Founded in 1915, CHA unites the ministry engaged to advance selected strategic issues that are best addressed together rather than as individual organizations.

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**Please Note**

Implementing a social accountability program may involve certain state or federal laws. Your legal counsel and staff member responsible for risk management should review all documents to ensure compliance with these laws.

# Preface

From the earliest leadership documents reflecting the intended purpose of LeadingAge, our founders stated that the association is a “membership organization of non-profit voluntary” providers that “protects and advances the interest of the individuals” we serve.

Inherent in those documents were expectations for the mission of our members that LeadingAge now expresses in six ideals:

- Dignity of all persons at every stage of life
- Services people need, when they need them, in the place they call home
- Quality that people can trust
- Mission-driven, not-for-profit values
- Advocacy for the right public policy for the right reasons
- Leadership through shared learning

As LeadingAge developed and grew, we created a Commission on Ethics in Long-Term Care, now the Commission on Ethics in Aging Services, and an accreditation program to help members demonstrate accountability for their missions to those they serve. In 1993, LeadingAge, in collaboration with members and the Catholic Health Association of the United States (CHA), wrote its original *Social Accountability Program: Continuing the Community Benefit Tradition of Not-for-Profit Homes and Services for the Aging*. The purpose of the program was to help members demonstrate accountability to their communities, including local, state and federal government entities.

LeadingAge’s social accountability program meshes well with Quality First, a national accountability program for all aging service providers, which is designed to achieve excellence and earn public trust. When we tell our individual stories about our social accountability work, we enhance our reputations, earn public trust and increase the confidence of the consumers we serve and their families.

Transparent accountability has never been more important. Do we provide quality and value? Are we addressing society’s pressing needs as we serve older persons and those with special service requirements? Are we doing good? Are we doing well? How does the public know?

Public scrutiny around these questions of accountability is becoming more intense. We are in an *era of accountability*.

And, we must continue to lead the way. Leadership is expected of mission-driven, not-for-profit organizations. The nonprofit sector is a unique feature of American society – the sector that advocates for unmet needs, creates social capital, develops services that are difficult and unprofitable, and uses philanthropy and tax dollars to achieve these worthy purposes.

As part of the Quality First agenda, LeadingAge, in collaboration with CHA, is reintroducing our Social Accountability Program. The purpose of this program is to reaffirm the community benefit our members offer so that we can continue to be worthy of the confidence our society expresses in us through philanthropy and tax-exempt status.

Not-for-profit aging services groups are natural models of social accountability. And although the pressure to demonstrate our value is at an all-time high, the value, itself, is intrinsic to our organizations. We have been practicing social accountability since the beginning. Our task, then, is indeed about ***Continuing the Community Benefit Tradition of Not-for-Profit Homes and Services for the Aging***.

William L. (Larry) Minnix, Jr., D.Min.  
President & CEO  
LeadingAge

# The Origins of Not-for-Profit Social Accountability

Alexis de Tocqueville, writing in the 18th century, noted that the tendency to organize for the common good seemed to be inherent in the American spirit.

The full continuum of not-for-profit aging services is an integral part of this history. Singly and as a group, these aging-services organizations have contributed to our nation's heritage by meeting human needs through voluntary efforts.

Local, state and federal governments have accorded special tax privileges to not-for-profit organizations that advance the human condition out of altruistic motivation. It follows that religious organizations and other social institutions must frequently reflect on their activities and programming to ensure that they are operating consistently with their mission.

This nation's not-for-profit health care and housing organizations for the elderly have a long tradition of service. Many predate by more than 100 years the statutes that first exempted them from federal tax.

Over the years, federal statutes, augmented by Internal Revenue Service rulings, have developed both organizational and operational requirements for not-for-profit organizations applying for tax-exempt status.

The "charitable" concept has evolved in American federal tax law from restrictive notions of service to the poor, or what is called the indigent care standard, to the current definition of charity governing homes for the aged framed by a 1972 IRS Revenue Ruling. Revenue Ruling 72-124 exempts "homes for the aged" from federal taxation because the aged are highly susceptible to forms of distress due to their advanced years. To qualify for tax-exempt status, the organization must meet certain health care, housing and financial security needs of the elderly. These standards constitute the community benefit standard for aging-services providers under federal law.

Although several states have adopted the federal criteria for tax exemption, many have developed tests of their own, particularly for the purposes of granting—or denying—property tax exemption. Members of the general public may also have their own views on what constitutes charity. The current trend, however, is an emphasis by all groups on accountability with respect to the community service activities of not-for-profit organizations and their tax exemption.

The LeadingAge-CHA Social Accountability Program reminds our communities of the benefits not-for-profit organizations provide to the outside community over and above day-to-day services to their residents and clients.

## Purposes and Goals of the LeadingAge-CHA Social Accountability Program

The purpose of this program is to reaffirm the community benefit tradition of not-for-profit, tax-exempt organizations that provide housing and services for older adults by helping organizations plan, implement, report and evaluate community benefit.

### What Is a Community Benefit?

Community benefit activities are community outreach services that demonstrate an organization's charitable mission. Not all community-based activities are apparent community benefit programs or services. Some are more promotional in nature, planned and carried out primarily as a marketing tool. While these may potentially benefit the community, their primary purpose is not to respond to community need and should not be counted as community benefit.

Sometimes it is difficult to distinguish between promotional and service activities. The criteria below may help to determine whether the program is truly a community service. The program should respond to a unique or particular problem in the community and meet at least one of the following criteria:

- Financed through philanthropic contributions, volunteer efforts or endowment
- Generates a low or negative margin
- Responds to the needs of special populations, such as minorities, poor persons with disabilities, the chronically mentally ill and persons with AIDS

By their existence alone, not-for-profit homes and services for the aging serve a community benefit. They furnish health services and housing for a vulnerable population; employ members of the community in settings that value the dignity of their work; provide a gathering place for volunteers to help the elderly and each other; give individuals an opportunity to channel their financial resources to organizations that will use them to do good; provide leadership, research and innovation in services for older persons; and serve to educate the public about the needs of the elderly.

Activities that foster the highest quality of care and services for the elderly can also demonstrate each organization's community benefit and its continued adherence to mission.

Social accountability is a key component of Quality First, the aging-services profession's national quality improvement plan. LeadingAge Quality First is a philosophy of quality and a framework for earning public trust in aging services. Aging-services organizations can demonstrate improvement in the LeadingAge Quality First 10 Elements of Quality with successful social accountability programs.

The LeadingAge-CHA Social Accountability Program will:

- Guide not-for-profit organizations in how to re-examine their mission and reaffirm their commitment to the people they serve, their families and the community.
- Demonstrate how not-for-profit organizations can exercise leadership in determining community needs, advocating for community-wide responses and providing community services.
- Encourage not-for-profit organizations to give explicit recognition to community service needs and make the best use of human and financial resources in the planning and budgeting process.
- Assist in documenting and reporting the scope and range of community benefits to reinforce the appropriateness of their tax-exempt status with federal, state and local revenue authorities.
- Identify ways to demonstrate to public officials, the media and consumers the benefits to the community of a social accountability program.

## Getting Started

Many aging-services organizations are actively involved in social accountability programs—whether or not they realize it or are quantifying their efforts. For those starting out, LeadingAge and CHA suggest beginning with the organization's governing board and executive staff's commitment to social accountability and appointing a committee, task force or team to oversee the project as a whole. To identify community needs and promote the organization's community benefits, we suggest that a broad range of individuals and groups – including residents – be a part of this team.

There is no right or wrong way to use the tools in this publication. The important thing is to identify those components of the program that seem appropriate and practical. The LeadingAge-CHA Social Accountability Program was developed for all LeadingAge members—the full continuum of aging services. Each aging-services organization will implement its social accountability program based on its mission, capabilities and local needs. One way to expand your organization's capabilities is to partner with another aging-services provider or other type of organization.





# Reaffirming Your Commitment to the Elderly and Others in Your Community

A statement of mission or philosophy will distinguish your organization by describing your unique organizational philosophy and commitment. Mission and philosophy statements should include your organization's role within the community and explain how you view your community service role.

To clarify your organization's commitment to community service, it may be helpful to:

- Reflect on the roots and original purpose of your organization and its sponsor. What is the history of your organization? What community need prompted the establishment of your organization? Who were the original beneficiaries? Has your mission expanded? Why? To whom? How? How has the organization evolved to meet changing community needs?
- Review your organization's tax-exempt purpose. Federal law identifies certain categories of organizations that may be exempt as long as they meet certain organizational and operational requirements. Health care is not one of the IRS categories. Rather, homes and services for the aging, along with other health and human service organizations, derive their exemption from falling within the category of "charitable purpose" organizations.





## Developing a Community Service Plan

The direction and focus of your organization's service to the community will be driven by several factors: 1) the types of services your organization now provides; 2) services that already exist in the community; 3) the priorities of unmet needs; and 4) the collaborative possibilities with other community groups and agencies. Your community benefit plan may include these steps:

### **STEP 1 Define the Community Served**

Your organization's community service begins with defining the community served. The community can be defined in two ways:

**Geographic boundaries:** At first, the boundary might simply denote the one- or two-mile radius of your organization's physical location. Your organization might also take the boundaries of a religious congregation or parish, without limiting its outreach to members of the congregation.

**Target population:** Your community service plan most likely will not address all persons in the geographic area. Especially in early years of implementation, an organization should consider addressing the needs of a relatively small and specific group or groups such as:

- Persons on the organization's waiting list or persons inquiring about services
- Caregivers supporting elderly in the community
- All elderly in the community
- Elderly living alone or with few social opportunities
- Minority elderly, such as African American, Hispanic and Asian older adults
- Frail elderly, such as those who are homebound, have recently been discharged from a hospital or nursing home, or have difficulty with activities of daily living
- Poor elderly, such as those living in subsidized housing or in an area that is predominantly poor, or widows and couples with limited resources and income
- Homeless elderly
- Disabled persons: individuals with physical and/or mental disabilities or certain chronic conditions, or other groups with special needs

## STEP 2 Identify Unmet Needs of the Elderly and Others

Once your organization has defined the community you serve, identify the unmet needs of that community, including gaps in service, barriers to receiving needed care or services, or other factors that exert an impact on need.

**Existing community needs assessments:** Check whether a comprehensive assessment of community needs, which includes the needs of your organization's defined geographic and target population, already exists. Sources for this information include:

- Area Agencies on Aging
- State Units on Aging
- State and local health planning agencies
- State and local Community Development Block Grant (CDBG) agencies
- Local United Way
- State and local health and welfare departments
- Special studies by advocacy groups and academic centers
- Studies by health care institutions

**Organization-generated data:** Organizations may find that they already have a significant amount of information about the needs of their target group, including:

- Marketing reports: Examine existing reports for clues of unmet community needs and anticipated needs.
- Staff awareness: Key members of staff could meet and share information they have informally collected about community needs. For example:
  - Nursing staff may observe that an increasing number of residents are being admitted in poor nutritional health (need: community nutritional assessments, meal programs).
  - Social services staff may report emotional problems among the families of persons with Alzheimer's disease (need: family support groups).
  - Housing staff may discover that many applicants have needs other than housing but do not know how to access available community services (need: community education).

**Forum on health, housing and services needs of older adults:** Your organization might want to hold a meeting on unmet needs of the elderly in the community and invite individuals and groups to testify about their views. Invitees could include representatives from Area Agencies on Aging; AARP or other advocacy groups; geriatricians, community social workers and staff from hospitals and other settings; homeless shelters and other social services organizations; and church and religious congregation representatives.

**New data:** Some organizations may decide to collect new data from community service organizations and people in need. Respondents to questionnaires could include:

- Representatives of programs serving the elderly, such as Meals on Wheels®, day care centers, public health and housing departments, social service organizations and religious congregations.
- Elderly persons and others among your target population and their families. These persons could complete surveys and questionnaires in their homes or at gathering places such as shopping malls, restaurants, and meal or recreation programs.

### **STEP 3 Set Priorities Among Unmet Needs, Service Gaps or Health Problems**

Once you have identified opportunities for community service, set priorities and develop recommendations for what your organization could attempt to address based on your mission and capabilities. Identify which problems call for a collaborative approach with other providers and community groups, and which problems ought to be referred elsewhere.

### **STEP 4 Incorporate Community Needs into Your Organization's Planning and Budgeting Process**

Community service should become integral to your organization's planning and budgeting process. To integrate community service into planning and budgeting:

- Set annual goals and objectives for community service.
- If your organization has a strategic, operational or long-range plan, include a specific section on community service.
- Develop a budget for the community service plan.
- Make community service a regular board and management agenda item.



## Provide Community Service Activities and Demonstrate Leadership in Your Community

It is unnecessary for your organization to provide an array of new community service activities. In fact, the most successful programs are likely to be those that: (1) you are already doing; (2) are an expansion of in-house programs, opening them to community members; and (3) enter into community partnerships, adding the organization's participation to expand worthwhile community programs such as Meals on Wheels® or intergenerational day care. Some examples of community services and activities you might provide include activities that:

### **Improve the Quality of Life of the Elderly**

- Offer intergenerational recreation programs.
- Open recreation services to community members.
- Provide respite care.
- Participate in a Lifeline® program.
- Conduct pastoral care bereavement groups for families of residents who have died or other grieving elderly in the community.
- Provide housing or overnight arrangements for family members visiting residents.
- Invite older persons from the community to attend performances and other activities.
- Offer pre-retirement education programs.
- Open resident travel programs to older persons in the community.
- Develop an environmental awareness program: recycle, minimize disposable materials, conduct energy usage audits and institute a waste management program.
- Encourage resident and employee volunteering in charitable community projects.
- Encourage advocacy programs by older persons.
- Partner with the local Red Cross to host emergency preparedness workshops.

## **Improve Health of Older Adults in the Community**

- Hold health screenings with referral services at health fairs and other special events.
- Teach sessions on health promotion and disease prevention for nursing staff, medical directors and attending physicians.
- Provide immunization services (pneumonia and flu vaccinations).
- Sponsor or host Meals on Wheels® programs.
- Hold a lecture series on various chronic conditions.
- Make space available for a smoking cessation clinic.
- Participate in community-wide efforts to prevent suicide.
- Conduct health screening programs.
- Provide congregate meal programs for older persons in the community who are at risk of poor nutrition.
- Host nutrition classes.
- Make your resident fitness program available to older persons in the community.
- Host an Alcoholics Anonymous® program for older persons.
- Arrange wellness programs, such as nursing or pharmacy consultants teaching “Medicine Cabinet Safety.”

## **Improve Access to Needed Services**

- Open adult day care to those in the community.
- Initiate a physician referral program for geriatric medicine or physicians who participate in Medicaid.
- Develop in-house services for people living with AIDS.
- Provide information and referral services to persons on your waiting list.
- Set up comprehensive assessment services for older persons in the community.
- Support a mobile clinic for senior health services.
- Add an in-house clinic for older persons in the community.
- Locate a CCRC unit in an urban or other underserved area.
- Provide information and referral services.
- Hold health screenings with follow-up referral services.
- Open your physician or geriatric nurse practitioner clinic to older persons in the community.
- Develop housing programs for homeless older persons.

## **Help Contain the Costs of Care and Services**

- Offer free or discounted services to those who cannot afford them, especially if they are unable to pay for services not covered by Medicaid.
- Furnish high-technology services such as care of ventilator-dependent patients and others who might otherwise need hospital services.
- Subsidize entrance and monthly fees.
- Make in-facility health promotion and clinic programs available to older persons in the community.
- Donate needed equipment or food to homeless shelters or other programs.
- Set up special programs for Alzheimer's or other special needs residents that enable them to remain in their current level of care.
- Collaborate with other organizations to help poor persons afford needed medication and equipment such as wheelchairs or hearing aids.
- Purchase health-related or other supplies in bulk for residents.
- Subsidize rent for residents during temporary hospital stays.
- Arrange free dental care for residents unable to pay.

## **Reach Out to the Poor, Minorities, Persons With Disabilities and Other Underserved Persons**

- Arrange for dietary staff to cook or provide food for homeless shelters.
- Encourage staff and resident participation in holiday season food and gift baskets for poor families in your neighborhood.
- Invite disabled persons from the community to participate in certain recreational, rehabilitation and diagnostic activities.
- Involve residents in telephone reassurance programs for shut-ins or latchkey children.
- Open a child day care program for neighborhood families who cannot pay the full cost.
- Host an annual toy drive for children of the community.
- Provide internships for individuals from sheltered workshops.
- Team up with community school programs to develop self-esteem programs for children with learning disabilities.
- Open your swimming pool and other accessible programs to persons with disabilities.
- Offer your kitchen as a work site for vocational high school students.
- Make your organization's vans available to disability groups.
- Provide resident volunteers to accompany school children on day trips.

- Create volunteer programs involving minority adolescents in residents' activity program.
- Establish an "Adopt a Grandchild" program with neighborhood children of single-parent families.
- Operate a legal clinic for community seniors on advance directives, program eligibility and other legal matters.
- Provide in-home services such as physician visitations to low-income housing or hospice services.
- Set up case management services for older persons in the community.

## **Demonstrate Leadership**

In addition to specific activities and services, there is another group of less easily defined, non-quantifiable benefits that not-for-profit aging-services organizations provide to their communities. They involve having the organization serve as a catalyst, convener, facilitator and sustainer of community efforts by recruiting other organizations and persons to provide community services as well. These include:

- Identifying needs of older adults in the community.
- Serving as a vehicle for attracting and using donated funds and volunteer service.
- Educating health, social service and other professionals.
- Conducting research on problems of the elderly and innovative approaches to service delivery.
- Advocating and educating about improved and just policies.
- Promoting economic development in the community by addressing housing, employment, educational or environmental needs and concerns.





## Reporting Your Community Service Accomplishments

The process of reporting community services includes four dimensions: (1) quantifying your organization's community services; (2) preparing an overall report of community service; (3) incorporating information on community service throughout your organization's communications; and (4) targeting your message to various audiences.

The goal of the reporting process is to establish in the minds of those within and outside your organization that the organization is indeed a not-for-profit community service organization and is committed to service beyond its resident and client population.

Reporting your organization's community service does not simply mean seeking credit for good work. The goal is to be accountable to those who are part of the organization, to those who volunteer their time and donate funds, and to community members and government officials who grant preferential tax status. A side result of this accountability will be, it is hoped, greater participation by staff in your community service programs, increased donations for worthwhile projects and additional volunteer efforts.

### **STEP 1 Measure and Monitor Services**

The need to measure and monitor an organization's community services is becoming increasingly important. Collecting quantitative information on community services can help you respond to "official" inquiries about the organization's tax-exempt worthiness. It will also give you a better understanding of the costs of programs provided and the numbers of individuals served for use in future planning and budgeting.

Measure and monitor services by:

- Estimating the numbers and populations served
- Estimating the cost of community services and activities
- Evaluating the impact of services on a continuing basis

Many organizations group their community service activities into these categories:

- Community services - such as education on diseases and care for the aged or support groups
- Professional education – offering a teaching setting for medical, nursing, social service, pastoral care and other professionals

- Research – innovations that are shared with others, such as culture change or techniques for treating dementia
- Contributions – cash donations, grants or in-kind services

## **STEP 2 Prepare a Community Service Report on Services Provided Directly and in Collaboration With Others**

Develop an overall report of community service that describes the full scope of the organization's community service activities.

Include information about:

- Mission and values that compel your organization to be concerned about unmet community needs and to provide community service
- Geographic area and target population of primary concern
- Needs and problems your organization has uncovered and anticipates, especially among its own residents and among the elderly living in the community
- Services provided directly and in collaboration with others and how they have an impact on:
  - Quality of life of the elderly
  - Health status of the elderly
  - Access to care and services
  - Affordability
  - Poor, minority and other underserved persons
- Your organization's leadership role in relation to:
  - Education of social service, health, housing and other professionals
  - Research on innovative approaches to delivering services and care
  - Advocacy for improved public policies including those on behalf of the elderly, disabled and chronically ill
  - Fund raising and volunteer efforts
  - Economic development of the community
- Needs your organization is not able to address that you recommend for community-wide attention

## **STEP 3 Incorporate Reporting Community Service Into Your Organization's Communications**

On a daily, ongoing basis, your organization should seek opportunities to report about your community service. Your organization's role as a community service organization should be featured whenever you communicate to staff, the people you serve, their families, the media, policymakers and others in your community. By constantly reinforcing that your organization cares about unmet needs in the community and that you are doing what you can to address these needs, your image as a community service organization will be enhanced.

Some examples of opportunities for presenting your community service message include:

- Annual reports
- Web site
- Financial reports
- Resident, staff and community meetings and newsletters
- Posters at health fairs
- Recognition ceremonies for staff and volunteers
- Speeches to civic leaders and community groups
- Meetings for public policymakers at your facility
- Breakfasts for community leaders
- Envelope stuffers recruiting volunteers for specific services
- Press releases
- Advertisements in your local newspaper
- Marketing materials
- Orientation materials for new staff, attending physicians, residents and their families
- Inserts into religious congregation bulletins
- Agenda items for board meetings and staff meetings
- Bulletin boards or calendars of events

## **STEP 4 Target Information on Community Service**

Because different audiences have different interests, your organization may want to target the information about community services to the following groups:

**Governing body.** Trustees will be concerned about the financial aspects of the community services; however, it is also important that trustees be aware of the full scope of outreach activities, including those with little or no cost.

**Staff.** The staff needs to know that they are part of an organization working to help solve the community's health and social problems. They also need to know how they may benefit from any of your organization's programs.

**Residents and their families.** Residents and their families should be familiar with and understand your organization's mission and charitable purpose. They ought to be familiar with your organization's full scope of services and why you are involved with outreach services to nonresidents.

**Sponsors.** If your organization is part of a system having a religious or charitable sponsor, report how community services are related to the sponsor's mission and discuss opportunities for collaboration.

**General community.** Case studies should be used to focus on the value of your programs to individuals in need. Discuss the impact your service has on the community by reporting the numbers and types of persons served.

**Policymakers, civic and business leaders.** Present an overall picture of services being provided, focusing on how your organization identifies and responds to specific community needs. Highlight individuals you have helped as well as statistical results.

**Faith-based or other constituencies.** If your organization is affiliated with a religion or other group, describe how social service is part of the faith or constituent's tradition. Ask for the group's assistance in identifying problems and unmet needs among your members. Invite their participation in outreach services.



# Evaluate Your Community Service Role

## STEP 1 Evaluate Community Service Activities

Some questions to be addressed about services include:

- Are opportunities presented for participants to comment on the quality of the program? If so, what comments have been made?
- Are the numbers of individuals served at least equal to your expectation?
- Is the program serving the intended population?
- Is volunteer support consistent and as expected?
- Are program expenditures within expected ranges?
- Are goals or objectives being met?
- Have there been unexpected problems or benefits?
- Do changes in the community suggest a change in the program?
- Should the program continue? If so, should it change?

## STEP 2 Evaluate the Organization's Overall Community Service Role

The governing body and management of your organization, as well as the task force you appointed for this program, should periodically (monthly or quarterly) assess your overall community service role. Sample questions may include:

Is your organization doing enough?

- **Responsiveness to needs.** Is the level of community service reasonable considering the needs of the elderly or others in the community?
- **Comparison to available resources.** If a financial target (e.g., a percent of net revenues) was established, is it being met?
- **Comparison to other providers.** Is your organization doing at least as much community service as other nonprofit and for-profit homes and services for the aging?
- **Comparison to past efforts.** Is your organization doing more this year than last, and will next year's effort continue this trend?

Is the amount and type of community service consistent with your organization's mission and purpose?

- Review your mission statement and statements of philosophy.
- Reflect on the founders' intentions when your organization was established.
- Consider long-range planning goals.

Is your organization changing its services to the community as community needs change?

- Have programs been added or deleted over recent years?
- Has your organization conducted or obtained a community needs assessment?
- Are programs being planned in anticipation of expected future needs?

Is your organization sufficiently involving outside organizations in your community service? Involvement with other organizations includes:

- Exchanging ongoing information
- Cooperative programs
- Referral programs
- Joint community needs assessment
- Mutual goal setting and planning
- Joint effort to change public policy or fill a health or service need

Is your organization sufficiently informing both insiders and outsiders about its community service role?

- Board agenda regularly includes items on community service
- Web site includes a section on community service
- Annual report, newsletters or other documents highlight community service
- Employees and volunteers contribute their time willingly

Are program participants and persons outside of your organization sufficiently involved in the following processes?

- Defining the organization's commitment to community service
- Developing a community service plan
- Providing services and programs
- Reporting community service
- Evaluating your organization's community service role

# Conclusion

Peter Drucker defined the three fundamental sectors of American society that make it vibrant: business, government and not-for-profits. Each sector has a unique responsibility. Government's is to protect and oversee. Business' role is to generate an economy. Not-for-profits' responsibility is simple: to change lives.

More recently, Dr. Lester Salamon, director of the Johns Hopkins Center for Civil Society Studies, defined the not-for-profit sector's four major duties:

- To serve as guardians of values
- To meet emerging and often difficult societal needs
- To advocate for those often without public voice
- To create community (or social capital)

Meeting community needs and providing charitable care is not enough. We have to quantify what we are doing and tell our story to our residents, board members, staff, families, legislators and the community at large. Using this resource will help you develop new programs, validate the work you are already doing and provide the framework you need to quantify it.

For additional templates, resources and other members' examples of social accountability programs, please visit [www.LeadingAge.org](http://www.LeadingAge.org).