

DOCUMENT RESUME

ED 380 741

CG 026 155

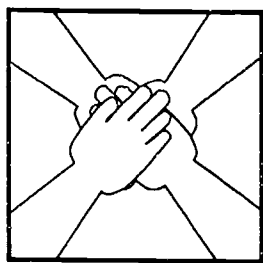
AUTHOR Sheehy, Edward
 TITLE Public/Private Partnerships: Building Support for Employer-Sponsored Eldercare: A Guide for the Aging Network.
 INSTITUTION Washington Business Group on Health, Washington, DC.
 SPONS AGENCY Administration on Aging (DHHS), Washington, D.C.
 PUB DATE Mar 93
 CONTRACT 90AT0473
 NOTE 92p.; For a related document, see CE 026 154.
 AVAILABLE FROM National Eldercare Institute on Business and Aging, Washington Business Group on Health, 777 N. Capitol Street, N.E., Suite 800, Washington, DC 20002 (\$10 prepaid).
 PUB TYPE Guides - Non-Classroom Use (055)
 EDRS PRICE MF01/PC04 Plus Postage.
 DESCRIPTORS Aging (Individuals); *Corporate Support; *Older Adults; Policy Formation; Private Financial Support; *Private Sector; Program Development; Program Proposals; *Public Agencies; Strategic Planning
 IDENTIFIERS *Elder Care; Employer Role; Population Aging; *Public Private Partnership Programs; Public Private Relationship

ABSTRACT

This guidebook provides practical information to assist state and local aging agencies in developing strategic relationships with businesses in their communities. It focuses on the experiences of those state agencies and Area Agencies on Aging that are actively working with local employers and it presents a framework for other agencies. The book is divided into five chapters. Chapter 1 gives an overview of public/private partnerships in employer-sponsored eldercare, and lists some of the reasons for the interest that companies and employees exhibit in eldercare activities. Chapter 2 shows how to build support for employer-sponsored eldercare through briefings for business leaders, committee work, and other strategies. Chapter 3 looks at the role a state association can play in bringing consistency to product and service development and the cost savings in centralizing marketing responsibilities. Chapter 4 discusses an approach for identifying an agency's strengths and capabilities and offers sample copy points that can be adapted for use in various marketing materials. Chapter 5 explores the function of a business plan, both as an internal management tool and as a document that can help attract funding support. A sample plan for guiding an agency through this process is presented. (RJM)

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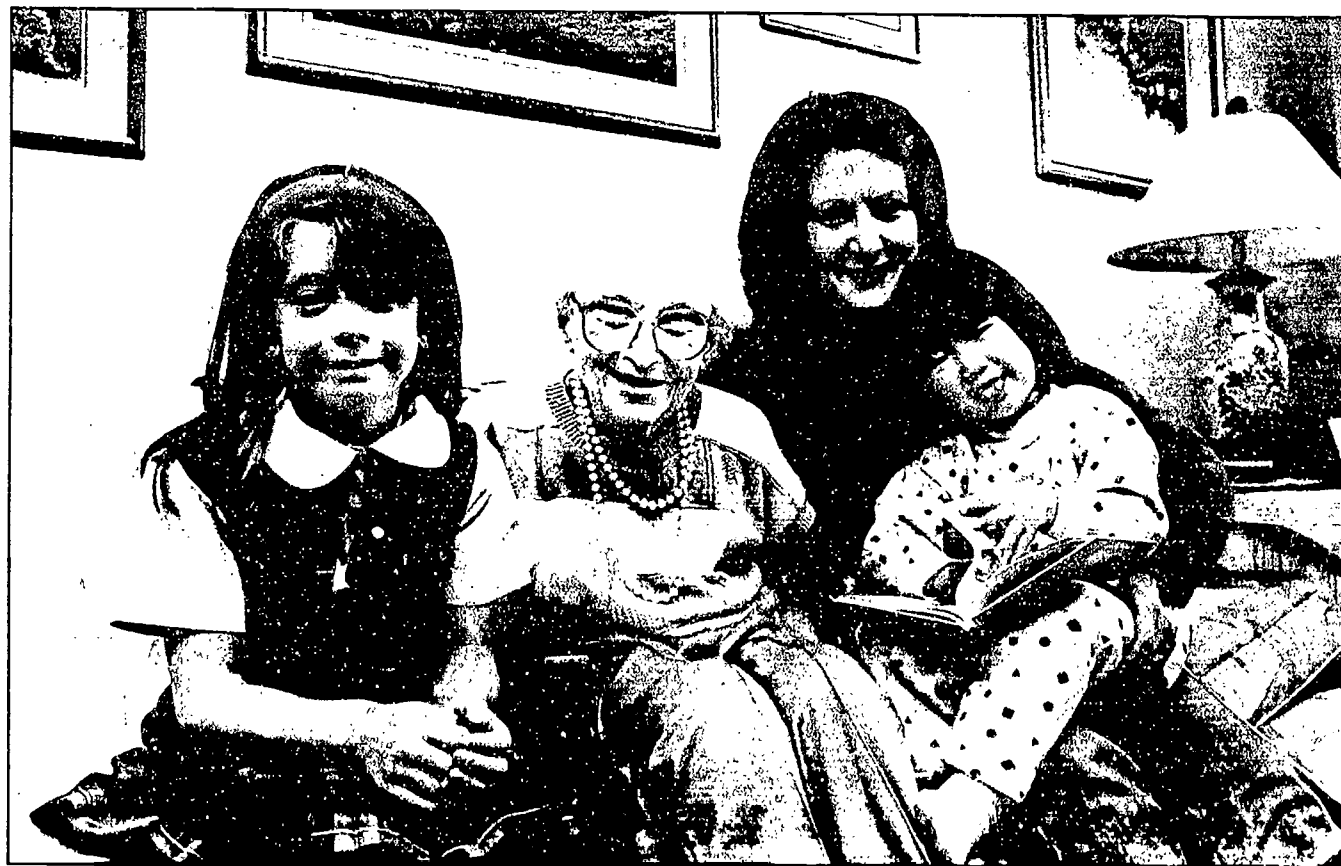
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A GUIDE FOR THE AGING NETWORK

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PARTNERSHIPS:
BUILDING SUPPORT FOR
EMPLOYER-SPONSORED
ELDERCARE

A GUIDE FOR THE AGING NETWORK

By Edward Sheehy
National Association of Area Agencies on Aging

March, 1993

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Copies of this publication can be ordered for \$10.00 from:

National Eldercare Institute on Business and Aging
Washington Business Group on Health
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Orders must be prepaid.

Cover photo: Bruce Stromberg—Reprinted courtesy of the
Philadelphia Corporation for Aging

Publication design: Carole Anne Nelson
CNF Editorial Services, Hyattsville, MD

This project was supported, in part, by a grant, number 90AT0473,
from the Administration on Aging, Department of Health and
Human Services, Washington, DC, 20201. Grantees undertaking
projects under government sponsorship are encouraged to express
freely their findings and conclusions. Points of view or opinions do
not, therefore, necessarily represent official Administration on
Aging policy.



Older Americans Act
NATIONAL ELDERCARE CAMPAIGN

Acknowledgements

Welcome to *Public/Private Partnerships: Building Support for Employer-Sponsored Eldercare—A Guide for the Aging Network*, one in a series of five guidebooks on partnerships between aging agencies and business. This guidebook was produced by the National Association of Area Agencies on Aging for the National Eldercare Institute on Business and Aging, a cooperative initiative of the U.S. Administration on Aging and the Washington Business Group on Health.

The purpose of the guidebook series is to provide practical information to assist state and local aging agencies in developing strategic relationships with businesses in their communities. In addition to this guidebook on employer-sponsored eldercare, other topics covered in this series include health promotion, older worker employment, and volunteerism, as well as strategic planning for partnership development.

The editor and principal author of this guidebook is Edward Sheehy of the National Association of Area Agencies on Aging. Chapter 3, *Statewide Coordination and Marketing*, was written by Debra Myers of Mass Eldercare. Patricia Hogan contributed significantly to Chapter 5, *Preparing a Business Plan for Eldercare*, as did Bill Laurie of the General Accounting Office in Denver, Colorado. Grateful thanks also are extended to Janet Sainer, Donna Wagner and Donald Hopkins for reviewing and editing a draft of the guidebook.

The Massachusetts Executive Office of Elder Affairs served as the host agency for the convening of an Eldercare Task Force composed of private and public sector representatives to advise and review the concepts discussed in the guidebook.

Editorial oversight at WBGH was provided by Sally Coberly, Ph.D., Associate Director of the National Eldercare Institute on Business and Aging.

Ultimately, we are indebted to all of the partners in action—those in the aging network and private industry who were willing to share their time and tell us about their experiences with employer eldercare.

Special appreciation is extended to the staff at the U.S. Administration on Aging for providing us the means and encouragement to complete this work.

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Introduction to Public/Private Partnerships in Employer-Sponsored Eldercare

The National Association of Area Agencies on Aging conducted a survey in 1991 to determine the extent to which the aging network is providing services to employed caregivers. Of the 419 AAA respondents to the survey, 20 percent reported some form of involvement with employer eldercare activities. The dominant area of activity was in educational services such as seminars, workshops, and publications. Although this is a comparatively small number of agencies, another 110 AAAs reported a likelihood they would be getting involved in employer-sponsored eldercare programs sometime during the next 12 months.

Of particular note here is the fact that this program activity arose despite a virtual absence of any formal training or technical assistance specific to the development and marketing of eldercare services to employers. State Agencies and AAAs have, by necessity, experimented with different approaches to employer eldercare initiatives; some have been successful, while others have served more as learning experiences.

The purpose of this guidebook, then, is to draw from the experiences of a number of state agencies and AAAs actively working with local employers and provide a framework on which other agencies can build.

What This Guidebook Will Cover

Chapter 2: Building Support for Employer-Sponsored Eldercare describes strategies for establishing consensus that eldercare is a business issue by conducting a business briefing for employers. Sample agendas for different meeting formats are included. Profiles of State Units on Aging and Area Agencies on Aging that have undertaken business briefings and formed business advisory committees are included.

Chapter 3: Statewide Coordination and Marketing looks at the role a State Association of Area Agencies on Aging can play in bringing consistency to product and service development and the cost savings in centralizing some marketing responsibilities.

Chapter 4: Positioning Your Agency as a Preferred Provider discusses a strategy for distinguishing your agency's unique strengths and capabilities and offers sample copy points that can be adapted for use in various marketing materials.

Chapter 5: Preparing a Business Plan for Eldercare examines the function of a business plan, both as an internal management tool and as a document that can help attract funding support. A sample plan is presented to guide an agency through this process.

The purpose of this guidebook...is to draw from the experiences of a number of agencies ...and provide a framework on which other agencies can build.

"We have to attract and retain the best people we can find, more and more of whom have issues regarding their family lives."

Ted Childs
IBM

Why Companies Are Interested in Eldercare

Employer-sponsored eldercare refers to a service that a company makes available to its employees and/or retirees who may have caregiving responsibilities for an older family member, relative or friend. Eldercare services enhance the employees' ability to give care and assistance to a dependent elder and link his or her relative with needed community services. Employer eldercare services are focused not on direct services for older persons, but on products and services that help employees find and use services needed by elders, thereby helping employees balance dependent care responsibilities with work requirements. Caregiving responsibilities have been linked to stress-related health problems and decreased performance, tardiness, absenteeism, and even early retirement.

A 1991 survey of 188 firms on the Fortune 1000 list found 68 percent of the companies saying they were considering or planning to implement "family friendly" initiatives, with eldercare and a variety of child care programs topping the list.¹

In a pioneering effort by American business, eleven of the nation's leading corporations, including IBM, AT&T and Johnson and Johnson, joined by more than 100 smaller businesses and nonprofit groups, announced formation of a new partnership: The American Business Collaboration for Quality Dependent Care. The Collaboration will provide more than \$25 million to help employees care for their children and aging relatives. Of the 300 programs to be financed in 44 cities, 15 percent are for the elderly.

Ted Childs, director of workforce diversity programs for IBM, the largest contributor to the Collaboration, put the dependent care issue in perspective,

These are family issues, not women's issues, but women have always been the primary caregivers for children and elderly family members. We're doing this because we have to. We have to attract and retain the best people we can find, more and more of whom have issues regarding their family lives. If we don't address those issues, they are going to be distractions.²

Why Employers Are Interested in Partnerships With the Aging Network

Bergman and Capitman characterized the majority of employed caregivers as providing what is described as "low-intensity" assistance, i.e., short-term assistance for older persons with minor difficulties in daily activities.³ The overwhelming need of low-intensity caregivers is for information about community services. Eldercare services, such as seminars and resource guides, are of the most benefit to low-intensity caregivers because these services can reach a large number of employed caregivers and can be provided to different businesses as "off-the-shelf" products. This need for information and referral plays to the strength of the Aging Network as the entities responsible for the development and coordination of home- and community-based services.

More employers are discovering the wealth of resources the Aging Network brings to a partnership for eldercare: comprehensive knowledge of the needs of older persons and their family caregivers, expertise in program planning and development, care coordination, and management of a wide array of home- and community-based services.

A growing number of employers are undertaking eldercare partnerships with State and Area Agencies on Aging:

- The New York State Office for the Aging assisted in coordinating a series of Business Leadership Breakfasts to encourage companies, unions, and elected officials to address dependent care issues in the workplace. The breakfast meetings were co-sponsored by corporate partners. Small grants were awarded to AAAs for follow-up activities at the local level.
- Two AAAs in Florida, with grants from the American Express Foundation, have collaborated with regional offices of the American Express Company to provide employees with worksite seminars and consultation on eldercare issues.
- The Southern Maine Area Agency on Aging in Portland recently assumed sponsorship of Child Care Connections. When combined with the agency's eldercare program, area corporations will be offered a complete dependent care program.
- Approximately 35 AAAs have contracts with national referral networks to provide eldercare services to national corporations.

Eldercare Activities Must Be Consistent with the Older Americans Act

Collaborations with employers represent a new means for the Aging Network to reach groups of people in addition to those persons traditionally served through the public programs. Partnerships may also generate resources to subsidize or expand aging services to the most needy elderly. The U.S. Administration on Aging encouraged State and Area Agencies on Aging to be in the forefront of engagement with the private sector, provided always that such relations conform with both the letter and spirit of the Older Americans Act.⁴

The basic issue for State Agencies and AAAs was summed up in a report of the U.S. General Accounting Office. GAO reviewed and assessed the adequacy of state policies on eldercare contracts with corporations in addressing ten issues in the Administration on Aging's Program Instruction on employer eldercare.

According to the GAO report:

The purchase of services by private corporations from public entities offers benefit and risk. The benefit is the infusion of private funds into an oversubscribed system of public services for persons 60 years of age and older authorized under the Older Americans Act (OAA). The risk is possible neglect of activities to achieve the public mission under OAA. These activities include the targeting of benefits to socially and economically disadvantaged individuals, state oversight of area agency on aging activity and preservation of the independence of area agencies on aging to act in the public interest.⁵

The Older Americans Act provides the required context for the strategies and techniques discussed throughout this guidebook:

1. Targeting criteria should be provided to assess periodically the AAA's performance in targeting individuals with greatest economic or social need, particularly low-income and minority individuals.
2. Targeting methods should be specified to ensure that the AAAs will continue fully and effectively to meet their responsibilities to target their efforts at older persons with greatest need.

[The] need for information and referral plays to the strength of the National Aging Network as the entities responsible for the development and coordination of home- and community-based services.

3. State oversight should include stipulations that corporate contracts should not restrict the ability of state agencies to exercise oversight of AAAs.
4. Information may not be withheld from the state agency by the AAA so as to inhibit the state from carrying out its oversight of AAAs to ensure preservation of public mission activities.
5. Public funds should not be used to supplement payments made by a corporation under a contract.
6. The ability of the AAA to act in the public interest should not be limited.
7. Confidentiality of client and contract information should be prescribed.
8. Fiscal controls and accountability should be established and implemented to ensure separate accountability of OAA funds or other public funds from private contracts.
9. The area plan should prescribe the AAA's approach, plans or current involvement with employer eldercare.
10. Exclusive agreements are not permitted because it limits AAAs from providing similar services to other companies or groups.

*The U.S.
Administration on
Aging encouraged
State and Area
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be in the forefront of
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Americans Act.*

Chapter 2

Building Support for Employer-Sponsored Eldercare

Most State and Area Agencies on Aging are experienced in bringing diverse groups together around a common aging agenda. The process of convening coalitions and facilitating inter-agency agreements is quite familiar to Aging Network organizations. It is frequently done with service providers, voluntary organizations and local government agencies. Acting as a broker among community organizations builds upon the mandate and strength of the Aging Network in developing a comprehensive and coordinated community-based system of care.

This chapter explores ways to apply these same skills to attract the support of the local business community to the issue of employer-sponsored eldercare. Two specific strategies will be examined: (1) hosting a briefing for local business leaders, and (2) organizing a Business Advisory Committee to consult on program development activities. We will look at successful practices of State Agencies and AAAs that have raised employer awareness of eldercare issues and built foundations for future collaboration in both areas.

Small Businesses—A Market Niche for AAAs

As noted previously, most of the companies involved in, or planning to develop, dependent care programs are among the largest companies in America. Yet, by far, the majority of companies in the United States are small businesses—95 percent of all companies employ fewer than 50 workers. For many small business owners, the costs associated with implementing a comprehensive eldercare program are beyond reach. Few companies are in a position to purchase a complete eldercare service package that includes telephone consultation, seminars, informational materials, orientation sessions for supervisors and managers, and caregiver support groups. Even small companies, however, may be able to purchase some services if the AAA is flexible enough to allow companies to choose a service package or an individual service that fits their needs and budget.

Several AAAs now offer a "menu" from which a company selects only a service or combination of services the company desires to purchase. The AAA applies a different pricing strategy depending on which service or package is chosen.⁶

Another strategy to attract the support of small firms is to pool the resources among local employers and provide them with a service an individual company cannot afford on its own. This pooling strategy, referred to as a consortium, has been used successfully in the employee assistance field. An Employee Assistance Program (EAP) is a worksite-based program designed to assist in the identification and resolution of productivity problems associated with employees impaired by personal concerns including, but not limited to, health, marital, family, financial, alcohol, drug, legal, emotional, stress or other personal concerns which may adversely affect employee job performance.

Establishing awareness of the importance and need for eldercare is a first priority.

An EAP consortium is a cooperative agreement among companies and agencies that do not have enough employees to warrant their own EAP. Instead, they pool their resources and develop collaborative programs to maximize the individual resources of each company. In some cases, the participating companies set up a not-for-profit organization to be the provider of the EAP service.

According to Dale Masi, a management consultant who has developed EAP consortiums in the government and private sector, consortiums for small businesses are a creative solution to the problems faced by these companies and their employees:

The use of consortiums increases efficiency and economy without hampering program effectiveness or the essential internal administration of the agency...In addition, consortiums offer the opportunity for several companies to share the cost of hiring an EAP staff that is diverse and very well qualified.⁷

Attracting Small Businesses

to Your Eldercare Programs

Many companies may express interest in eldercare services, but simply cannot afford to implement a program at the present time. AAAs can anticipate this reaction by being prepared to offer low-cost/no cost options to get the smaller firm "bought in" to work with your agency later on as circumstances change.

Here are some examples of low-cost/no cost strategies to gain the support of small businesses:

- Offer subscriptions to the AAA newsletter or tip sheets containing helpful information for caregivers. Put this information in a format that can be inserted easily in corporate newsletters;
- Give copies of your community resource directory and information about your agency to the appropriate contact within a company. Suggest that the company may wish to overprint its name as a "sponsor" and distribute it to employees.
- Invite small businesses to Area Agency annual meetings and luncheons so they can get to know you and your agency.
- Form an alliance with a community-based childcare resource and referral agency so you can offer employers a complete dependent care approach to work/family issues.
- Join local Chambers of Commerce and similar organizations to identify small businesses in the area and develop contacts within the organizations that support community programs, work/family programs, employee assistance programs, and other initiatives.
- Obtain the support of key employers in the community. Enlist their help as advocates among businesses for eldercare issues.
- Identify key human resources benefits organizations; send them information about your activities and attend their meetings.
- Get your foot in the door by working through the company's retirement planning program. Offer to provide a session(s) on consumer tips for long-term care insurance, legal and financial issues, or advice for caregiving retirees.

This mention of consortiums illustrates that eldercare, like EAP services, is a viable option for small businesses. The time and resources it takes to conduct briefings and create business advisory committees can be viewed as a step toward developing a dependent care consortium.

Business Briefings Provide Valuable Feedback

Market research is an important step to take before an agency begins offering eldercare services to local employers—making sure the services you develop are the ones responsive to the needs of businesses. A thorough analysis of your local business community will determine this market potential. Not only must you research the characteristics of firms (male/female ratios, hours of operation, size of business, locations, etc.) but you must talk to key people in the company who make decisions about dependent care or human resource development.

The market research step can be compared to a needs assessment—the process of gathering information to estimate the nature and extent of needs among older persons with the intent of identifying service gaps and developing a plan to meet those needs. Helping employers identify the extent of caregiving among employees and mobilize community resources in response to the perceived need is the essence of coalition-building.

Establishing awareness of the importance and need for eldercare is a first priority. Forging a consensus that eldercare is a business issue creates a sense of a shared mission between the public and private sectors. An effective way to build that consensus is to point to the universality of eldercare as a family and workplace issue.

In the next section we look at how some State Agencies and Area Agencies on Aging have conducted a business briefing to present information and solicit feedback from employers, thereby forming the basis of their market research.

Conducting a Briefing for Business Leaders _____

Despite impressive gains of support for dependent care programs among large corporations, eldercare remains a “hidden” problem in many smaller businesses. Often, employees are reluctant to discuss their family problems with supervisors and managers who may not be sensitive to these concerns and lack an understanding of the availability of services to which they could refer an employee. Much more remains to be done to inform small business owners and managers of the scope of eldercare today. At the state and local level, meetings with groups of business representatives are an excellent means for the aging network to present information and listen to employers react to proposed solutions.

The process of organizing an eldercare briefing for business leaders is similar to other community forums that many agencies are familiar with already. Attention to detail and follow-up are essential components of any successful meeting plan. There are some unique considerations, however, when dealing with companies having no previous knowledge about the existence or mission of State Agencies on Aging or AAAs. For example, aging network agencies may have to dispel preconceived notions about the quality of government-funded services to be viewed as a credible partner.

[Make] sure the services you develop are the ones responsive to the needs of businesses.

Getting Your Foot in the Door

Corporate representatives are bombarded with invitations to workshops and other solicitations. Because of this overload of information and limited time, human resources and benefits managers are selective in choosing which community activities they attend.

Assuming you can reach the right person, how can you increase the chances that an employer will send a representative to your meeting? Here are some tips to help plan your first, or next, business briefing:

- Who to invite

Target specific positions within the company, such as the CEO, human resources director, personnel director, employee benefits manager, or community relations representative. If an Area Agency has previously worked with a specific employer, those individual contacts may be helpful in identifying the best internal advocate and for eliciting names of their colleagues at other corporations. Your local Chamber of Commerce may also be able to provide a list of possible attendees. Ask if your Board members have any suggestions.

Once you have identified the company representative who would likely be interested in an eldercare program, you should deal solely and directly with that person. Contacting more than one person in a large company may create confusion.

Strategies

for Handling Lack of Interest

State Agencies and AAAs will probably encounter companies who have not given any thought to dependent care issues. Their reaction to an invitation to attend an eldercare briefing may be one of complete indifference.

A company may not be interested because they are not convinced eldercare has any impact on the work performance of their employees. In cases like this, it may be helpful if your agency can ask a company to provide a "testimonial." A good reference from a respected company is one of the most powerful tools available to promote your agency's eldercare expertise.

A company's indifference may reflect the fact that eldercare is still a "hidden problem." Employees often feel uncomfortable or reluctant to discuss family issues with managers and supervisors. In situations like this, the

employer has too little information for deciding whether eldercare programs are worthwhile. These employers may need to see the hard data drawn from national studies to justify an investment of their time in this area.

Be wary, though, of pushing the caregiver research too much with all employers. In some cases the firm may know eldercare issues exist, but the problem is not considered a priority.

Remember, it takes time to build up interest and support. You may have to start with a small core group of interested employers. Later on, you can go back to employers who turned you down and tell them what you have been doing. Keep them on your mailing list and periodically send them news of any work your agency may have done recently for other employers.

- Getting on the agenda with existing business groups

As an alternative to sponsoring its own briefing, an agency may wish to link up with an existing group, such as the Chamber of Commerce or Rotary. This is the least expensive and probably the most effective way to attract business leaders to your presentation. CEO's and proprietors of small businesses are more likely to attend regularly scheduled meetings of a business or professional organization than an additional meeting on the topic of eldercare alone.

- How to approach a corporation

If your agency has not previously worked with an employer, send a letter of self-introduction and invite the senior human resources or personnel director to designate someone as a liaison to your agency. If your meeting has a corporate co-sponsor, consider having the letter of invitation come from that organization. Employers may relate better to a colleague's letter than one from an unfamiliar agency. If you are soliciting participation from smaller businesses, you might want to directly invite the president of the company.

Once employer representatives are identified, they should be contacted by telephone to request their participation in the briefing. Make sure you state who in the company referred you and that a confirmation letter will be sent.

After your telephone call, follow up with a confirmation letter restating the general purpose of the briefing and providing the specifics as to the date, time, and location. A registration form to be returned to the agency to verify attendance should be included. You also may wish to enclose a list of the other confirmed companies sending representatives.

Two weeks prior to the workshop, send a follow-up letter to employer representatives and include the finalized participant list as well as any background materials. Do not, however, overwhelm the invitee with paper or suggest that reading is a pre-requisite for attending.

- Where to hold the briefing

The location for the briefing should be geographically central to participants. Good meeting site prospects may be in office parks or highrise office buildings housing a concentration of companies. Check with your local Chamber of Commerce to find out if there is a banquet facility, restaurant or hotel popular with the business community.

- Planning the program

Consider enlisting at least one key business leader to be your co-host and/or keynote speaker. A corporate retiree may be just the person to act as the spokesperson. The meeting should be participatory and include the perspectives of both corporations and service provider organizations. Sample agendas for a business briefing are shown on pages 10 and 11.

- Time of day for the meeting

Depending upon the locations of your company participants, you should find out the best time for your meeting. Often, breakfast meetings attract better participation because the representatives can attend on their way to work. Midday or late afternoon meetings are often likely to result in cancellations due to conflicts in the office.

As an alternative to sponsoring its own briefing, an agency may wish to link up with an existing group, such as the Chamber of Commerce or Rotary. This is the least expensive and probably the most effective way to attract business leaders to your presentation.

- Should a fee be charged?

Some agencies charge a reasonable fee to cover site costs, refreshments, and materials on the theory that more value is attached to something that costs money than a program offered free of charge. On the other hand, a free breakfast may be just the incentive to get some people there who might not otherwise attend. An alternative may be to identify a corporate sponsor willing to underwrite the cost of your meeting. Remember, this is the first opportunity for some employers to see your agency in action. Make sure you deliver an excellent presentation.

Sample Agenda

for a Breakfast Briefing

For presentations to CEOs and high-level managers, one-and-one-half to two hours is the maximum time you can expect participants to stay. Focus on a single issue. This format could also be adapted for a luncheon briefing.

- | | |
|---------|--|
| 8:00 AM | Breakfast served. Buffet or continental. |
| 8:15 AM | Welcome and introductions by business host Opening remarks: Impact of an Aging America in the Workplace |
| 8:30 AM | Guest Speaker(s): Resources in the Community to Assist Employees and Their Older Relatives An Introduction to Your Local Area Agency on Aging |
| 9:30 AM | Adjourn |

Sample Agenda

for a Two-Hour Business Briefing

This format is good for human resource managers, personnel directors, benefit plan administrators and others. It allows enough time to explore workplace options to assist with employee caregiving needs and introduce the resources of the local AAA.

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| 8:30 A.M | Registration and coffee |
| 9:00 AM | Welcome and introductions by business host. Opening remarks: Impact of an Aging America in the Workplace |
| 9:30 AM | Speaker # 1: Eldercare—The Hidden Problem: Evaluating Employee Needs |
| 10:00 AM | Speaker # 2: Costs and Benefits of Dependent Care Assistance Programs |
| 10:30 AM | Speaker # 3: Resources in the Community to Assist Employees and Their Older Relatives. An Introduction to Your Local Area Agency on Aging |
| 11:00 AM | Adjourn |

Sample Agenda

for a Half-Day Workshop

This format allows the organizers to address the widest range of issues and services available for the employer and employee. The half-day format provides a forum for extended interaction between employers and aging network professionals. An optional program feature would be the inclusion of table-top displays or information tables staffed by community service providers.

8:30 AM Registration and coffee

9:00 AM Welcome and introductions by business host. Brief review of agenda.

Opening remarks: Impact of an Aging America in the Workplace

9:30 AM Presentation by EAP representative and/or panel of human resource professionals. Review of eldercare options to include:

- Flex time
- Job sharing
- Family leave
- Compressed work weeks
- Dependent care spending accounts
- Managerial training
- Long term care insurance
- Direct subsidies for adult day care/respite
- Educational materials/information services
- Resource and referral
- Caregiver support groups

10:30 AM Refreshment Break

10:45 AM Concurrent Break-out Sessions

1 Resources Available in the Community: An Introduction to Your Area Agency on Aging

2 Navigating the Maze of Service Providers—presented by a care coordinator addressing the issue of working with a community of providers.

3 Employee Pre-Retirement Seminars. A discussion of the components of an effective pre-retirement education program

Noon Adjourn

Establishing a Business Advisory Committee _____

In an effort to involve the private sector in community activities, company representatives are often invited to join other leaders on a task force. This group usually is responsible for conducting research to determine the feasibility of new programs.

The formation of a community-wide task force may be a logical follow-up to a briefing held for employers. Key leaders and business advocates will have been identified and can be approached about serving on the committee. Such a task force can be called a business advisory committee or other suitable name.

A business advisory committee can assist your eldercare program in a variety of ways. Business representatives may be able to:

- Provide your agency with training in areas such as: use of the telephone for sales and marketing; developing a marketing plan; time management skills and sales techniques;
- Assist with the development and design of brochures and other materials.
- Act as a spokesperson for your agency's eldercare program, thereby adding credibility to your efforts and building community support and goodwill.
- Recruit others to assist with your program needs.
- Participate in workshops and briefings for other employers.

Responsibilities of Business Advisory Committee Members

Business leaders are generally very task-oriented and want to see their time well spent and productive. Make sure your business volunteers know exactly what is expected of them and that you will use their time efficiently as possible. Suggested responsibilities for committee members may include:

- Attend and participate at all meetings.
- Provide consultation as needed—this generally involves telephone consultation relating to programs, public relations and administrative decisions.
- Arrange for in-kind support, such as printing and co-sponsorship of workshops, meetings, refreshments and facilities.
- Assist in marketing the program to the business community. This may include personal referrals, providing lists of potential sponsors and/or business persons who may be interested in the eldercare program, and/or speaking on behalf of the program.
- Advise on and help facilitate public relations activities. Members may be able to assist in arranging TV interviews and printing and distribution of marketing materials.

Best Practices by State and Area Agencies on Aging _____

A number of states and AAAs have organized briefings, workshops and seminars for employers to build awareness about eldercare and start a foundation for future collaboration. We interviewed several State and Area Agencies on Aging to find out first hand what worked and what didn't. Their responses follow. Similarly, two examples are included of AAAs who have organized business advisory committees to provide feedback on program development and ideas for corporate marketing.

Business leaders are generally very task-oriented and want to see their time well spent and productive.

Delaware Health and Social Services

Division of Aging
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Coordinator

Background

In conjunction with the Delaware State Chamber of Commerce, and with funding from the U.S. Administration on Aging, the Delaware Division of Aging increased public access to community-based, aging-related support services through a multi-faceted media campaign, a series of seminars that ultimately reached more than 500 employees, and a variety of activities with employers.

Highlights of What They Learned

- Use the media.

A news conference was held to announce the project and the results of employee and employer eldercare surveys. A special supplement was prepared as an insert to the member publication of the Delaware State Chamber of Commerce. The supplement, *Eldercare and Delaware Business*, presented the eldercare issue in both national and Delaware contexts and included a community services directory as the centerfold. Many reprints of the supplement were ordered.

"We called local employers and asked them about their eldercare policies and benefits. We didn't use just large companies, but also highlighted smaller companies," says Metten. "We also did a page on questions frequently asked of the Division of Aging, a page on eldercare research by a local university professor, and a page on other public-private partnerships within the Division of Aging."

- Existing groups can provide support.

The Chamber of Commerce suggested that the project use the existing Labor Relations Committee, which consists of about 35 human resource professionals, as the project's advisory committee. This worked extremely well because the committee members were well-informed about work/family issues and they gave their support to this broad-based approach through the Chamber. Several of them opened their businesses for the employee workshop presentations. The Division of Aging also marketed their caregiver seminars through service clubs and the Chamber of Commerce. During a one-month period, they had 25 requests for seminars.

- Surveys raise awareness.

Using assistance from the University of Delaware, the Division of Aging surveyed 3,000 employees and 3,000 employers about eldercare issues. This survey helped raise awareness of the issue throughout the state. In addition, two employers ran their own surveys and found that "eldercare was a top-of-mind issue for their employees," and they subsequently expanded their eldercare offerings.

- Volunteers can help present workshops.

The media campaign generated several volunteers. Ten of these volunteers presented the portions on how to care for an elderly relative and access community-based support services at 30 employee workshops.

- Rural areas take more work.

Delaware planned to hold two employer seminars—one in the southern, rural part of the state and the other in the northern, urban part. The southern seminar was canceled due to lack of interest. "We learned that a different approach in rural areas is warranted. Eldercare activities should be much more grass-roots focused. There has to be more networking, more presentations—it's a more arduous task of building consensus."

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Richard Killian

Eldercare Program
Manager

Bill Spellecy

Assistant Director
Program Implementation and
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Background

In the late '80s, the governor commissioned a Task Force on Work and Family to study and make recommendations on ways to help working families balance job and family responsibilities. The Task Force completed its study in 1989. Out of the study's 14 recommendations, nine said the state needed to take a broader perspective on family care issues, including eldercare.

As part of a statewide effort to address dependent care needs, the governor called for a series of statewide "Business Leadership Breakfasts" to encourage community businesses, unions, and elected officials to address the issues of dependent care in the work place. The aim of the breakfasts was to start things at the state level and then put it in the hands of the locals. The State Office on Aging awarded follow-up grants of about \$2,500 to Area Agencies on Aging where a business leadership breakfast was held. A range of follow-up activities has taken place, including the establishment of ongoing task forces, the creation of eldercare resource centers, and the development of seminars.

Highlights of What They Learned

- Locate good planning committee members.

"It's important that the responsibility is assumed by the business community, and one way to do that is to work through the local employer organizations such as Chambers of Commerce," says Killian. "You want the identification to be from the community itself, and NOT from a public agency. Local Chambers of Commerce are very well-informed as to which organizations are likely to be responsive. The Chambers of Commerce can be very helpful in advising a committee about good candidates for membership on the committee. There are many referral networks that would fit in. The Department of Economic Development has ties with all sorts of businesses.

"We also used organizations that had experience in other sectors—childcare, EAPs, etc. Very often, there was an existing relationship prior to getting involved, and we were able to build on that. Every AAA has some kind of connection with the private sector—service clubs, etc.—that can be an entry point."

- Assess the level of commitment.

"The more time you can allocate for planning, the more likely your initiative will be successful. You can't do it in one or two meetings. You need staff commitment, and in order to get that, support at the leadership level is important.

"Also, before you get involved you need to ask if there is any money available from my organization to subsidize costs related to the breakfasts? Where's the money coming from? Get that out front."

- Build in preparation time.

Three to four months preparation were necessary for each breakfast. Planning for each event started at the state level and then moved to the local level planning committee.

- Surveys can provide surprising support.

A number of employers who attended the breakfasts conducted their own employee surveys. They were reasonably convinced that childcare needs would show up as their employees' number one concern and were surprised when eldercare was often identified as the major concern. So the breakfasts and surveys shifted some employers' attention to include eldercare.

- Make sure the invitation isn't from just one agency.

The official invitations came from the Governor's Chamber for each breakfast. These invitations were individualized to include the local co-sponsors and the names of local and state planning committee members. The fact that the invitation came from the Governor's Chamber was very helpful in getting the attention of business, union, government, and other non-profit organizations.

New York State Office for the Aging [cont.]

- Local committees had major responsibilities.

In each community, the state planning committee ensured that a local planning committee was established comprising some 20 to 30 people, drawn from all sectors of communities. "Its very important to get businesses and unions involved in a planning group." Planning committee members were looked upon as resources both to get the breakfast off the ground and to sustain interest in dependent care.

Private sector members of the local planning committees often were asked to help identify funding sources. Breakfast costs ran in the thousands of dollars.

Planning committees also were expected to help with publicity. A lot of diligent communication was done to get members of local planning committees to make their mailing lists available.

- A clearinghouse was established.

One recommendation of the Governor's Task Force on Work and Family was to establish a central clearinghouse to which employers could turn for guidance. A Work and Family Resource Center was established in 1990 as part of the State Department of Economic Development to develop various dependent care models (both childcare and eldercare) and serve as a clearinghouse.

The State Office's relationship with the clearinghouse is excellent. They keep the clearinghouse up to date on their activities and publications.

- Follow-up is crucial.

The purposes of the breakfasts were to serve as a kick-off to sensitize employers and to initiate community action. There also has to be extensive follow-up on the part of some local group—AAA, task force, or advisory committee. Somebody has to take a look at the total coordinated effort.

- Invite influential community organizations.

Each local task force decided whom to invite. The state provided general guidelines: (1) target corporate decision-makers or corporate people who have the ear of the decision-maker, and (2) target influential community organizations, like the United Way.

- Get a good mix on the planning committee.

The state planning committee was an interagency committee with 12-14 people from various state agencies: Social Services, Economic Development, the Division for Women, Childcare, etc. It did not include corporate members, except for the Business Council of New York State, which represents employers. "It's a very heavy duty organization" says Killian. "As a government initiative, we never functioned in a vacuum. It was understood that while we may have identified an issue as a special interest to us, it always involved the private sector, unions, and other government agencies with a similar objective. You need to have that mix."

- Run a tight program.

From start to finish, these were very, very tightly orchestrated events—close to an hour and a half. (Generally, the breakfasts ran from 8 a.m. until 9:30 a.m.) A lot of time was devoted to who would be the speakers. Each speaker had to be advised that their remarks should be short. These people [attending the breakfasts] had jobs!

- Caregiver Resource Centers were created.

Seventeen of New York's 59 AAAs are funded by the State Office on Aging to operate Caregiver Resource Centers. As part of their responsibilities the centers must work with local employers to respond to employee needs. In general terms, the eldercare initiatives through the resource centers have served as matchmaker/broker between service agencies and employers. They make information available about the types of services available in the area that may assist working caregivers. In some cases, management training on topics such as sensitivity to working caregivers and available community services also was given.

The Resource Centers provided invaluable assistance in the areas that conducted Business Leadership Breakfasts and, in several instances, conducted breakfasts or lunches independently of the state-level activity.

South Carolina Commission on Aging

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Background

In February, 1991, under a Partnership in Aging grant from the U.S. Administration on Aging, SCCOA—the South Carolina Commission on Aging—sponsored a half-day seminar on eldercare for both large and small businesses. Forty businesses attended. SCCOA also sponsored a subsequent workshop for aging service providers interested in developing business partnerships.

Highlights of What They Learned

- Get a good facilitator.

The conference planning committee chose a facilitator who had conducted many seminars for them in the past, with experience in both business and aging. He was able to go from one component to the next, solicit questions and feedback to generate some real networking. "He provided professional continuity to the entire program," says Hoernig.

- Hold a separate event for the aging network.

Many aging network staff were interested in attending this event, but Hoernig says they needed to target business people and she was afraid aging network staff would outnumber businesses. "Instead, the State Office on Aging conducted a workshop later at our annual aging conference on how to work with businesspeople. The videotape developed for the business eldercare seminar is available for loan across the state. The results of the seminar evaluations are also shared in order to assist aging service providers with the expectations of employers."

- Hold lunch "hostage" to obtain evaluation forms.

The format of the seminar was presentations/video/discussion in the morning followed by a networking lunch. To have lunch, participants had to turn in their evaluation form. They had a 100 percent return rate!

- Tell the whole truth.

One seminar participant noted on the evaluation that a presenter wasn't entirely "truthful" because she didn't talk about the waiting lists the participant knew her agency had. The State Office on Aging felt that although the presenter was legitimately focusing on other things, it was the absence of waiting list information that resulted in her appearing to be less than totally upfront. The State Agency now recommends AAAs point out when there are waiting lists or other barriers to accessibility.

- Localize and be practical.

Hoernig felt one of the best things they did was to give very specific, local information on what was available. She also recommends knowing ahead of time what small businesses can do to provide eldercare services, and having low-cost/no-cost options for employers who want to start small.

- Use businesslike sites.

The workshop was held in a large conference room at the local Chamber of Commerce. According to Hoernig, that made a big difference. "Businesses were familiar with it. I would highly recommend that it not be at a state agency. Maybe afterwards, but initially you want to draw them in. Use someplace businesses recognize and are comfortable attending, like a local hotel!"

Illinois Department on Aging

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Jan Costello

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Background

With the support of an AoA Partnership in Aging grant, the Illinois Department on Aging (DOA) sponsored four seminars for employers and labor organizations on the implications of an aging workforce. Three of the seminars were led by local AAAs with the DOA's assistance, and all involved a public/private planning group. Attendance at the seminars ranged from 50 to 120.

Highlights of What They Learned

- Personal recruitment makes the difference.

One-to-one recruitment was key to the success of this project. AAA/DOA staff made personal visits to potential members of the planning groups to urge them to attend the seminars. "People who came [to the seminars] came because they had a personal phone call from a friend or colleague encouraging them to come," Costello says.

"You can send out thousands and thousands of flyers and they won't come unless they get a call explaining why this is different from a seminar they may have gone to last week. I really can't stress that enough. It's really making the local planning committee understand that the flyers don't get them there. It is that personal contact."

- Have large planning groups.

Costello says, "It's really difficult to provide outreach to the business community. So the more businesses you can have on the ground level, the better. It's nice to have a key co-sponsor who's going to chip in \$5,000, but it's even greater to have 10 co-sponsors who contribute \$500 each, because the more businesses involved in the local planning committee, the better the outreach. This was especially important because the success of the events depended less on the size of the event than on the diversity of participants."

- Be sensitive to the concerns of your business partners.

The Illinois effort targeted labor unions as well as employers. They found the latter audience required some different approaches. At one planning meeting, the first thing a labor representative noticed was that the flyers did not have a union "logo." Another time, no one on the planning committee realized that a key speaker came from a non-union business. That caused problems.

"So we learned to make sure everyone on the [planning] panel understands completely who is being asked to come," remarks Costello.

- Emotionally, it is a risky business.

Public/private partnerships were new to both sides. AAAs had to learn they could ask for help from the private sector, and business co-sponsors were asked to try something they had never tried before. Costello recommends giving private partners lots of feedback to help counteract this feeling of risk. "You have to be willing to give a lot to get a lot in return."

- Press coverage is important.

Not only does press coverage help you reach people who can't attend the meetings, but it helps raise the sense of co-sponsors and participants that employer eldercare is truly an important issue. Costello notes that even coverage in the national aging press was very well received by the co-sponsors to whom she sent copies of the articles. Give sufficient lead time to newspapers to arrange coverage.

- Pursue other information venues.

Every other month the Illinois DOA distributes a newsletter to those involved in the eldercare effort to share "best practices." They are also planning a reception at the state fair. A resource table at the seminars enabled members of the planning committee (both public and private) to put out materials which were very well received.

New York City Department for the Aging

Partnership for Eldercare
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Background

Recognizing that eldercare is a concept poorly understood by corporate America, *Partnership for Eldercare* has undertaken to educate employers on this vital multi-faceted issue in a number of ways. In cooperation with American Express, J.P. Morgan and Philip Morris, the Partnership's ongoing employer education program has included an Eldercare Breakfast Seminar to present findings of the Partnership for Eldercare Research Study, one of the earliest, if not the first, study of the actual use of services by employed caregivers. The breakfast was attended by more than 100 New York City corporate leaders.

Additionally, within the past two years, *Partnership for Eldercare* has presented its "Eldercare Educational Seminars" for a fee at five major New York City corporations. *Partnership* has found that, for some corporations, purchasing a series of seminars is the first step in introducing eldercare as a workplace issue.

In May, 1992, the *Partnership* was a principle organizer of and presenter at the New York Business Group on Health's Conference/Fair, "Making the Case for Eldercare."

NYBGH is a 250-member, non-profit organization of businesses, labor unions, insurance professionals, health care providers and government and voluntary agencies. One of NYBGH's specialized working groups is the Task Force on Eldercare.

The *Partnership for Eldercare* director serves as its co-chairperson. The Task Force is actively involved in studying eldercare issues, exchanging experiences about worksite programs, sponsoring research, issuing publications, and presenting conferences intended to sensitize employers to the contributions eldercare programs can make to employee well-being, morale and productivity.

Highlights of What They Learned

- Competition is good.

Partnership for Eldercare's experience has shown that competition is good. By working with the NYBGH's Eldercare Conference/Fair and similar projects, *Partnership* can keep current on state of the art in eldercare issues and on what the competition is doing. Through working together with other eldercare programs on events such as the conference/fair, enormous publicity and information on behalf of eldercare programs is generated in the business community.

New York City Department for the Aging [cont.]

- Businesses like to keep current on their competition's employee benefits package.

The "Making the Case for Eldercare" Conference/Fair showed conclusively that businesses like to keep abreast of what their peers are doing and wish to be known as companies with progressive employee benefit packages. Where caring for an elderly relative once was viewed as a personal matter, we now know that an employee caregiver carries that responsibility and concern to the job. This employee concern is an employer concern since it affects employee health, morale and job performance.

Growing recognition of this fact was manifested in Conference participation. The Conference/Fair was so popular that registration had to be closed a week before the event. The 120 corporate guests heard several points of view on eldercare in a panel discussion featuring eldercare program and business representatives.

Following the panel, guests visited a hands-on information fair showcasing five different eldercare program models, including *Partnership for Eldercare*, each staffed by both providers and users of the model. The models included Benefits and Policies; Community Resources and Training; Employers and External Providers; In-House Programs; and Labor-Sponsored Programs.

The range and variety of models provided the audience with options for eldercare activities and allowed them to ask their own questions about ways of responding to their employee needs.

- Public/private partnerships have an effective affinity.

By working with the New York Business Group on Health, *Partnership for Eldercare* has found that once businesses are committed to the eldercare concept, they make for the best possible advertising to other businesses. Through the years, *Partnership for Eldercare* has found that the active cooperation and participation of client companies has a vital impact on the business community's views on eldercare programs. *Partnership for Eldercare's* participation at the NYBGH Conference/Fair was greatly enhanced by the presence of a business partner representative who was available to field questions on behalf of the program during the information fair.

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Background

The *Florida Partnership for Eldercare* was developed to provide an enhanced centralized source of information regarding programs, services, and care alternatives for the relatives of employees of American Express in two Florida cities. It is a collaborative effort of American Express, the U.S. Administration on Aging, the National Association of Area Agencies on Aging, the Agency on Aging of Broward County, and the Northeast Florida Area Agency on Aging. The program is modeled after the Partnership for Eldercare program of the New York City Department for the Aging.

In conjunction with Jacksonville's annual "Week of the Working Parent," American Express and the Northeast Florida Area Agency on Aging held a breakfast briefing for 80 CEOs and personnel directors for local businesses. The breakfast alerted them to the importance of eldercare programs for their employees.

Highlights of What They Learned

- Take the long-term view of your business relationships.

"Longevity helps in marketing services. If you can keep yourself going for several years, they'll think of you when they are ready to initiate an eldercare program," says Gardner Riel, the eldercare specialist hired by the Northeast Florida AAA.

Among Riel's techniques: Attend "everything" in the community having to do with business. She also volunteers for highly visible tasks that deal with work and family issues. Riel goes to every Chamber function that she can. "You really need to be out there," she says.

Riel talks to people about the program regardless of their place in their company's decision-making process: "Later on you can call them and ask to be introduced to decision makers," Riel noted. Following their breakfast briefing, she sent a thank-you letter to everyone who attended and a letter to people who had been invited but sent a substitute (she knew about the latter by careful cross-checking of the sign-in book).

Riel also sent a letter to people who didn't come saying she was sorry they couldn't attend and that she would contact them later. Information from the forum was enclosed with the letter. Riel scans the trade and business publications for articles on eldercare to send to her contacts. She also invites them to every meeting of the Eldercare Task Force.

- Maintain a professional image.

According to Riel, "Image is really important. People have a mental image of what a government-funded agency is like. Some businesses might shy away from dealing with them based on an image of a bureaucracy. We wanted to counteract that stereotype and show that we can be professional and offer a quality service. You need to show that you can do things the right way, be timely in your response, and have the right attitude. Many government agencies are very professional, but the perception isn't always there. The best recommendation I have for anyone is to develop a good presentation and have a good quality product."

Among the pluses achieved by the Jacksonville *Florida Partnership for Eldercare* was creating an overall image and carrying it throughout all aspects of the event. This included: giving the breakfast program a theme; developing a logo; using linen invitation cards; creating a "Florida" color scheme to use for all materials; and hosting a breakfast meeting at a well known yacht club. Printed copies of the agenda were placed at each seat with a small gift—a business card holder with their logo, wrapped in the colors of the event.

American Express provided substantial support for the event as a means of informing other businesses about the need and importance of eldercare. Other areas, however, may not have this level of sponsorship.

Northeast Florida Area Agency on Aging [cont.]

- Link with an established event.

Whenever possible, try to participate in existing conferences and workshops sponsored by well established business groups and associations, or find such a group to co-sponsor your event. A great deal of the AAA's success had to do with the fact that American Express had always had a highly regarded breakfast forum during the Week of the Working Parent, so this event was part of a long-standing tradition with a built-in audience. This was the first time, however, that eldercare and aging issues were the focus of that program.

- Have a business orientation.

"AAAs need to develop a business 'mindset' and keep up with what's happening in the world of business," advised Riel. Jacksonville targeted a keynote speaker who was a businessperson and could speak on why eldercare is a business issue. Riel also subscribes to all the business and Chamber newsletters. She watches for news of what company is active in childcare (a tipoff as to who might be interested in eldercare), and for general business news.

Cortland County Area Agency on Aging

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Background

With a grant from the State Office on Aging, Cortland County has been raising employer awareness of eldercare issues by sponsoring two newsletters (one for employers and one for caregivers), giving on-site employee seminars, and maintaining a resource center. In conjunction with a non-profit child development program, they also are sponsoring a public/private Dependent Care Coalition with the ultimate goal of developing an intergenerational day care program.

Highlights of What They Learned

- Raise awareness of eldercare as a "hidden" issue.

Since many employees still don't talk about it, Hansen noted that many employers don't yet understand eldercare is an issue. Therefore, at the first Dependent Care Coalition, she talked about how it's a hidden issue. The employers responded, "You know, you're right. We're not hearing about it, but we know it's there."

The AAA also did an employee survey to bring the issues out, and the agency stresses the hidden nature of this issue in newsletter articles.

- Use employees to develop surveys.

They asked members of their Dependent Care Coalition to appoint and give release time to two or three employees to be part of a survey development task force. These employees met as often as once a week throughout the winter in order to brainstorm the issues faced by employed caregivers who must grapple with childcare and eldercare. Hansen felt this process resulted in a more in-depth survey and ensured more "buy-in" by the employers.

- Persevere and listen.

According to Hansen, you can't just go in and force your services on employers. You have to work with them in a constructive way.

"Employers are very task-oriented," says Hansen, "You have to know when to back off. You also have to recognize the economic situation. You have to be aware of what's going on in the community and what's on their minds—if they're going to lay off half their workforce, for example."

- Use videos, but protect your investment.

"The [caregiving] videos [that we have] are especially well received. We use them in workshops and support groups, and many people check them out for individual use. Since videos are costly, we protect our investment by making a copy of the original. We send a letter to the college communications department and ask them to make a copy. We explain in the letter that we understand about copyright laws and that we pledge that the original will be kept in a locked file cabinet and that only the copy will be loaned out."

Northeastern Illinois Area Agency on Aging

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Background

Northeastern Illinois AAA in West Chicago is raising employer awareness one meeting at a time. These meetings are solicited by AAA letters to the CEO and/or human resources professional.

Highlights of What They Learned

- Research your corporate prospects.

"We've used many different resources. Recently the newspaper had an insert of the top 100 local companies, and we used that. We've researched the Donors Forum which lists IRS information and includes biographical sketches of top management. We research through different means to find out as much information on them as we can," says Kobitter.

Kobitter recommends reading the business pages in your local newspapers and subscribing to business publications. For instance, the representative from Platinum Technologies was impressed when she mentioned she read a profile of them in the business pages. "It's like preparing for an interview, doing your homework on them," says Kobitter, "It can be very time-consuming, but we're hoping that it pays off."

Kobitter called every company to make sure names and titles were correct before she sent out the letters. "We want to make it as personalized as possible. Our research enables us to include some pertinent information in the letter, such as how many employees they have, which demonstrates we know something about their business. Try to find companies who are a little more paternalistic. Find out if possible their pattern of corporate giving—if it's aging, education, or not-for-profits, those are good signs."

- Be patient and aware of corporate bureaucracies.

"It's hard getting corporate approval," notes Kobitter, "It takes several different levels. It appears that corporate departments are struggling internally to maintain their budgets. We truly feel that we won't see the results of any work we're doing now until next year."

- Join business groups.

"The other thing we have done very recently that has helped elevate our visibility and improve our credibility is to join business groups such as the Society of Human Resource Professionals and the East-West Corporate Corridor Association. Membership gives us the right to serve on committees to provide input into some key issues. The more we're actively participating, the more people will know us. It increases your visibility, and it helps expand the concept of work-family from just childcare to include eldercare."

- Think carefully about freebies.

"We worry about the complimentary handouts we give at face-to-face meetings. Do companies just pass them out to their employees and then don't need us anymore? A couple years ago we met with a hospital and gave them a lot of materials. Six months later they announced their own program, and it was very similar to the materials we'd left with them."

Atlanta Regional Commission

Aging Services Division
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Background

In cooperation with Downtown Atlanta Senior Services, ARC, IBM and a number of other organizations co-sponsored a half-day seminar, entitled, "Caregiving: Its Impact in the Workplace." Eighty businesspeople and social service representatives attended.

Highlights of What They Learned

- Educate the employer before the event.

"In a number of cases, eldercare is a very new concept," observes Schramm. "An employer may not have identified with the concept and so may not have followed through with an action plan after attending the seminar."

In response to this possibility, a teaser survey to determine interest in eldercare has been sent to a number of employers in the region, many of whom attended the seminar. The survey cover letter references the eldercare conference in 1992 and announces the 1993 conference. The survey packet also includes an article about eldercare taken from *Fortune* magazine.

- Two mailings are better than one.

"For 1993, we are sending two mailings—one eight weeks ahead, then a follow-up four weeks ahead. We have found that with just one mailing, the invitation often gets lost or otherwise overlooked. Two mailings makes it easier to remember and increases participation."

- Involve businesses in the planning.

"The more you work through business to market the concept, the more opportunities you'll have to attract other businesses. If we would not have had this corporate sponsorship, other businesses might not attended. In fact, at one of IBM's meetings, they helped market the conference and handed out the brochure to other corporate representatives. It lends more credibility for the whole concept. If you have one company, you can usually attract more. In addition, each person on the planning committee used their own mailing lists, which resulted in very broad coverage."

- Remember small businesses.

At the conference, we had a "showcase" of exemplary business eldercare policies and programs. However, it only highlighted large corporations. "Next time," says Schramm, "We're going to make sure the showcase includes small employers, and we hope to recognize both a large and a small business for excellence in eldercare."

Elder Services of the Merrimack Valley

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Contact:

Anne Proli

Corporate Relations Manager

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Background

To "demystify" the corporate world and better market their eldercare services, Elder Services of the Merrimack Valley (ESMV) formed an Eldercare Advisory Committee.

Highlights of What They Learned

- Use the Advisory Committee as a Sounding Board

According to Anne Proli, Corporate Relations Manager of the AAA, "There are many good reasons for an advisory committee: it gives you needed feedback to avoid developing products or marketing materials in a vacuum. You may be on the right track—but checking with others can broaden your vision and affirm what you are trying to do, and that can be very helpful."

Proli consults the Advisory Committee about everything she is doing, from the development of the brochure, to a marketing plan, to the layout of the marketing materials.

Advisory committee members also can serve as contacts when you are reaching out to new corporations and help legitimize your eldercare program. "So and so gave me your name—they serve on an advisory committee for our eldercare program and said you might be interested in hearing about the services we have to offer," comments Proli.

- **Maintaining relationships is important.**

Proli says, "The products we have sold have been influenced by the agency's personal relationship with corporate benefit managers. You can have the best proposal in the world and great products, but the competition can be very tough. It's the old story of who you know versus what you know. In one instance, I feel that the company bought our products because of the personal relationship that had been established—and they were confident that we would go the 'extra mile' to make sure that they were satisfied."

- **Bartering builds relationships.**

"Bartering of services with companies who aren't willing to pay or can't afford to pay can help establish a relationship—and may lead to future contracts that are worth money."

For example, Proli provided one free session on pre-retirement planning to one corporation as a "thank you" for their benefit manager's participation on ESMV's advisory committee.

- **Keep the committee small.**

"Keep the committee to six to eight members. That allows for more intimate relationships to develop. One of the charms of the non-profits is the personal nature of how we work. Keeping the advisory committee small allows for a nice mix of personal style and professional effort. In a smaller group, people tend to connect with each other more—and open up in the sharing of information."

- **"Homespun" is O.K.**

Proli was afraid her marketing materials looked too "homespun." The advisory committee felt differently and encouraged her to avoid being "too slick" with her marketing materials because companies might equate slick with expensive. "They helped me to realize that homespun does not mean unprofessional."

- **Timing (and food!) are important.**

She wishes that the committee met more often to help build upon the relationships that have been established. "Breakfasts or lunches are the best times to hold meetings—after all, everyone has to eat." Proli conducts the meeting while people are eating—to show sensitivity to their time pressures and to get the business completed as quickly as possible.

Elder Services of the Merrimack Valley [cont.]

- Have an understandable name.

Originally ESMV used the "Life Planning Program" as the title for their eldercare services. However, when they went out to recruit members for the advisory committee—or to try and sell any products—people didn't know what "life planning" meant. They switched back to the Eldercare program to make it more understandable to their audience.

- Help employers who need help.

One large corporation decided it didn't need eldercare because it had two poorly planned events that were not successful (a poorly designed employee survey and a health fair put on by staff who saw it as a burden). In retrospect, Proli wishes she had provided more assistance to this employer to make sure these projects were successful.

- Start with an overview of your agency.

One advisory committee member said, "I don't know what you (Elder Services) do." That person had been aware of the agency for five years. Proli says she should have started by giving an overview of the agency's operations and the aging network. This would have given committee members a broad sense of perspective about their committee involvement.

ElderLink—an affiliate of Somerville-Cambridge Elder Services

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Contact:

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Background

ElderLink held a breakfast forum on "Changing the Corporate Culture" for 35 business people in 1991.

Highlights of What They Learned

- Choose a "hot" topic.

The goal was not so much to raise awareness of eldercare issues (their area is fairly sophisticated on the issue) as to "get our name out there" and make contacts for future marketing prospects. A previous program on legal issues attracted no interest.

Corporate culture happened to be in the news a lot, so they thought that would be a timely topic. "The broader topic was the best way of grabbing people's attention," says Partridge. "It has to be related, though. It was a little bit more roundabout, but that's really why the people came. If we said, 'We're going to talk about eldercare,' people would have gone, 'ho-hum.'"

- Have a date by which people should RSVP (but follow up!).

"We didn't put a return date on our RSVP and that was a mistake. We didn't hear from people until the week before the event." When invitations are sent to a large number of potential attendees, Partridge recommends calling people who previously expressed an interest and those with whom you already have a relationship.

- Get a good moderator.

"You need to have a strong moderator for a panel. If you don't, someone will go off on a tangent or the last person will get short shrift timewise."

Fairfax County Area Agency on Aging

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Background

In late 1989, at the AAA's recommendation, the County Board of Supervisors appointed a 26-member, public/private Corporate Eldercare Task Force to examine the eldercare needs of Fairfax businesses and make recommendations to address those needs. The Task Force, with the approval of the Board of Supervisors, evolved into the permanent Corporate Eldercare Consortium. This group currently consists of a nine-member Steering Committee seeking to expand its membership and accomplish certain self-defined tasks.

Highlights of What They Learned

- A volunteer management team can have advantages.

One unusual aspect of this Consortium is its reliance on a volunteer management team. The team does much of the planning and development work for the Consortium. Currently five members, it is made up of retired private-sector executives and younger volunteers with backgrounds in gerontology. Team members were recruited through volunteer clearinghouses and the retirement programs of the participating companies. Job descriptions were drawn up, and team interviews were conducted.

The volunteer team builds on the AAA's long-standing philosophy that older persons are resources. "Several of the team members are people with a good deal of experience in the private sector, which is not always something that people in government-linked AAAs have," Neuschatz notes. "That, combined with the knowledge base of the AAA and the diverse experience of team members, has proved to be a real dynamic combination in terms of ideas on how to do things. It's been a really exciting experience."

Neuschatz recommends holding regular meetings. When their meetings were quarterly or less often, attendance dropped off. When they had an intern available, they counteracted long periods between meetings by having the intern call and bring people up to speed and ask what was going on in their organization.

Another tactic Neuschatz advocates is giving business members specific tasks. "They are a working group and like getting things done. They get unhappy when they're neglected for long periods of time," she says.

They also developed a briefing packet and have a private breakfast or lunch meeting to help get new members oriented.

- Commit staff and resources.

Neuschatz notes that development and maintenance of a business advisory committee requires a long-term commitment of staff and resources from the AAA.

"That's an issue for AAAs—it takes an enormous amount of staff time, and you have to look at your commitment down the road. In order to have an effective management team, you have to provide them with an effective environment—which means a commitment of space, equipment, supplies, etc. When you recruit a core of enthusiastic businesspeople, they do generate work! It really requires a high level of commitment."

- Get political and business elements to "buy in."

An important aspect of developing their business advisory committee was gaining support and endorsement of high level local political and business leaders. The Board of Supervisors approved and endorsed the creation of the group; the invitations to participate on the initial Task Force were sent by the County Executive. Key leaders in the local business community were recruited early, providing visible endorsement to other businesses.

- Strive for a diverse membership.

The Fairfax County AAA succeeded in attracting a broad range of employer support in terms of industry, size, public/private, profit/non-profit, etc. Neuschatz adds it was difficult to keep small businesses (ten employees or fewer): "Because they're small, it's a much larger commitment for them to participate in a morning-long meeting. And with the recession, it was even harder for them to maintain involvement."

Statewide Coordination and Marketing

For the majority of the state associations without paid staff, the "lead agency" model is perhaps the only way many states will be able to initiate and sustain [an employer eldercare] effort.

Within every state, there are employers with multiple branches or offices. Banks, retail establishments, utility companies, school systems and county government, for example, employ hundreds of workers at several sites. Often, an employer must make an employee service available at all of its locations or at least at a convenient regional center.

In situations like this, a single AAA may be unable to meet the needs of an employer with multiple sites. Statewide coordination will be required to establish a system of employer eldercare services that is consistent around the state, provides quality assurance, and overcomes turf issues. This chapter examines the advantages and disadvantages of a state association model in coordinating an employer-sponsored eldercare program. The perspective is drawn primarily from the experience of Mass Home Care, a state association of home care agencies and Area Agencies on Aging, which began such an effort in 1990.

At present, there are 38 state associations of Area Agencies on Aging in the nation. State associations vary as to their organizational structure, dues, frequency of meetings, and the priority issues they consider. A large percentage of association time is devoted to state legislation and budget issues. Many associations also sponsor training programs, publish newsletters, and are involved in promotional activities of one kind or another.

For the majority of the state associations without paid staff, the "lead agency" model is perhaps the only way many states will be able to initiate and sustain this type of effort. In this arrangement, all of the AAAs in a state agree to be represented by one point of contact with employers. The lead agency coordinator could be a part-time person, preferably in an agency experienced in the employer eldercare arena. Participating AAAs could pay annual dues to fund the position. The agencies determine budgets and expenses and whether funds are sufficient to support a full-time or part-time position. Day-to-day supervision would be carried out by the lead agency with overall program management provided through regular meetings with member agencies.

State Agencies on Aging Provide Oversight and Support

Chapter 1 described the monitoring and oversight responsibilities of the State Agency on Aging with respect to the employer eldercare activities of AAAs. Another role the State Agency can play is that of a facilitator of public/private partnerships. For example, in Massachusetts, three roundtable breakfasts were held in different regions of the state co-sponsored by the Executive Office of Elder Affairs and the Executive Office of Economic Affairs. These breakfasts showcased speakers from the AAA network, as well as members of the corporate community who have implemented employer eldercare programs. The success of these roundtables was evident by the attendance of forty to sixty people at each session.

State Agencies on Aging in Illinois, New York and South Carolina also spearheaded efforts to build employer awareness and actively involved AAAs in the planning and follow-up. State Agencies on Aging, with links to the governor's office and other departments, carry a level of clout and influence that attracts business attention in ways that benefits local agencies.

Other ways a State Agency on Aging can reach out to the private sector include:

- Forming an advisory group of AAAs and local businesses to address the eldercare issues faced by employed caregivers.
- Organizing training sessions to educate AAAs in how to "market" their services to populations other than those traditionally served such as working caregivers).
- Conducting special events across the state as a way to increase visibility for the network.

Overview of the Mass ElderCare Program _____

Mass Home Care consists of 23 Area Agencies on Aging, most of which are also Home Care Corporations, funded by the state to provide case management services to approximately 33,000 elders per month. In June, 1990, after almost two years of planning, the Association (at the request of its member agencies) initiated a statewide employer eldercare program. The Association membership voted to make the program, known as Mass ElderCare, a priority and devoted resources to fund the effort. The goals of Mass ElderCare are:

1. To enhance the visibility of the aging network.
2. To reach out to new populations not traditionally served by the aging network.
3. To diversify funding sources for the aging network and develop new revenue streams.
4. To offer consumers services not previously available from government-funded programs.

AAAs must do three things in order to become a member agency of the Mass ElderCare program:

- Pay annual dues to support the development and marketing activities of the program.
- Sign a partnership agreement outlining the roles and responsibilities of the Association and its member agencies in the daily operation of the program. This agreement helps to facilitate a coordinated effort imperative to the success of a statewide program.
- Designate a staff person from the agency to serve as a liaison to the program to facilitate communication among parties.

The first year of the Mass ElderCare program was devoted to the development of employer eldercare products such as workplace surveys, lunchtime seminars, telephone consultation services, caregiver newsletters or "tip" sheets, and resource manuals. Marketing activities commenced during the second year of the program. Thus far, Mass ElderCare member agencies have worked with more than a dozen companies. The knowledge gained from experience during the initial two years of the program is detailed in this chapter.

State Agencies on Aging, with links to the governor's office and other departments, carry a level of clout and influence that attracts business attention in ways that benefits local agencies.

Getting a Statewide Program Off the Ground

Step One: Staffing the Project

To perform the multitude of tasks involved in a statewide initiative, it is important to have one person in charge of the program. The program budget approved by the Association included funding to hire a full-time director of products and marketing. In the "lead agency model," these tasks could be performed by staff of the lead AAA for the state network. The variety of tasks performed by the director of products and marketing can be separated according to the two major components of the position: program development and marketing.

Program Development:

- Survey the network to determine statewide service capacity.
- Facilitate employer eldercare product development, such as seminar curriculum, resource manual, and caregivers' "tip" sheets.
- Develop protocols for program development and quality assurance.
- Coordinate agencies in the provision of employer eldercare services.
- Facilitate communication among member agencies.
- Meet with member agencies individually to provide technical assistance in the areas of program development and marketing.
- Meet with agencies collectively to share information and keep the project moving forward.
- Organize training for the aging network in such areas as customer service, telephone etiquette, effective seminar presentations, marketing strategies, etc.
- Act as a clearinghouse for collection and distribution of relevant information and materials to the network.

Marketing:

- Develop marketing materials and strategies.
- Compile a database of companies throughout the state.
- Lead and/or participate in sales calls and marketing meetings.
- Write proposals to companies and follow up on corporate prospects.
- Negotiate contracts between companies and member agencies.
- Represent network at events, meetings, and conferences.
- Make presentations to employer groups, associations, and chambers of commerce.
- Organize special events to increase visibility of program.
- Encourage media to write feature articles on the need for services for working caregivers.

...during the initial year of any program, product development should be the top priority, and assessing the statewide network's capacity to deliver high quality services to corporate clients is the first order of business.

Step Two: Developing the Products

Before any marketing begins, employer eldercare products must be developed. Therefore, during the initial year of any program, development should be the top priority, and assessing the statewide network's capacity to deliver high quality services to corporate clients is the first order of business. In Massachusetts, a few agencies have been providing eldercare services to companies since the mid-1980s. These agencies were willing to share their knowledge and expertise for the benefit of the network as a whole.

Using a Request for Proposal shortens development time. Certain Mass ElderCare member agencies were selected to develop specific products and services, such as surveys, seminars, resource manuals, and caregiver newsletters. An RFP is sent to the member agencies who respond with a proposal to develop the product and share it with the rest of the network in accordance with the product protocols set forth. A committee of peer agencies reviews the proposals and then votes to award the project to the most qualified agency. Selected agencies are reimbursed to develop and periodically update employer eldercare products. This process not only ensures a high quality employer eldercare program, it also addresses the issue of proprietary products and services.

Program development requires an initial outlay of staff time and resources. Some of the annual membership dues for the Mass ElderCare program were budgeted for program development. However, additional funding was sought to produce seminar curricula and caregiver newsletters. Grant proposals were submitted to foundations and other potential funding sources. The proposals specifically requested funding for program development. Other grant awards have been made to the program, some in the form of in-kind gifts and donations. For example, a local advertising agency performed creative work for the program on a *pro bono* basis.

The process of product development is not complete without a thorough testing of the product or service before it is offered to the marketplace. Mass ElderCare seminar speakers, for example, are evaluated by various groups, including some boards of directors of member agencies. The Mass ElderCare workplace survey instrument was pre-tested at a member agency so the "bugs" could be worked out before it was used for a corporate client.

Mass ElderCare developed the following menu from which companies can purchase services:

- Workplace Eldercare and Dependent Care Surveys
- Aging Information Seminars
- Telephone Consultation and Referral Services
- Workplace Eldercare Consultation
- Private Care Management
- Human Resources, Employee Assistance Program, and Supervisory Training
- Eldercare Resource Manual
- Caregiver "Tips" Newsletter

The process of product development is not complete without a thorough testing of the product or service before it is offered to the marketplace.

Step Three: Setting Clear Quality Standards and Protocols

Companies are looking for high quality services at a fair price. Thus, even if a low price is offered, quality can never be sacrificed. In fact, most companies are willing to pay a higher price if it means receiving higher quality services than the competition offers.

Each product developed for the Mass ElderCare program has a standard protocol describing how the service is delivered. This is important to know before a visit to a company because prospective corporate clients may ask questions, such as "How do you conduct workplace surveys?", "Who does your lunchtime seminars?", or "How does telephone consultation work?"

Answers to these questions should be formulated (graphically whenever possible), and written materials describing the service should be given to the company so that they can better understand the services they are purchasing for their employees. Furthermore, management of a statewide program means dealing with multiple agencies who also need protocols to implement programs on the local level in a consistent manner.

In a statewide program, any AAA's activities for a corporate client reflect well or poorly on the rest of the network. Therefore, a major role of the director of products and marketing is to maintain quality control. The person in this position is responsible for all phases of the program development, from developing products to implementation to program evaluation and refinement.

Developing and Implementing Standards and Protocols _____

Because AAAs do not have substantial resources available for program development, centralization of certain functions allow the entire network to gain access to corporate products without draining agency resources. In this way, certain agencies develop expertise in specific areas, such as survey processing, seminar curriculum, visual aids, and production of written materials. These agencies share that expertise with the rest of the statewide network.

Consider how one agency could conduct a workplace survey to assess the extent of caregiving by employees of the firm. The agency must devise the survey instrument, develop software to analyze survey results, and write a final report to management. Most companies are not willing to pay a lot of money for a survey that is likely to tell them they have a problem and need to spend more money. Therefore, keeping the costs of workplace surveys to a minimum is critical. Survey processing is centralized for three major reasons:

1. Fees for workplace surveys tend to be low, and this product should be seen as a "loss leader"—there being little or no profit in this product. Therefore, the cost of providing the services needs to be kept as low as possible.
2. Turnaround time must be short, usually within one month, when conducting a workplace survey. Most AAAs do not have the staff available to analyze results and write a report within three weeks, in addition to performing their other duties.
3. Centralization ensures uniformity in the final report to management and permits comparisons with other workplace surveys.

Because AAAs do not have substantial resources available for program development, centralization of certain functions allow the entire network to gain access to corporate products without draining agency resources.

Data entry services represent the bulk of costs in conducting a workplace survey. One Mass ElderCare member agency in the central part of Massachusetts has excess computer capacity and a skilled computer programmer; this is the agency that performs computer programming and data entry. Whenever a workplace survey is sold to a company, this particular agency is paid on a per survey basis to perform data entry and produce raw data. The Mass ElderCare director of products and marketing then analyzes the data and writes the final report to management. [Appendix A refers to the protocols for this service, timeline, and other hints for conducting a workplace survey.]

Seminars are a very popular employer eldercare product. Consistency in content and delivery is an important quality control function. For this reason, another Mass ElderCare member agency produces and updates seminar materials according to specifications. Among the materials are:

- A leader's guide for seminar speakers to follow.
- Colorized overheads to use as visual aids for adult learners.
- A bibliography of all the resource materials to be disseminated to seminar participants.

The most important aspect of a corporate seminar is the speaker or seminar leader. It simply does not make sense for each of the thirty member agencies to train speakers when the volume of seminars is low initially.

An example of how the Mass ElderCare Speakers Bureau works is as follows: Early in the history of the program, the director of products and marketing attended a "sales call" with the local agency. The company expressed interest in using Mass ElderCare seminars for their Pre-Retirement Planning Program in three specific areas:

1. Legal Issues: Planning for the Future
2. Paying for Eldercare: Medicare, Medicaid, and Long-Term Care Insurance
3. Financial Planning for Retirement

Although financial planning was not one of the core seminars offered through the program, a good speaker for this topic was identified. Since the local agency did not have speakers trained in the seminar curriculum, they "borrowed" from the Speakers Bureau, paying for the speaker and retaining any excess revenues without a major investment of staff time.

Project Committee Fosters Communication

In order for product protocols to be consistent statewide, Mass ElderCare member agencies must reach consensus on how corporate services will be delivered. Whenever multiple organizations decide to work together for a common goal, communication is a major concern. Some mechanism for communication between all parties must be implemented and monitored over time.

For the Mass ElderCare program, this mechanism is the Project Development Committee which consists of a staff liaison to the program from each of the member agencies. Any communication to local agencies is conducted through the liaison to the committee. The Project Development Committee has two main functions:

1. To help formulate program and policy development to ensure uniformity statewide.
2. To implement the program on the local level according to the protocols approved by the committee.

Benefits

of a Speakers Bureau

- Only exceptional speakers are accepted into the Speakers Bureau, thereby maintaining high quality.
- Using a regional approach, good presenters throughout the state have been accepted into the Speakers Bureau. Some speakers are agency staff. Others are outside consultants.
- As seminar curriculum changes or is updated, only the speakers in the bureau have to be retrained.

To keep the program moving forward in both these areas, regular attendance at Project Development Committee meetings is imperative. During the initial year of the program, bi-monthly meetings were held. The Project Development Committee reviewed draft materials before final products were produced. Once marketing began, however, the schedule of meetings was reduced to a quarterly basis because marketing activities are labor-intensive and time-consuming.

Project Development Committee meetings are a forum for member agencies to become better acquainted and share information about what has been successful and what has not. Since experienced agencies lend their knowledge and expertise to the others, these meetings help prepare all AAAs in Massachusetts to promote public/private partnerships. In this way, the issue of variability is addressed and uniformity in service provision is facilitated.

Implementing a Statewide Program at the Local Level _____

Part of the role of the Project Development Committee is implementation of the program at the local level. Once quality control standards are formulated by the committee, each liaison is responsible for assimilating those standards into the daily operations of his/her own agency. Some agencies request technical assistance from the director of products and marketing in the implementation phase.

In addition to the Project Development Committee meetings, training sessions are also offered to the aging network. If an agency possesses relevant expertise in a particular area, a training session will be offered to the network. Many of these sessions have been videotaped and are made available to the statewide network at cost (\$10). Some of the topics covered to date include:

- How to plan and implement fee-for-service programs.
- The corporate perspective: what are companies looking for from the aging network.
- How to become a better public speaker.
- Proper telephone communication etiquette.

Marketing a Statewide Program _____

While program development must be the first order of business, it really never ends. Yet, there comes a time (after you have tested your products and services) when you must simply begin the marketing or outreach phase. Marketing is critical since companies must first know about your AAA before they can purchase any of the services you offer. During the initial year of the program, Mass ElderCare followed a statewide marketing plan which included these four steps:

Step One: Gather Information on Companies Based in the State

A list of prospects must first be compiled. For the Mass ElderCare statewide program, this meant entering approximately 2,000 Massachusetts-based companies into a computer database. This database generates labels for a statewide direct mail campaign and also can generate lists of companies in each AAA's local area.

Project Development Committee meetings are a forum for member agencies to become better acquainted and share information about what has been successful and what has not.

This information was gathered from three sources:

- Human Resources Associations
- Employee Benefits Associations
- Employee Assistance Program Associations

Membership in these organizations is often a prerequisite to obtaining this information. Contact persons and their titles are included in the database because getting to the right person in a company increases the likelihood of a successful direct mail campaign.

Step Two: Develop Marketing Materials For Statewide and Local Use

Once the corporate database was completed, a bulk mailing was sent to each of the 2,000 companies in the database. The initial "bounce-back" marketing postcard is shown in Appendix B. This piece gave companies the opportunity to show their interest in employer eldercare services by requesting more information on Mass ElderCare's program. While most direct mail marketing typically produces a one to two percent response rate, this initial bulk mailing generated a five to six percent response rate, yielding a list of approximately 120 companies categorized as "follow-up prospects." Companies who return the bounce-back postcard are sent a folder on the program with a cover letter. The cover letter ended with the promise of a follow-up phone call within two weeks to answer any questions about the program.

During the follow-up call, a face-to-face meeting is suggested. So far, Mass ElderCare has met personally with more than sixty companies. These meetings are always attended by the director of products and marketing and a representative from the local Area Agency on Aging which covers the geographic area where the company is located.

Step Three: Prepare for a Meeting with a Corporate Client

Once a marketing meeting or "sales call" is scheduled, there is still more homework to be done. Gathering information about a company's products, operations, benefits, and personnel policies is not easy. The daily newspaper and local business journals can yield useful information. This research is most often performed by the director of products and marketing.

Most human resources professionals will give you a time limit of half an hour to an hour for the meeting. Consequently, knowing exactly what points you want to get across is a key aspect of preparing for a marketing meeting. Some of the potential mistakes that can be made during sales calls include:

- rambling on about available services without listening to the company's representatives and what they are interested in;
- not asking focused questions at certain points during the meeting;
- getting into excessive detail about services so that major points of the presentation get lost;
- talking in human services jargon that companies do not understand; and
- being inflexible and unwilling to modify your services to meet the customer's needs.

4-Step

Marketing Plan

1. Gather information on companies.
2. Develop marketing materials for statewide and local use.
3. Prepare for meeting with a corporate client.
4. Write a proposal and follow-up.

Most AAAs do not have the staff to plan and organize massive marketing efforts, and this is where the statewide program can help.

To avoid these mistakes, a marketing script was developed and is customized with the company's name when a sales call is made. The script provides a structured format that is concise, simple and easy to follow with information presented in "bullet" form. Member agencies often request the director of products and marketing to take the lead during the first few marketing meetings until they get a feel for the script and how to use it. Even when the local directors do not take the lead, however, there is a place in the script for the local agency to describe briefly their organization and its affiliation with the statewide program.

During the meeting the company has an opportunity to express interest in certain products and services offered through the program, and will be looking for recommendations about which services to purchase. In making recommendations, consideration of the company's structure is important. Lunchtime seminars, for example, are not the most cost-effective option for a company with multiple worksites of fewer than 50 employees each. Once information is gathered on company organization and what specific services are needed, the time has come to offer a proposal to the company.

Step Four: Writing a Proposal and Follow-Up

The director of products and marketing usually prepares a proposal which is then reviewed by the local agency before submission to the company. Having the proposal reviewed by the AAA is important, since a goal of the Mass ElderCare program is to "make marriages" between companies and AAAs so that local AAAs become account managers for companies in their area. The director of products and marketing facilitates the "courtship process" and fades into the background once the relationship has been established. The director of products and marketing checks in periodically with the company as a way to maintain quality control.

Enhancing Local Marketing Efforts Through a Statewide Approach

One of the challenges of a statewide approach to marketing is coordinating the effort among various players, namely, the local AAAs. Otherwise, companies are likely to get confused if they receive multiple solicitations from groups claiming to be the same "network" of agencies. Membership in the Mass ElderCare program does not preclude any agency from conducting marketing efforts locally. Mass ElderCare developed marketing materials each local agency can use. Technical assistance is continually provided to member agencies in formulating marketing strategies for their particular region (urban, suburban, or rural).

Most AAAs do not have the staff to plan and organize massive marketing efforts, and this is where the statewide program can help. Regional breakfasts can be co-sponsored by the local agencies and the statewide program. This marketing technique is popular because companies can get acquainted with the aging network and eldercare as a workplace issue without investing vast amounts of resources.

A Partnership Agreement Between Agencies

Coordination of marketing efforts is addressed by a partnership agreement signed by Mass ElderCare member agencies. For example, the agreement stipulates that marketing to companies with multiple worksites and/or more than 500 employees is left to the statewide program. Appendix C is the partnership agreement used by Mass ElderCare.

The issue of multi-site companies is a tricky one. AAAs serving as the account manager to multi-site firms must coordinate service provision in various parts of the state. Since traveling long distances for a one-hour seminar presentation is not cost-effective, it makes sense for the agency to subcontract with the local agency to provide this service. The Speakers Bureau helps to facilitate this process. The director of products and marketing works with member agencies to coordinate other corporate services in various regions of the state.

Service coordination throughout the state is outlined in the partnership agreement, but not all situations can be anticipated. Some flexibility should be maintained. The first few contracts will "test" whatever previous agreements and models have been set forth between member agencies. Amendments to the partnership agreement can be drawn up as program policies are tested, adjusted, and become institutionalized.

Pricing Your Products and Services

When costing out any service, the various components of that service must be broken down into unit costs. For a corporate service like a seminar, the component costs would include:

- Labor involved in providing the service (the bulk of the costs)
- Number of presenters
- Time frame for the session
- Number of people attending the seminar as back-up and support
- Overhead/administrative expenses
- Number of people expected to participate
- Cost of materials given out during the session

Adding all these separate costs together will yield a total cost for the seminar. A profit margin of 10% to 20% can be added to the fee prior to quoting it to the company. Knowing the base cost is important since it allows you to negotiate with a prospective corporate client and not lose money. At first, you may have to underprice your services as a trade-off for getting into the market.

The Unscientific Method of Pricing

The fee charged for a service must cover the costs of providing that service. You will lose money if you price your service too low to cover your costs. Conversely you will not get any business if your price is too high for the market to bear.

To avoid either of these situations, market research should be performed before setting your price. Information on competitors' charges for similar services is not easy to obtain, but it is powerful information to use in pricing your own services.

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Negotiation is the key to getting the best possible price for your product. Always give employers options on prices.

The bad news on pricing your products and services is that even when you have done extensive market research to determine the "going" price for employer eldercare services, there is no scientific method for pricing. Some companies, especially small and mid-size companies, are very "price-sensitive"—they are looking for value and probably not willing to pay the high end of the price range for a particular product or service. Remember, the higher the price of a service, the higher the expectation of that service.

Negotiation is the key to getting the best possible price for your product. Always give employers options on prices. Let your prospective corporate client know you are willing to customize the "package" of services to meet the needs of that organization. Emphasize the greater the volume of service purchased, the lower the per unit cost to the employer. For this service, a per employee fee is generally charged. Most employers today, however, are not ready to purchase a comprehensive eldercare program, and many companies want to purchase services separately on a per-use basis.

When asked to quote a price for a Mass ElderCare Workplace Seminar, a range is always given, such as "between \$300 and \$400 per one-hour session." The company will indicate if the range is acceptable. Whenever possible, try to "bundle" services together to secure the greatest volume by the purchaser. For instance, the three most popular Mass ElderCare seminars are offered in a package for \$1,000.

Program Evaluation

An evaluation mechanism must be developed for each employer eldercare product. Questionnaires are the simplest and easiest way to gather feedback. An evaluation form should be developed for each service, along with a protocol for how and when the questionnaire is to be disseminated and collected. For seminars and telephone consultation, evaluation should be performed after each presentation or contact. In the case of seminars, an evaluation form is included in materials given to attendees at the end of the presentation. The speaker asks participants to fill it out and hand it in.

The director of products and marketing for Mass ElderCare attends most corporate seminars and compiles the evaluation report for the company. Sometimes the company or the AAA prefers to compile the information; usually this should be part of the planning process before the seminar is conducted. Appendix D is a sample seminar evaluation report. Mass ElderCare speakers also receive a copy of the corporate evaluations and use the feedback to improve their presentations.

Using Feedback to Improve Products and Services

Program development never really ends. As the program grows, services should be refined to provide the best possible service at the lowest possible price. Any feedback received should always be reviewed and assimilated into the program. For example, in seminar evaluations, the question is asked, "What was the least helpful topic of the seminar?" If participants consistently rate one particular topic under this category, then dropping that topic should be considered.

Feedback from the corporate representative must be gathered and reviewed. When the seminar evaluation report is sent to the corporate contact, a corporate evaluation form is included in the envelope with a self-addressed stamped envelope in which to mail the form back (see Appendix E). Companies do not have to fill out the corporate evaluation form, but are encouraged to offer feedback. Providing the corporate contact with the opportunity to give his/her impressions of the session can be your best marketing tool and a way to ask if the company is willing to give references on the program. References from corporate clients can be included in business proposals and in marketing materials for the program.

What Gets Reported Back to the Company _____

Utilization reports can be used to evaluate the success of an employer eldercare program. They are used when companies purchase a service package which includes telephone consultation. Utilization reports should present information in three categories:

1. The number and nature of promotional activities which help to market the program internally, such as:
 - Payroll staffers explaining how employees can access the services
 - Flyers posted on bulletin boards
 - Table tents in the cafeteria
 - Information tables at the workplace to facilitate personal contact with employees
 - Articles on aging issues and eldercare in the employee newsletter
2. The number and nature of group activities and the number of employees attending. These activities would include:
 - Seminars
 - Caregiver/Health Fairs
 - Support groups
3. The number and nature of the calls for eldercare telephone consultation. Detailed information does not have to be presented here. The company usually wants to know the following:
 - Number of calls
 - Number of opened cases
 - Number of re-opened cases
 - Nature of the problem

One could also include a case example which occurred during the reporting period, as long as confidentiality is not compromised in any way.

Utilization Reports Help Market the Program _____

Utilization reports are a good way to assess how the public/private partnership is going. The company and the agency must be willing to work together consistently to promote the program to generate high utilization. If the number of attendees at a seminar is low, or the telephone consultation calls are not coming in, look at how the program is being marketed internally to employees and consider changing or simply increasing promotional activities. It is important to remember that eldercare must compete with other personnel issues on the agenda and gain visibility as a workplace issue.

References from corporate clients can be included in business proposals and in marketing materials for the program.

Summary

As with any new initiative that changes the way things are done, there are pros and cons to the state association model. Fortunately, in this case, the advantages have the potential, over time, to counteract the disadvantages.

Advantages of a State Association Model

The primary advantages of a statewide employer program include:

Pooling of Resources and Expenses

Any start-up venture requires an investment of resources; program development is costly not only in terms of money, but also in terms of staffing and overhead. The cost of developing an eldercare program can be prohibitive for an individual agency. The Association devised a first-year budget of approximately \$100,000. To reduce costs, members of the Mass Home Care Association contributed approximately \$2,300 in annual dues for the initial year of the program and \$1,700 for the second year. Mass ElderCare spread development costs over several agencies and passed the savings on to clients in the form of lower charges and fees. This gave the Mass ElderCare program a competitive edge over higher priced service providers, a distinct advantage in difficult economic times.

Product Consistency and Quality Assurance

Companies want an outside vendor to provide high quality services at a fair price. For companies with multiple worksites, it is especially important that a particular service, such as a seminar, be consistent from place to place. Operational protocols should be developed to promote maximum uniformity. Consistent products and quality assurance can be effectively addressed by statewide programs.

Coordinated Marketing

Another major advantage to a statewide program is in marketing, which is expensive and time-consuming. Most Area Agencies on Aging do not have the staff capacity to undertake a comprehensive and sustained public relations or marketing effort. A statewide marketing effort can enhance the visibility of the network as a whole and provide support and technical assistance to agencies at the local level.

Advantages

of a State Association Model

- Pooling of resources and expenses
- Product consistency and quality assurance
- Centralizing of operations
- Coordinated marketing
- Name recognition
- Attractiveness to regional markets

Name Recognition Strengthens the Network

Name recognition among target markets is an important goal in marketing employer eldercare programs. With 23 AAAs under one name for the statewide program, name recognition is more easily achieved. A statewide approach to employer eldercare programs can strengthen the AAA network. However, like any market-oriented venture, it requires an honest evaluation of an organization's strengths and weaknesses compared to its competitors. One of the strengths of the AAA network is its agencies speak the same language and offer the same basic package of services to older persons and their families. Stronger communication links in the AAA infrastructure can only enhance its ability to serve a burgeoning elderly population in the decades to come.

Attractiveness to Regional Markets

Many companies large enough to invest in an employer eldercare program are multi-site firms. These firms look for vendors who have consistent, regional capacity to meet their organizational needs by delivering uniform high quality services at each worksite. A statewide program can coordinate service delivery among member agencies in different geographic locations.

Disadvantages of a State Association Model

Turf Issues Remain

In spite of the many advantages of a statewide program, certain disadvantages exist. Multi-site companies are not organized according to the AAA Planning and Service Area. The statewide Mass ElderCare program evolved from tensions created when agencies provided services to multi-site companies without inviting the local agency to participate. Just as important as the revenue generated by corporate contracts is increased visibility for the AAAs in the communities they serve. The partnership agreement stipulates that when an agency provides a seminar for a company outside its catchment area, the local agency is also brought in to be introduced and offer its brochures to the employer.

Uneven Participation and Benefits Across the State

It is impractical to expect 100 percent participation by the AAAs in a state. Some agencies may not participate due to a lack of businesses in their area, particularly agencies located in rural areas. Agencies may not collaborate for fear of losing their autonomy. In addition, if an AAA is more advanced than others at the start of a statewide effort, it may be reluctant to lose its identity within a larger context.

Disadvantages of a State Association Model

- Turf issues remain
- Uneven participation and benefits across the state
- Service variability and capacity among agencies
- Negotiating agreements over revenue sharing

The goal remains to obtain some business for all member agencies.

Moreover, agencies who have already invested substantial time and resources into developing employer eldercare products may not be willing to share their proprietary materials with the rest of the statewide network. This self-defeating attitude forces AAAs to compete with each other and weakens the network as a whole. However, given the proper inducements, such as monetary or public acknowledgement of some kind, an individual agency might participate in a statewide employer eldercare program, especially under a lead agency model for a statewide program.

Even for agencies whose PSAs are fertile with corporate prospects, the benefits will be uneven. Some companies are ready to make a substantial investment in their workforce. Other firms may only purchase a seminar or two, while more firms are only beginning to explore the issue. Consequently, some agencies in Massachusetts have realized substantial benefits from membership in the Mass ElderCare program, and others have not. The goal remains to obtain some business for all member agencies.

Service Capacity Variability Between Agencies

Service capacity variability among AAAs is one of the biggest disadvantages of the network as a whole. AAAs across the country are structured differently from region to region. Some are private non-profit entities capable of acting autonomously, while others operate as part of county, city, or regional government. For some AAAs, employer eldercare has been a high priority, while for others, only a marginal activity or none.

Operations and management staff also contribute to variability among agencies. Even though AAAs are mandated to provide the same basic services to the elderly and their families, how those services are delivered can vary widely.

In the area of employer eldercare, the agencies in Massachusetts are at different stages of readiness in dealing with the private sector. Some have worked with businesses for many years and are able to manage corporate accounts with very little assistance from Mass ElderCare. Others require a great deal of technical assistance in approaching the private sector.

Sharing Revenue

The partnership agreement of Mass ElderCare stipulates the revenue to be shared by AAAs who work jointly on corporate contracts. For instance, when a member agency "borrows" a good speaker from another agency, the revenue generated must cover speaker costs, as well as agency overhead. Although the Mass ElderCare partnership agreement generally uses percentage formulas for revenue sharing, what has more often transpired is negotiation between agencies because corporate contracts vary in terms of fees and amount of service, making it difficult to devise equitable revenue formulas for every possible scenario.

Highlights of What Mass ElderCare Learned

- **Set realistic objectives.**

Although public/private partnerships represent a tremendous opportunity for the aging network, the concept is still in its infancy, and there is plenty of room for experimentation. Like any business venture, it is easy to set high goals and expectations for an employer eldercare program. Most AAAs who have been active in this area will tell you that companies, especially during a recession, are not buying "large" service packages. In fact, they will usually tell you that it's a lot harder than originally anticipated; lead time and marketing extend much longer than expected, and profit margins are considerably lower than projected. However, these are the realities of developing "market-oriented" programs and should not deter AAAs from stepping into the arena.

- **Success breeds success.**

In general, program development can take up to a year, and marketing must be continuous. However, once your program gains visibility and, more importantly, credibility in the local area, the potential for success is there. Companies talk to each other; companies pleased with the quality of the services received are likely to recommend your program to their colleagues. As we all know, "word-of-mouth is the best form of advertising." Mass ElderCare receives many referrals from companies.

During marketing meetings, companies may ask for a client list. For proposals to companies, include references from companies and the contact people to call (after getting approval to use them as a reference, of course). A statewide approach helps here too because it is possible to cite all the companies that Mass ElderCare member agencies have worked with in order to have a longer client list than any one agency would have alone.

- **Marketing is a management philosophy.**

Marketing of your agency's eldercare program, whether individual or in partnership with other AAAs, is more than just a set of distinct, though related activities. Marketing must be part of the agency's general philosophy of operations.

Ben Abramovice is the executive director of the Laguna Honda Hospital in San Francisco, one of the largest long-term care facilities in the United States. Abramovice said this about marketing:

If we look, however, at marketing as a project that must take place at only certain periods of time, it ceases to become defined as management philosophy and assumes a much less significant role in the efforts of any organization to render its service successfully to a defined community. In other words, this definition of marketing is: the effort of bringing your services, which are presumably the right services to the right user at the right place, at the right price; and that if this is your intention as an organization, marketing must be an ongoing function. So by definition, we have defined what marketing is in long-term care.⁸

- **Build relationships with employers.**

Building relationships with the private sector is a key aspect of marketing. A sense of mutual trust and credibility is important to establish with a prospective client, yet these relationships take time to develop and nurture. If an AAA does not have a long-term time horizon, the success of the program could be jeopardized.

Most AAAs who have been active in this area will tell you...that it's a lot harder than originally anticipated; lead time and marketing extend much longer than expected, and profit margins are considerably lower than projected.

For instance, an agency that has invested considerable time and resources into an employer eldercare program might feel pressured to "make sales" which could negatively impact the process of building relationships with prospective clients. Moreover, most companies are at the stage where information about eldercare as a workplace issue is really what they're looking for.

Consistently sending companies information to keep them informed about the issue is likely to pay off in the long run. Information that might be of interest to them includes:

- Articles from business journals on the subject of eldercare as a productivity problem.
- Invitations to breakfasts, roundtables, or other special events where the subject of aging, long-term care, and demographic trends that may affect the labor force will be discussed.
- Marketing information on your program, new products, new studies, etc.
- Concrete information on community resources and services that can be passed onto the working caregivers at the company.
- **Taking the long-term view starts at the top.**

In order for public/private partnerships to be successful, upper management must be supportive of the concept from the beginning. That support may be tested, however, when the agency discovers that companies are not banging down the door to collaborate with the public sector. Therefore, the commitment from upper management to keep the project going over the long run will usually determine the ultimate success of the program. Because there is no roadmap to follow in establishing public/private partnerships, upper management must also be willing to take risks along the way, to be flexible and try new approaches when something isn't working, and to keep the project going until that first critical success is achieved.

- **Something always leads to something else.**

Many of the AAAs in Massachusetts have recognized the cliché, "something always leads to something else," which is especially true when it comes to public/private partnerships. Even if a company doesn't purchase employer eldercare products for their workforce, they may do any of the following:

- Refer employees to your agency as needs among employees arise.
- Be willing to serve on an advisory board.
- Get involved in a community event sponsored by your agency.
- Volunteer at your agency or start a volunteer drive at the company.
- Participate in an older worker program sponsored by your agency.

Public/private partnerships can take on many forms. The only constraints appear to be the creativity and willingness of both sectors to identify areas of mutual interest and work together to bring action and resolution to those concerns.

In order for public/private partnerships to be successful, upper management must be supportive of the concept from the beginning.

Positioning Your Agency as a Preferred Provider

Positioning is a marketing term defined as finding and establishing your agency's niche or unique role among employers in the community, determining how you want to be seen, and communicating a clear image of your agency through consistent messages and the delivery of high quality services. Not all Area Agencies on Aging, however, will provide eldercare services directly to employers. AAAs that provide no services directly may still function as enabling agencies, seeking to coordinate, strengthen, and support the role of service providers. AAAs acting in this capacity are viewed as brokers, bringing interested parties together, to work out a solution to a common problem. Agencies serving as "brokers" shift the focus to the service provider as the "preferred" partner to the business community.

In other areas, AAAs do provide services directly to employers. A positioning strategy is needed by both types of agencies to establish credibility with employers. This chapter suggests ways that your agency can determine and communicate its position to the marketplace. Sample marketing materials illustrate copy points that can be adapted for brochures, letters, fact sheets and other materials.

The goal for agencies who broker initiatives with the private sector is the same as for agencies who provide services directly to employers: to address the needs of older persons by developing supportive services for family caregivers. Whether your agency is a broker or a provider, you need to communicate a rationale for an employer to value your agency's expertise and resources. In marketing terms, this is known as "positioning the agency"—a process that lets you distinguish your agency from the competition in order to be the "preferred provider" of eldercare services to employers in your area. Positioning aims to educate employers about the differences between alternative providers.

Armond Lauffer, who has written on the subject of strategic marketing for not-for-profit organizations, summed up the concept of positioning this way,

In relating to each of your organization's markets, it is important for you to be clear about what it is your agency can or intends to do that makes it especially attractive to that market. Its ability to do that will depend on how it is perceived by key decision makers in each of those markets.⁹

The manner in which the agency describes and refers to itself should contribute to an impression of the agency as a highly professional and efficient manager of home and community-based eldercare programs with expertise in linking employed caregivers to supportive services that match their needs.

The description of the agency and its services should be concise and in non-bureaucratic jargon. It should clearly convey an impression of the agency as having the requisite skills, talent and expertise to deliver a quality eldercare program.

[Positioning is] a process that lets you distinguish your agency from the competition in order to be the "preferred provider" of eldercare services to employers in your area

If you can not articulate why someone should choose you over your competition, then you have not done your homework and are not ready to market your services.

Call In the SWOT Team

A "SWOT" analysis can be the first step in determining how you will position your agency and its eldercare services. SWOT analysis entails an honest evaluation of an organization's Strengths, Weaknesses, Opportunities, and Threats. While strengths and weaknesses generally refer to an organization's assessment of its own internal capacity, opportunities and threats generally refer to the organization's assessment of overall trends in the outside world and particularly in a AAA's planning and service area. Some questions to answer before a SWOT analysis can be initiated include the following:

- Who is your market?
- What are they buying?
- Who else is selling to them?
- What do your competitor's products include?

A comprehensive SWOT analysis should include a thorough assessment of the competition for employer eldercare and what differentiates an AAA broker/provider from this competition. The level of competition in the corporate area is growing rapidly and includes:

- National for-profit resource and referral companies. These companies market predominantly to the large Fortune 500 companies, a market the aging network is not yet serving due to lack of a consistent, nationwide infrastructure.
- Other non-profit vendors (such as Family Services Agencies)
- Sectarian organizations (such as Jewish Family and Children's Services)
- Private geriatric care managers
- Consultants

An examination of the competition can serve as the basis for program development. In the employer eldercare field, a standard line of products and services currently is being offered to companies. In offering the standard line of products, such as surveys, seminars, and telephone consultation, it is key to differentiate your products and services from those of your competitors and to improve upon them. This can be accomplished in many ways. In making strategic decisions about how to differentiate yourself from your competition, consider the following questions:

- Will you offer a higher quality product?
- Will you offer a lower price?
- Will you offer better customer service?

These are all areas in which you can say to a potential corporate client, "Here's what makes our organization different from the others." If you can not articulate why someone should choose you over your competition, then you have not done your homework and are not ready to market your services.

Strong Attributes of the Aging Network

Although agencies will differ in their approach to defining their role in the community care system, certain attributes should be stressed to employers. These attributes may include:

- Your agency's function as a focal point in providing a continuum of access services (I&R, outreach and case coordination, and support or care management) in one location.

- Your agency's role in developing comprehensive, cost-effective and quality eldercare services.
- Your agency's strong advocacy efforts on behalf of elders with the greatest needs.
- Your agency's client-centered approach to care coordination.
- Your agency's previous experience, if any, in providing employer services or other types of partnerships with the private sector.

Features, Advantages & Benefits

Most agencies have put together a descriptive brochure about available services and programs. Often, these brochures describe at some length the various features of the agency, such as:

- The agency's services or products
- How your agency is funded
- Agency staff

Feature-laden brochures, however, do little to communicate to employers your agency's "preferred provider" status. An effective communication for employers provides the necessary linkage between a feature and a benefit that helps achieve a desired objective. In this way, the agency's position as the *preferred provider* is established in the client's mind from the start.

Benefit statements for each feature could include:

- A description of how the employer/employee will benefit from using your eldercare service or product.
- A description of the unique opportunity provided by your service for the customer.
- A description of the results expected by the customer when they use your service or product.

A good group exercise for your staff is to brainstorm a list of all the features you can think of for your eldercare program. Then brainstorm another list, from the employer's perspective, of all the advantages and benefits of an eldercare program. Review each list and note where you see relationships between a feature and a benefit. Think about these two lists anytime you print or say anything about your eldercare program.

To get you started, here are two examples of a feature followed by a benefit statement:

Feature: Our AAA serves as a focal point for aging services in the communities we serve.

Benefit: "One stop" shopping makes it easier for your employees to find out what services are available, what criteria must be met for eligibility, and how to access these services as needed.

Feature: Our AAA is part of a national aging network.

Benefit: One call saves your employees time, money and frustration—particularly when they have "long distance" caregiving needs with elderly relatives in cities and towns across the nation.

The overriding message to be conveyed is that it is good business for employers to help employees balance work and family responsibilities.

What Your Marketing Materials Should Say About You _____

Talk to Your Target Audience

Developing an understanding of the business perspective is part of the homework that needs to be done. Among the issues that concern businesses are: productivity, turnover, absenteeism, tardiness, employee morale, and well-being. Any promotional or marketing materials should speak to these concerns and how eldercare affects the bottom line.

Keep the Message Clear and Concise

Marketing materials should present briefly the eldercare issue as it relates to productivity and how your services will address the company's problem. Using bullets in a format is popular because it makes the information easy for the reader to scan quickly. The goal of written materials is to get the attention of your target audience, not to explain your products and services in great detail—that is the purpose of the face-to-face meeting. Your marketing materials should leave the client wanting to know more about your organization and the benefits of using your services.

Get Professional Assistance

Again, if the aging network intends to reach out to private sector businesses in an effective manner, we must communicate our message in a way businesses can understand. Getting professional assistance can be expensive, but it can be free if services are offered on a *pro bono* basis. Using the connections of a business advisory group or a board of directors is a good place to start in searching for this type of assistance. In most cities, there are Ad Clubs which help match human services organizations with advertising agencies willing to work *pro bono* for a good cause.

Communicate From the Employer's Perspective _____

While there is no perfect recipe for what and how to communicate information to employers, a sampling of copy points may help your agency develop an approach that works best for you. These points can be excerpted and adapted for use in letters, brochures, fact sheets, newsletters, proposals, etc.

The overriding message to be conveyed is that it is good business for employers to help employees balance work and family responsibilities. The key is not to overwhelm your audience with statistics. Keep bullets brief and focused on the employer's perspective.

The first section makes the case as to why eldercare is a business issue. This section must convince employers that it is in their best interest to find out more about the need and desirability of an eldercare program in general.

The second section describes your agency's expertise and qualifications to provide eldercare service. It is designed to convince employers that your agency in particular is the one they should contact to pursue the development of an eldercare program.

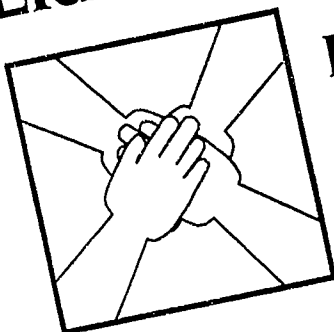
Some agencies find it useful to categorize their eldercare services in a "menu" format which allows an employer to select a service or package that meets its particular needs. Three types of services are suggested: group, employer and individual. All agencies, of course, do not have to offer the same array of services. However, this classification may help you think through the presentation of your agency's service package.

Remember—individual agencies are expected to adapt these copy points, as needed, to fit their specific objectives. Every communications piece does not need, nor should it include, every point described here.

Why Eldercare Is a Business Issue: Making the Case _____

The employer must have a reason for reading your material. The cover of your brochure should stress the benefits to be gained by dealing with your agency. The interior copy expands on these benefits by explaining why eldercare issues should receive corporate attention and acquainting the employer with the the positive features of your agency.

Your Eldercare Connection



Local Name Area Agency on Aging

- Improve employee productivity.
- Retain your most valued personnel.
- Strengthen your workforce.
- Reduce the "hidden" costs of employee eldercare.

An accident or illness can suddenly increase the level of care required by an employee's parent.

A responsive eldercare program can help employee and employer alike.

- **Enhance productivity** by helping employees cope less stressfully, more efficiently with the demands of eldercare.

Extensive phone calls on company time, long lunch hours, late arrivals, early departures, and absenteeism can result as workers try to track down the necessary services or provide the assistance directly. When parents live in another state, the impact is even greater.

- **Recruit and retain valuable personnel** with programs and policies reflecting your concern for family responsibilities.

Increased eldercare demands typically fall on workers at the age when their experience and training make them most valuable to your business.

- **Control costs** by dealing with concerns before they become problems that impact on job performance.

Education, information and easy access to assistance can reduce stress and allow workers to maintain job performance while handling family demands.

\$2,500

One study estimated the dollar cost of absenteeism and lost productivity averages \$2,500 yearly for each worker who doubles as a caregiver.

The Costs of Eldercare

- **Diminished productivity and errors**
from the fatigue and stress of arranging for or providing necessary care.
- **Training expenses**
to replace workers who must leave to care for elders.
- **Sick leave/hospitalization premium increases**
for stress-related illnesses.
- **Poor employee morale**
from the conflicting demands of work and family.

Employees who care for older persons are an important part of YOUR workforce.

- Women, aged 35 to 54, will provide 60% of the growth in the labor force in this decade. Three-fourths of those caring for the elderly are women.
- The bulk of the work force—Baby Boomers—are now in their mid-30s to late 40s, with parents in their 60s and 70s, the age when most disabilities begin.
- Retaining qualified, skilled workers is increasingly important with fewer young people entering the workforce. In recent years, 14% of caregivers have gone from full-time to part-time employment; 12% have left the workforce.
- 65% use work time to deal with caregiving responsibilities, according to a federal government study.
- On average, the caregiving employee spends 10 hours weekly—the equivalent of a part-time job—in providing eldercare assistance to a family member.
- For the first time, couples in their 40s are likely to have more parents (and grandparents) than children.
- Conflicts between caregiving and job demands create stress and inevitably lead to lost time, excessive personal phone calls, stress-related illnesses, and higher health premiums. Caregivers may also be unwilling to accept promotions, overtime, or travel assignments.
- Most people are unprepared for eldercare responsibilities and could benefit from educational programs.
- An IBM study found that 50% of its caregiving employees needed to find services more than 100 miles away.

We can help you help them.

Our Area Agency on Aging is uniquely qualified to provide eldercare services to your business. We are proud of our 20-year history as a leader in providing comprehensive services to our community's elders and family members. Our Agency helps thousands of frail older Americans live safely and independently through cost-effective management of home- and community-based services. Our expertise and knowledge of eldercare services enables our agency to provide your employees with customized eldercare information and services.

We are a part of a national aging network of federal, state and community agencies, mandated under the Older Americans Act to serve as advocates for needy elders. Our Agency is officially designated by the State Office on Aging to serve elders in this city/county/region. This network is the most experienced, most extensive care coordination system for older persons in America. Together, we can provide your employees with referrals and information about a broad range of eldercare services in any community in the country.

We can help your employees with information about...

■ Access Services

- Case management
- Transportation

■ Community-Based Services

- Adult day care
- Congregate meals
- Legal assistance
- Elder abuse prevention
- Employment programs
- Senior center programs

■ In-Home Services

- Home-delivered meals
- Home health services
- Telephone reassurances
- Friendly visiting
- Respite care
- Chore services
- Energy assistance/weatherization

■ Institutional Care

- Pre-admission screening
- Ombudsman services

We can help your employees...

■ Identify needed services for older relatives, efficiently and confidentially.

■ Contact appropriate state and local agencies.

■ Learn about eldercare options and alternatives.

■ Become informed consumers of eldercare services.

Our Approach to Eldercare

- An eldercare information and referral program is an investment that improves productivity, increases morale, reduces absenteeism, and decreases stress—strengthening your company and the well-being of your workforce.
- Each employee is a unique individual affected by the stress and emotional impact of decisions regarding eldercare.
- Eldercare is an issue of national scope requiring coordination that assures quality control since elderly parents often live far distant from their adult children.
- The agencies best suited for providing eldercare information and referral are those whose public mission is to advocate for programs and services that preserve the dignity and independence of the elderly in their homes and communities.

Our Eldercare Services Fit Your Needs

■ Group Services for current and future caregivers

On-site Educational Seminars

Single or series (particularly suited for pre-retirement planning)

- Aging and family issues
- Locating appropriate services
- Financial and legal issues
- Medicare and Medicaid
- Long-term care insurance
- Aging at home and other residential settings.

On-site Information Booths

Health fairs provide important resource information and let employees know about their firm's own eldercare program. We involve community social and health service providers to staff tables or booths and pass out materials describing their services.

On-site Information Exchange

Employees stressed by caregiving responsibilities often welcome the opportunity to share experiences or receive more detailed information about special subjects. We arrange and facilitate such meetings to provide mutual support.

Special Publications

- Directory of community services including contact names, addresses and telephone numbers for key organizations. Directories can be overprinted with your company's name for a customized appearance.
- Tip sheets covering a single topic; distributed at seminars or with individual consultation. Insert in company newsletters as a good way to maintain employee awareness of the eldercare services and call attention to new eldercare resources.
- Pamphlets and publications that address caregiving and other subjects of interest.

■ Employer Services for management personnel

Supervisor and Management Orientation

Managers and supervisors are the key to reaching employees and making initial referrals to community services. This session discusses the supervisor's role in supporting company-sponsored eldercare programs and policies.

Focus Groups

We can help you explore the effects of caregiving on employees to determine the need for an eldercare program. This approach gains specific feedback about the interest in various services.

Preparation of Communications Materials

We assist with the development of employee brochures, flyers, articles, and other promotional materials.

■ Individual Services for employees with specific needs

Confidential Consultation and Referral Services

We can assess your employee's caregiving problems and identify appropriate community resources. Our follow-up ensures resolution of the problem. We also check on service eligibility and availability and provide written confirmation of service referrals.

Consultation may be accessed by:

- Our special 800 telephone number linking the employee with an experienced counselor.
- On-site consultation with a counselor on a walk-in basis.
- "After hours" telephone conferences or off-site meetings

Long-distance Caregiving Assistance

Link your employees with information about resources for elderly relatives in cities across the country through our nationwide network.

Preparing a Business Plan

For some agencies, the extent of their employer eldercare activities may consist only of conducting an occasional seminar or distributing resource directories. Not all agencies approach employer eldercare as a fee-for-service endeavor. On the other hand, a few AAAs have experienced modest success in selling services, primarily educational seminars, to local employers. At some point, such an agency may wish to make a more concerted effort to generate additional private resources.

State and Area Agencies on Aging need a framework for viewing the entire planning process for developing and operating an employer-sponsored eldercare program. The framework presented in this chapter is that of the business plan.

Framework for Preparing a Business Plan

A business plan is your guide for unfolding a successful eldercare program for employers. Further, this plan also lays out all the essential elements of interest to the corporation, namely,

- your overall mission;
- your eldercare program and its part in your agency's overall mission;
- what you have to offer and how will you offer it;
- why a corporation needs it and whether other corporations use it or need it;

Does Your Agency Need a Business Plan?

Many agencies may decide that the time and effort to develop a business plan is not justified by the level of employer interest, expected revenues or other priorities. Even if an agency opts not to actually write a business plan, just reviewing what is involved will help an agency make smart decisions about the effective allocation of limited resources for whatever level of corporate activity is undertaken.

Another advantage of using a business plan model is that employers are accustomed to new ideas, plans and projects being presented in a business plan. Adopting a business perspective helps ensure that all aspects of

your plan, from service design to promotion, delivery and evaluation will be responsive to the interests and needs of local employers.

The process of writing your plan helps to clarify your thoughts. Parts needing improvement become self-evident. Also, when you present a written plan to others for review, you save time and make a much better impression than with only an oral presentation.

The writing of the business plan should be a team effort—not an exercise involving only the director. Employer eldercare activities will cut across staff lines and program areas such as finance, planning, and contracts.

- what it will cost the corporation;
- your goals, what you hope to achieve, and when; and
- how your overall mission will affect the services to the corporation.

The business plan, then, functions as both an internal and external management tool. Internally, the plan helps the agency make efficient resource allocation decisions of time, staff and money. Externally, the plan helps the agency attract funding and employer support. Therefore, you need to condense all your thoughts into a document that can be used for these multiple purposes: a planning document for the agency, a corporation proposal, and an information document for funding purposes to philanthropic organizations. The matrix on page 58 illustrates how the needs of a corporation who reads this plan can be compared to the needs of an agency using this document as an internal planning tool.

Keep this matrix in mind as you begin to write your business plan. You have two needs: First, your own, in writing out in detail each section with your organization in mind. In other words, you can use this plan to follow your progress and select options to be taken at given points along the way. Second, you need to put yourself in the shoes of the corporation so you can answer their questions even though this is your agency's action plan. Crisp, skilled writing and examples will allow you to accomplish both missions.

Components of a Business Plan for Eldercare _____

Cover page

Use the agency's letterhead or stationery with the eldercare program logo or graphic. The only information needed on this page is the title identifying your document as a business plan for the agency's eldercare services, your agency's name, address, telephone number, and date.

Benefits of a Business Plan _____

A business plan helps the agency to:

- Think in a disciplined and decisive manner and improves the staffs' ability to focus on the whole picture.
- Define the agency's mission: Where does the agency want to go? How will it get there? The timeframe? The cost?
- Establish operating objectives which help measure results.
- Convince funding sources that your projected programs warrant their financial support.
- Set realistic expectations—an important consideration for your Board members and Advisory Council.
- Set goals and processes for implementation that are consistent with federal and state eldercare policies.

Components of a Business Plan for Employer Eldercare

Cover page

I. Executive
Summary

II. Table of Contents

III. History of the
Agency

IV. Definition of
Business

V. Definition of the
Market

VI. Definition of
Eldercare Services

VII. Management
Structure

VIII. Goals and
Objectives

IX. Financial
Objectives

I. Executive Summary

The Executive Summary is a persuasive summation of all other sections of the business plan. Keep this summary brief, ideally one or two pages. Write this summary after all the other sections are completed. The purpose of the Executive Summary is to persuade others who are reviewing your plan to read it. Make sure all the key selling points are brought out here.

II. Table of Contents

List all section headings with corresponding page numbers. It is intended to help the reader find specific information without searching through the whole plan.

III. History of the Agency

The history of your agency should be concise and say why your agency is an important player in the coordination of services for older persons and families. Remember, your business plan is also a selling tool for funding support. Keep this section succinct, but powerfully worded. Less emphasis should be placed on the historical evolution. Don't forget that corporations are interested in what the agency can do for them. Avoid using bureaucratic or technical jargon an outsider will not know or understand.

Even though this section highlights a broad overview of your agency, you should try to weave in subtle ties to the corporate sector. For example, the AAA exists to serve the public—and part of that public is the employee with eldercare responsibilities. Another example is how the AAA involves all sectors of the community including businesses on its advisory boards and task forces as a communications link to the business community and the many citizens of the community that are employees. In brief, the history section should be tailored to show the part corporations are already playing as a partner in the community care system.

Your agency's history may also touch on the following points, which should be summarized briefly: governing body (city, county, regional council, non-profit board); how long in operation; primary mission, area served; number of seniors in PSA; number of elders served each year; range of services provided directly and through contracts; operating budget and funding streams; and designation by the State under the Older Americans Act.

Make sure your history section conveys a picture of your role in the community as:

- **A facilitator** for bringing services already available in the community together with the older person or caregiver who needs these services.
- **A catalyst** in initiating planning actions on the part of local government and existing agencies to fill service needs where gaps have been identified.
- **A convener of interested citizenry** to help not only older people but also to enhance the quality of life in the community. Corporations are usually interested in agencies that provide services that benefit them as well as their employees. If applicable, mention that your AAA has corporate or business members on its advisory board or commission.

- An access point in the community to provide people with referrals to existing services in the community. Corporations like to hear about efficiencies such as one place to go to find specific information. Fragmentation of service agencies is generally considered inefficient to corporations.
- A partner in the community with other organizations trying to serve the public. You can highlight your services and how they mesh with others. Also, you can emphasize how you have filled gaps in services and helped other agencies to enhance their services. Again, the emphasis on coordination, team playing and helping others stands out with a corporation.

IV. Definition of the Business

Begin this section with a clear statement of the type of services offered by your agency that could meet multiple needs of an employee with eldercare responsibilities. As you describe the services available weave in definitions when needed and how the services could benefit the employees.

Comparison of Agency and Employer Interests

in the Business Plan

| Business Plan Segments (what and why of these segments to the AAA) | Interest of Employer (reading your plan of action) |
|--|--|
| Overall agency mission | Overall agency mission |
| Eldercare program mission related to overall mission | Your eldercare program—What is it and how does it fit into your mission? |
| Definitions of services and how is it to be provided | What is it you have to offer and how will you deliver it? |
| Overall market for these services | Why do I need it? Do other employers use it or need it? |
| How will we market eldercare services to corporations? | Do I like your presentation of your program? |
| Reimbursement for services Options | How do I pay for these services? |
| Long- and short-range goals Accomplishments | What do you hope to achieve and when? |
| Relationships of costs of this eldercare program to my overall program | How will your overall mission affect the services you provide to my employees? |

Eldercare services enhance the employee/retirees' ability to give care and assistance to a dependent elder and link his or her relative with needed community services.

Include a clear definition of employer-sponsored eldercare. Some concepts you might consider incorporating into this section are:

- The term eldercare is used broadly to include a wide range of policies, benefits and programs. Some employers have policies covering work schedules which help the employee manage the excessive time burdens associated with caregiving. Benefits such as dependent care tax credits help the employee meet financial obligations linked to caregiving. Educational and information programs help employees locate needed services for the dependent elder or provide direct support to the employee in managing the stress of caregiving.
- Generally speaking, employer eldercare is a service that an employer makes available to its employees and/or retirees who may have caregiver responsibilities for an older family member. Eldercare services enhance the employee/retirees' ability to give care and assistance to a dependent elder and link his or her relative with needed community services.
- Employer eldercare services are focused not on direct services for older persons, but on products and services that assist the employee to find and use services needed by elders. This helps employees balance their dependent care responsibilities with their work requirements.
- The business of your agency, with respect to employers, is to provide services that help employees better manage their work and family responsibilities and others that help managers who supervise employees with eldercare problems. The information and referral services to be offered will include: educational seminars, individual consultation and referral, publications and resource directories, caregiver fairs, and management training.

V. Definition of the Market and Marketing Plan

This section of your business plan describes the principal marketing functions to be undertaken: market research and analysis, product development, distribution, pricing, and promotion. At a minimum, information to be covered here will include development of the eldercare services to be offered, the place or area of marketing, promotional plans, and the price or fee schedules for such services.

Here is a framework for completing this section of your plan:

Market Research and Analysis

This part provides relevant information about the pool of employers in your area and other providers of eldercare services. Not every item may be available for every community. Determine the most relevant characteristics for your community. Check with your local Chamber of Commerce, Office of Economic Development, and other business groups or academic institutions that may track this data. Do not burden your plan, however, with too many statistics and research. Keep this section, as with all others, simple and tailored as much as possible to the needs of your local community.

Your market research and analysis could include:

- Number of companies in your PSA. Include significant public sector employers, too, like school systems, colleges and universities, county government, military installations, etc. What industries predominate? What major changes are occurring? Are employers moving in or moving out?

This information will help forecast potential service growth.

- Segmentation of employers, by number of employees, between large and small employers. Segmenting your market by size gives you both ends of the spectrum for your services. Strategies for serving the whole community must include large and small businesses.
- Number of male and female employees. Women, particularly in the middle-age years, provide most of the care in families to older persons.
- Age range of employees. Employees in their middle-aged years and pre-retirees may be particularly interested in caregiving issues.
- Companies known to have existing dependent care or EAP programs. Most states have a chapter of Employee Assistance Professionals, Benefit Planners, or Human Resource Directors. Contact them for information or lists of companies that have dependent care programs. You may want to target these firms first.
- Information about other providers of employer services and how their presence affects your plans? How do you find this information? By networking—asking others in the field; by checking the telephone yellow pages for names of other agencies and telephoning for literature; and by calling corporations in the area and asking them who they use and how they like the service. This exploratory work can be very interesting and helps you identify gaps in services.

Once you've determined the total available market for your service, then estimate the share of that market that you can expect to obtain. How many seminars can you expect to do in a year? How many training sessions can you expect to conduct for managers? You need a realistic estimate of the acceptance of your service. Be conservative in projecting your market share over the next three years.

Product and Service Development

This section defines the specific services the agency plans to offer and what work is required to complete development. Costs to develop each service are identified: staff, space, travel, supplies, etc. Protocols for each service are described as well as mechanisms for quality assurance.

Not every agency will necessarily offer a comprehensive package of services. Agencies need to choose a mix of services that makes the most sense for limited involvement during a start-up phase of operations. Later on, more services can be added as demand and circumstances warrant.

Distribution

Distribution refers to location, mode of delivery and access by employees to your eldercare services. Issues related to distribution could include:

- Are services available only on-site at the workplace or are alternatives for off-site counseling being considered?
- How accessible is your program? Is there 24-hour service for information and consultation service? Will an answering machine record messages after normal business hours? How prompt will initial appointments be scheduled for individual counseling after a request is received?
- Is your staff experienced in dealing with a racially and ethnically diverse workforce?

Be conservative in projecting your market share over the next three years.

It is not so much a matter of deciding on a single strategy as knowing which arrangement best fits the employer's needs.

Price

This part of the plan provides details for offering employers various pricing options for your eldercare services. It is not so much a matter of deciding on a single strategy as knowing which arrangement best fits the employer's needs. A useful primer to help you complete this part of your plan is the *Handbook on Employer Eldercare: Determining Costs and Charges for Program Development and Operations*, available from the National Association of Area Agencies on Aging. This publication describes three options for structuring a payment method for your eldercare services:

- **Per Capita Assessments**—This type of arrangement is based on a fixed fee per employee for a specified package of eldercare services regardless of how many employees use the service.
- **Flat Fee**—A flat fee covers a specified number of services with a charge for cases and activities that exceed the base number.
- **Fee-For-Service**—With this strategy, each component of your eldercare service package is given a price tag. Charges can be broken down for each individual telephone consultation, a single seminar or series, a health and information fair, publications, and consulting time.

Four points to consider when setting prices:

- How much does the product actually cost you to produce?
- Do some or all of your prospective customers have the means to pay the full cost or even allow you a profit?
- Will your customers perceive enough value to pay what you want to charge?
- How much do others charge for similar services and products, and are they successful?

Promotion

This part of the marketing plan describes the strategy the agency will undertake to communicate to employers and motivate them to use the eldercare services and products. A promotional strategy can include a long list of creative ways to make your eldercare program known among employers. Your strategy should lay out the mix of these techniques and how they will work together to produce the response you want. Your implementation plan for promotional activities would include the steps to be taken, staff responsibility, deadline, and budget.

Some of the techniques that could be combined in a promotional campaign would include:

- Public relations events such as luncheons, banquets and other special events
- Advertising in trade newspapers
- Brochures
- Radio public service announcements
- Business briefings co-sponsored by a private sector partner
- Articles in newspapers regarding activities of your agency on behalf of employers
- Establishing a Business Advisory Committee
- Direct mail to businesses

- Joining other business organizations for the opportunity to network and inform other groups of your services
- Talk shows

VII. Management Structure

This section defines how the eldercare program is managed within the total organization of the agency. The roles and responsibilities of key management staff are defined and related to their responsibilities with the employer eldercare initiative. The list of management staff should include each staff member's name, degree or credentials, years of experience, specialized skills, as well as other information that highlights an individual's attributes.

You may also wish to include a brief mention of any Board Directors or Advisory Council members with related business experience and comment on how their advice will be sought.

Refer the reader to an appendix for an organization line chart and resumes of key staff.

VIII. Goals and Objectives

This section of the plan answers the specific questions about who, what, when, and how the agency accomplishes the task of developing eldercare services. Examples of goals and objectives could include:

Goal 1—Develop organizational capacity to deliver eldercare services.

- Incorporate a new non-profit subsidiary organization.
- Define and establish relationship between agency and the subsidiary.
- Establish subcontracts for selected services.
- Develop billing, reporting and quality assurance systems and personnel policies.

Goal 2—Implement marketing strategy.

What is the timetable, and who are the staff to carry out the tasks? Include such activities as developing and distributing promotional materials (including printed materials), networking with trade and business associates, advertising, etc.

Goal 3—Secure contracts with employers.

Specify the number of employers for whom you expect to have provided eldercare services by the end of the first year of operation.

Goal 4—Evaluate success of the program.

Discuss how the agency will establish a quality control capacity to continually monitor and assess employer/employee satisfaction; operating efficiency; and cost structure. Later this material can be used to attract new business.

IX. Financial Objectives

An important purpose of the business plan is to indicate the expected financial results of your eldercare operations. For anyone financially supporting your organization, it tells them why they should provide funds and what they are needed for. Any presentation of financial information about your services must be future oriented.

The list of management staff should include each staff member's name, degree or credentials, years of experience, specialized skills, as well as other information that highlights an individual's attributes.

An important purpose of the business plan is to indicate the expected financial results of your eldercare operations.

A financial statement for the current year and projections for two years beyond should be included and can be attached in the appendix. In making your forecasts and projections, assumptions must be made. These include, but are not limited to:

- Revenue
- Growth rate
- Time periods required
- Operating expenses
- General economic conditions
- Contracts to be negotiated

Income and expense projections should be made on a monthly basis for the current year. Second and third year projections can be on a quarterly or annual basis.

Appendix F provides a sample spreadsheet for developing your financial statement. The steps to be completed in order to fill in this spreadsheet include:

1. Determine the development and operational costs of eldercare services through analysis of fixed and variable costs and market factors. Describe the systematic way costs are calculated.
2. Set a rate to be charged for each eldercare service, based on your market analysis and unit cost data. Do you anticipate an annual cost increase? Know how to answer this question.
3. Develop a forecast of revenues based on anticipated sales of each service or service package.
4. Using the estimated volume of sales (i.e. 10 seminars in Year 1), develop a forecast of expected service costs for the first year of operation. Do this for each service you plan to offer.
5. Summarize the financial performance for each service by comparing expected revenues to expected expenses. This will give you the expected profit or loss for each service.
6. Determine where adjustments must be made in the design to improve financial performance (e.g. increase volume, increase charges, lower unit costs, etc.)
6. Prepare a set of financial projections for Years 2 and 3.

Appendix to Business Plan

Additional information may be included in the Appendix at the option of the agency, such as:

- Map of agency's planning and service area
- Timetable for program development and operations
- Financial projections for Years 2 and 3
- Copy of most recent financial audit
- Organizational line chart
- Resumes of management staff

Other Important Considerations

Keep Your Business Plan Consistent with the Area Plan

Chapter One discussed issues AAAs should consider when undertaking employer eldercare initiatives. Each issue is assumed to be addressed in the AAAs' overall Area Plan and does not need to be repeated in the business plan.

Here is a review of the ten issues:

1. The agency has been provided targeting criteria by the State to assess AAA performance in targeting individuals with greatest economic or social need, particularly low-income and minority individuals.
2. The agency has specified methods to ensure that its responsibilities to target older individuals with the greatest need are fully and effectively continued.
3. Employer eldercare contracts should not restrict the ability of State Agencies on Aging to exercise oversight of Area Agencies on Aging.
4. Public funds should not be used to supplement payments made by a corporation under a employer eldercare contract.
5. Employer eldercare contracts should not limit an Area Agency on Aging's ability to judge or act in the public interest.
6. Norms are maintained for confidentiality of information in employer eldercare contract activity, such as information in the eldercare contract or information identifying individuals receiving services.
7. Appropriate fiscal controls ensure separate accountability of OAA funds, or other public funds awarded to Area Agencies on Aging, and funds from private, employer eldercare contracts.
8. No exclusive agreements are permitted. Employer eldercare contracts should not limit Area Agencies on Aging from providing similar services or benefits to other companies or groups in its service area.
9. The Area Plan describes the agency's plans for, and/or current involvement with, employer eldercare.
10. Employer eldercare contracts should not withhold information the State Agency on Aging needs to carry out its oversight of Area Agencies on Aging and ensure preservation of public mission activities.

Appearances Are Important to a Business Plan

Remember, you may want to use the plan as a funding proposal. The quality of the agency's services will be judged in part on the appearances of this document. Every effort should be made, and time spent, to assure the plan is:

- arranged logically and has a table of contents;
- carefully checked for spelling and grammar—not only with the automated spell checker in the word processor, but also by a thorough proofreading;
- typed on a word processor;
- printed using a high-quality laser printer and neatly bound with a clear title page. (A hand-typed, stapled document does not present the professional image desired.)

Your plan should be prepared in an 8-1/2" by 11" format. For internal and management purposes, use a three-ring notebook. Remember that most business plans can be presented effectively in fewer than 40 pages. Length of the document is often inversely proportional to the probability of its being read.

Length of the document is often inversely proportional to the probability of its being read.

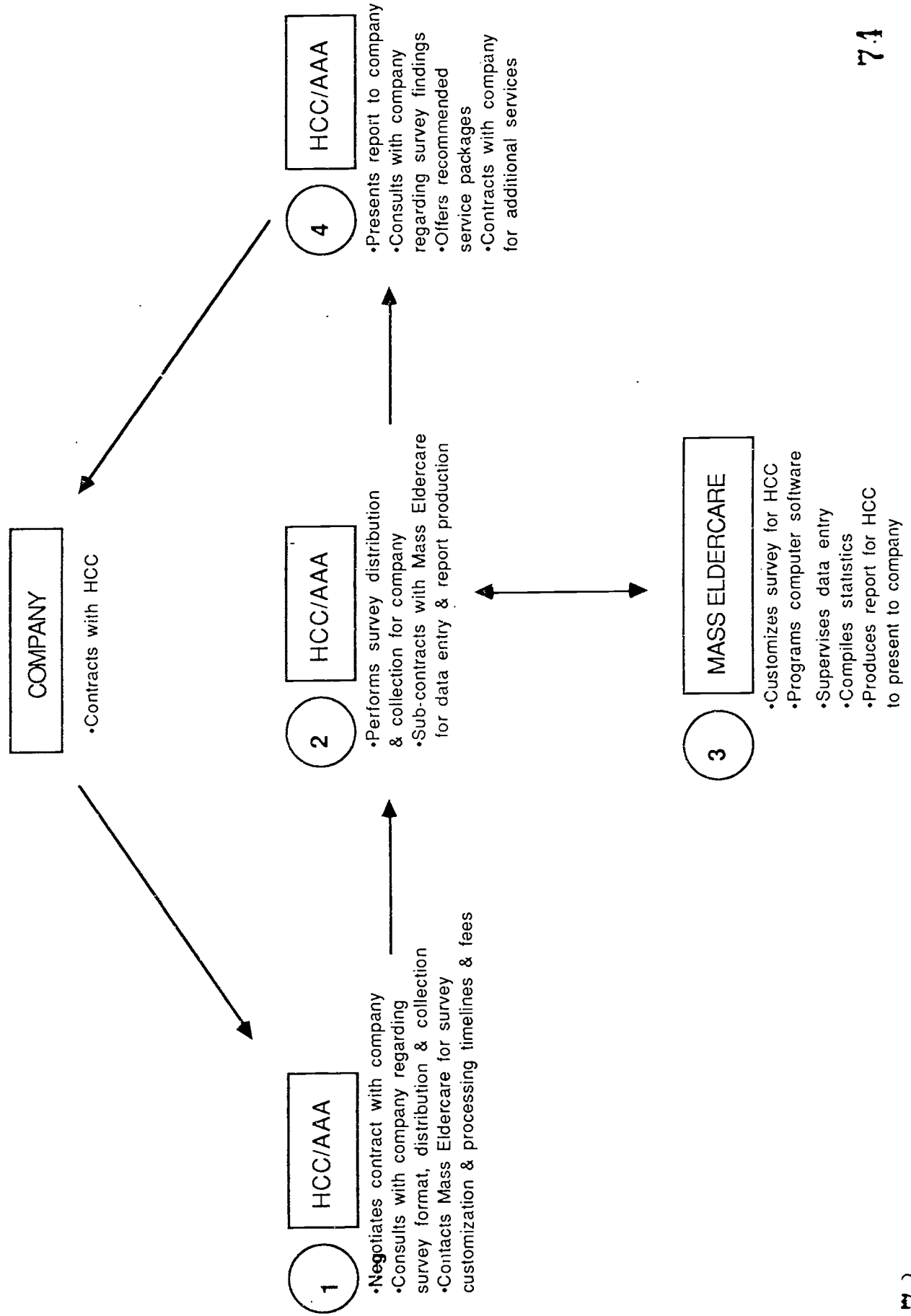
1. *The Washington Post*, November 15, 1991.
2. *New York Times*, September 11, 1992.
3. Andrew Bergman and John Capitman, *Private Sector Initiatives in Long Term Care: Implications for the Aging Network*, Brandeis University, Waltham, Massachusetts, 1991.
4. Program Instruction to State and Area Agencies on Aging Administering Plans Under Title III of the Older Americans Act of 1965, as amended. Subject: Eldercare. AoA-PI-90-06, U.S. Administration on Aging, Department of Health and Human Services, Washington, DC, 1990.
5. Older Americans Act: More Federal Action Needed on Public/Private Elder Care Partnerships. U.S. General Accounting Office, July, 1992, GAO/HRD-92-94.
6. For a more detailed discussion of pricing strategies for eldercare services, see *Establishing a Partnership for Eldercare: A Technical Guide*, published by the New York City Department for the Aging, and *Handbook on Employer Eldercare Services: Determining Costs and Charges for Program Development and Operations*, published by the National Association of Area Agencies on Aging, Washington, DC.
7. Dale A. Masi, *Designing Employee Assistance Programs*, Chapter 4, *Consortiums*, American Management Associations, 1984.
8. Ben Abramovice, *Marketing Long Term and Senior Care Services*, The Haworth Press, 1984.
9. Armond Lauffer, *Strategic Marketing for Not-for-Profit Organizations*, The Free Press, 1984.
10. *Corporate Eldercare: The Aging Network's Response to the Needs of Employed Caregivers*, National Association of Area Agencies on Aging, Washington, DC, April, 1992.

Survey Protocols

Suggested Timeline

Tips for Conducting a Workplace Survey

MASS ELDERCARE WORKPLACE CAREGIVERS SURVEY PROTOCOLS



STEPS IN ORGANIZING WORKPLACE CAREGIVERS SURVEY

| <i>Organizing Task</i> | <i>Time Frame</i> |
|---|--------------------------------|
| 1) Announce survey at company | 1 month before distribution |
| 2) Company drafts memo to attach to survey and copies survey | 2 weeks before distribution |
| 3) Distribute survey | At designated date |
| 4) Remind employees to return survey | 2nd week of survey process |
| 5) Company returns completed forms | 3rd week after distribution |
| 6) Mass ElderCare inputs, analyses, and presents results in final report | 5 - 7 weeks after distribution |
| 7) Company presents results to employees (through company newsletter or memorandum) | 2 months after distribution |

SOURCE: Greater New York Region of New York State Adult Day Service Association, Inc.

MASS ELDERCARE WORKPLACE CAREGIVERS SURVEY TIPS

The following is a compilation of experience and information gathered to date and designed to aid HCC/AAAs in marketing, planning, and conducting Workplace Caregivers Surveys.

- When a company expresses interest in conducting a workplace survey, ask them if they have ever done a survey before to get an idea of how they expect to distribute and collect the surveys and what kind of a response rate they might expect. A projected response rate is important to know for pricing purposes.
- In planning the survey process with a company, ask them if there are questions they would like added, deleted, or modified. Try to discourage major changes to the instrument as it will interfere with our ability to make comparisons between companies and will cost the company more for us to adapt the software to major changes in the instrument itself.
- The survey instrument can be personalized by adding the company's name to the cover sheet of the survey and inserted into appropriate places throughout the survey itself. Be sure to have: deadline for completion and return of survey including which day of the week, how to return survey, and where to return survey.
- It is important that the company announce the survey before it is disseminated. This can be accomplished through the company newsletter or in a memorandum from management, preferably high-level management.
- It is also important to have some corporate communication attached to the survey instrument itself. This could be in the form of a memorandum from management introducing the survey and asking employees to fill it out and return it. Two important points must be communicated in this cover letter: 1) the issue of not raising employee's expectations; 2) the issue of confidentiality. This memo is then attached to the survey, along with a cover sheet from Mass ElderCare explaining exactly how to complete and return the survey.
- The most simple and easy way to distribute surveys to employees is through inter-office mail or attached to employee paychecks. There can also be a face-to-face distribution and collection process where a table can be set up outside the employee cafeteria or if a particular worksite is a round-the-clock manufacturing facility, the process could entail having employees report to the cafeteria at certain hours per shift.
- For companies of less than 1,500 employees, survey the entire population. For larger companies (ie. more than 1,500 employees) survey a randomly selected sample.
- After survey has been distributed, allow two week time period for employees to return completed forms. During the second week, the company should send a reminder to employees and if only 20% of the surveys have been returned, allow an additional two weeks for return.
- As a general rule of thumb, a 20% response rate is adequate for this type of survey, but response rates can vary quite a bit from company to company. It is important to ask the company if and what its experience has been in conducting similar types of surveys in the workplace.
- Analysis and production of a final report to management should be completed as quickly as possible, usually within one month of receipt of completed forms from company.

Bounce-Back Postcard Sample

Eldercare.
It will affect your employees.
It will affect your company.

NON-PROFIT
ORGANIZATION
U.S. Postage
PAID
Greenfield, Ma.
Permit No. 140

Mass Home Care
24 Third Avenue
Burlington, MA, 01803



**Eldercare has become
the "hot" employee
benefits issue of the
1990s...**

Find out how *Mass Elder Care*
can help *your* company meet the
demographic challenges ahead.
Just fill out the attached Response
Card for complete details of all
our eldercare services.
Or call 1-800-AGE-INFO.

*We're the people who provide state &
federal eldercare services every month
to thousands of elders for the state's
Executive Office of Elder Affairs.*

Perforated _____



**NO POSTAGE
NECESSARY
IF MAILED
IN THE UNITED
STATES**

BUSINESS REPLY MAIL

FIRST CLASS MAIL PERMIT NO. 605 BURLINGTON, MA

POSTAGE WILL BE PAID BY ADDRESSEE

MASS ELDERCARE
24 3RD. AVE.
BURLINGTON, MA 01803-9611



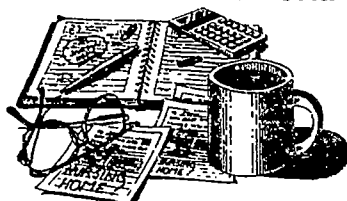
As many as 30% of your employees are dealing with eldercare !

"I literally spent hours on the phone trying to get help for my dad..."

Mass Elder Care® is a network of 30 private home care corporations & Area Agencies on Aging. We can offer your company a complete range of eldercare services, including:

It's a familiar story...One of your employees calls into work: their dad has had a heart attack, or their mom had a fall at home. When it happens--it happens suddenly--and family matters spill over into the workplace. That translates into sick time, tardiness, excessive use of the phone--or resignation. When personal problems affect productivity on the job--it becomes your company's business.

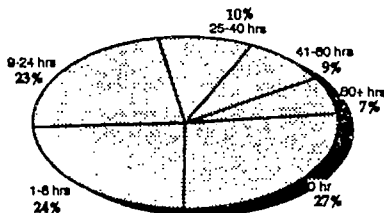
- The ElderLine™ a free info & referral number: 1-800-AGE INFO
- Dependent Care Needs Survey
- Aging Information Seminars
- Management Consultation/Training
- Private Care Management/Planning
- ElderCare newsletter
- State & National Resource book



And now you can help your employees deal with their eldercare concerns.

Eldercare can affect your company's bottom line!

Hours of Missed Work In One Year



Lost productivity due to eldercare can run as high as \$3,000 per employee per year!

Anywhere in Massachusetts, anywhere in the nation.

Mass ElderCare is available exclusively through our network of Home Care Corporations and Area Agencies on Aging, covering all of Massachusetts, with access to eldercare services across the country through our connection to a national network of Area Agencies on Aging. For the location of our member agency in your area, call the ElderLine at 1-800-AGE-INFO.

Mass Eldercare Response Card

Return this card now, or call 1-800-AGE-INFO

Yes, send me a complete description of Mass ElderCare® services available to my company, and put me on your eldercare mailing list.

Name: _____ Job Title: _____

Company Name: _____

Street Address: _____ City/Town: _____

State: _____ Zip: _____ Phone: () _____

I am most interested in: A needs survey ElderLine I&R

Aging Info Seminars Eldercare Management Training

Private Care Management Eldercare Newsletter/Resource Book

Other services: _____

Mass ElderCare is a program of the Mass Home Care/Area Agency on Aging Association

Perforated

**MASS ELDERCARE
CORPORATE ELDERCARE
PARTNERSHIP AGREEMENT**

I. Purpose

The purpose of this agreement is to delineate the protocols and responsibilities between the Mass Home Care Association ("the Association") and the _____ Home Care Corporation/Area Agency on Aging ("the Corporation") regarding the production and marketing of corporate eldercare products.

II. Definitions

For the purposes of this agreement:

- The term "corporate eldercare products", unless otherwise defined, shall refer to the following: 1) caregiver surveys, 2) employee seminars, 3) information and referral telephone services, including the Association's "Elderline" and "Corporate Elderline" programs, 4) consultation with individual employees, 5) private care management, 6) consultation with management, human resource, and employee assistance personnel, 7) Eldercare Resource Manual, 8) Eldercare "Tips" Newsletter.
- The term "corporate eldercare client" refers to any corporation or group of corporations, foundation, union group, retirees group, Health Maintenance Organization, insurance company, or other organized group seeking to purchase corporate eldercare products. It shall not refer to an individual person, or their family.
- The term "corporate eldercare product fee" refers to any fee charged for a corporate eldercare product to a corporate eldercare client.
- The term "Mass Eldercare" refers to the series of eldercare products developed by the Association.
- The term "Mass Eldercare member agency" refers to a Corporation who has contributed to the program and signed the partnership agreement.
- The term "seminar provider" refers to the speakers who have been approved by the Association to lead seminars as part of the Mass ElderCare Speakers Bureau.
- The term "multi-site marketing" refers to marketing to companies, unions, trust departments, insurance companies, health maintenance organizations, and other parties whose business is conducted in more than one location and/or have more than 500 employees.
- The term "single-site marketing" refers to marketing to companies, unions, trust departments, insurance companies, health maintenance organizations, and other parties whose business is predominately conducted in one home care corporation or Area Agency on Aging service area and/or have less than 500 employees.
- The term "fee-split ratio" refers to the revenue sharing arrangement between Corporations for certain Mass Eldercare products.

III. Responsibilities of the Association

The Association hereby agrees to:

- 1) provide member agencies with the services of Mass Eldercare Director of Products and Marketing.

- 2) market services to single and multi-site firms statewide with particular attention given to multi-site firms with more than 500 employees. When a multi-site company expresses interest in Mass ElderCare services, a Corporation will be selected to work directly with the company in an account management capacity. Criteria for selection will be based on geographical location, corporate experience, strength of previously established relationship with company, staffing capacity, and whether the Corporation offers private care management services, etc. (See Marketing Protocols under Section IX).
- 3) jointly make marketing presentations with the Corporation as requested by the Corporation and according to the Marketing Protocols set forth under Section IX of this agreement.
- 4) provide the Corporation with marketing and eldercare product materials (brochures, seminar curriculum, etc.) and the Association's Director of Products and Marketing, as requested, by the Corporation.
- 5) ensure appropriate product quality control standards and procedures, including monitoring and evaluating the capacity of the Corporation to provide eldercare services.
- 6) provide the Corporation with technical assistance, printed materials, background research, marketing mailing lists, and other materials designed to assist the Corporation in its marketing efforts.
- 7) oversee operations of the Elderline and Corporate Elderline projects.
- 8) reduce duplication of marketing effort by encouraging the Corporation, whenever feasible, to pursue joint marketing ventures with other member agencies (see Section V).

IV. Responsibilities of the Corporation

The Corporation hereby agrees to:

- 1) The Corporation is free to market to multi-site and single site firms.
- 2) adhere to quality control standards as established by the Association.
- 3) jointly market corporate eldercare products with the Association as specified in the Marketing Protocols under Section IX of this agreement, or as requested by the Corporation. The Corporation agrees to include the following language on all its marketing materials: "_____ is a member of the statewide Mass ElderCare network" when prospective corporate client has been identified through Mass ElderCare.
- 4) give attribution, in its marketing presentations, to Mass ElderCare (for the marketing materials developed by the Association and for marketing prospects identified through Mass ElderCare).
- 5) financially contribute to the cost of the Association's Director of Products and Marketing position, plus support costs, and the Mass ElderCare project generally,

which cost for the calendar year beginning January 1, 1992, is established as \$1,735, unless otherwise agreed to by both parties in writing. The Corporation shall be billed annually for its share of the costs of the Mass Eldercare project, as approved by the Association. The Corporation agrees to notify the Association thirty days before the annual enrollment expiration date of this agreement of its intention to either continue in the project for an additional year, or to withdraw from the project. The project fee is non-refundable.

6) The Corporation further agrees to the fee-split ratios and protocols delineated in this agreement (see Section IX).

V. Marketing Negotiations

The Corporation may market to both single and multi-site firms outside its catchment area. The role of the Association shall be to pursue joint marketing ventures with Mass ElderCare member agencies where appropriate and/or requested by the Corporation. Mass ElderCare will attempt to develop a joint marketing or other unified approach, or an agreement as to which Corporation(s) will take the lead in the marketing contact.

VI. Copyright

All copyrights or other rights arising out of the corporate eldercare products covered by this agreement are the sole property of the Association. Copyright notice as it appears in the Association's corporate eldercare products must appear in any reproductions of the Association's written materials made by the Corporation.

VII. Confidentiality

The corporate eldercare products in this agreement are acknowledged to be confidential, and the Corporation shall not duplicate or otherwise disclose to any third party not part of this agreement or use any of the Association's eldercare products or descriptive materials, except as delineated in this agreement, without the prior written permission of the Association.

VIII. Liability

The Corporation agrees that the Association shall not have any liability for any loss or injury sustained by any person or entity in connection with, or resulting from, the use by the Corporation of any of the corporate eldercare products outlined in this agreement.

IX. Fees & Marketing Protocols

Mass ElderCare Marketing Protocols:

- If the Association is approached by a single-site firm, the prospect will be referred to the local Corporation serving that area (if local Corporation is a Mass ElderCare member). If local Corporation is not a Mass ElderCare member, the prospect will be referred to a Mass ElderCare member agency.
- If the Association is approached by a multi-site firm, a Mass ElderCare member Corporation will be chosen to pursue joint marketing with Mass ElderCare. This Corporation will take lead in marketing and arranging for service provision. Criteria for selection of the Corporation includes: geographic location, corporate eldercare experience, strength of previously established relationship with company,

staffing capacity, and whether Corporation offers private care management and/or other special programs and services.

• If the Corporation is approached by a single-site or multi-site firm, Corporation is free to negotiate contract with company and retain 100% of the revenue.

Mass ElderCare Product Protocols & Fees:

There are no set fees established for any Mass ElderCare products. Pricing will vary regionally and can be negotiated directly between the Corporation and prospective eldercare clients. Any products developed at the local level can be marketed directly to potential corporate clients, and Corporation is encouraged to make available any new products which Mass ElderCare may purchase for use with network of member agencies.

1) Workplace Caregiver Surveys: When the Corporation wishes to offer a caregivers survey to a corporate client, the fees for this product will be negotiated directly between the Corporation and the Association. A fee, based on the number of surveys processed and the extent of customization, will be charged by the Association to process surveys and produce uniform reports. subject to negotiation.

2) Aging Information Seminars: When the Corporation wishes to use Mass ElderCare seminars, Mass ElderCare has developed a Speakers Bureau for the provision of seminars to corporate clients. The Speakers Bureau will provide: 1) quality control for the network; 2) cost control for local Corporations in training seminar leaders. Only speakers approved by the Association will be part of the Mass ElderCare Speakers Bureau.

When a seminar or seminar series is sold by the Corporation, if the Corporation has approved seminar providers, the revenue stays with the Corporation under the provisions cited below. If the Corporation does not have approved speakers, the Corporation will secure approved speakers from the Speakers Bureau with fees negotiated between the Corporation and the entity representing speaker. If the Corporation sells seminar(s) outside its catchment area, the Corporation is encouraged to abide by the guidelines set forth below:

- a) Inform the local Corporation as soon as possible.
- b) Include the local Corporation in the presentation to provide information about home care services in area. This could be a 1 to 2 minute presentation by the local Corporation and mention of network to audience.
- c) Split revenue from seminar as follows: Corporation securing contract receiving 90% and local Corporation receiving 10%.
- d) If local Corporation chooses not to participate, no remuneration would be received.

3) Corporate Elderline Telephone Consultation Service: A corporate information and consultation service is offered throughout the Association. The Corporation may choose to market Corporate Elderline as a statewide toll-free corporate information and consultation telephone service. The Corp Elderline Specialist receives calls, takes key facts, and makes case referral to the local Corporation/Account Manager, and performs follow-up and quality control. From there, the Corporation assumes the case, conducts research, locates available services, and makes contact with the client. Fees for this product will vary and can be negotiated directly between the Corporation and Mass ElderCare. A negotiated fee

will be charged by Mass Home Care to support Corp Elderline in its function as a quality control and referral mechanism for Mass ElderCare member agencies.

4) Individual Employee Consultation: Any revenue generated from this source will remain at the Corporation.

5) Private Care Management: Any revenue generated from this source will remain at the Corporation.

6) Consultation to Management, Human Resource, and/or Employee Assistance Personnel: Any revenue generated from this source will remain at the Corporation.

X. Standards

The Corporation agrees to adhere to the following corporate eldercare product standards:

1) Workplace Caregiver Surveys: The Corporation is encouraged to use the "Mass ElderCare Caregiver's Survey" instrument for its surveying work, customizing the survey with notification to The Association. All input of data and development of the final report will be conducted by the Association. The Corporation will present the final report to the company. Company surveys shall be considered confidential by the Association and the Corporation. Any comparison across companies shall not contain company-identifying information.

2) Aging Information Seminars: The Corporation shall offer, at a minimum, the 5 standard seminars as developed by the Association and agrees to closely adhere to the curriculum content as outlined in the Association seminars. The Corporation may develop its own list of supplemental seminars tailored to meet the specific needs of a corporate client and is encouraged to submit curriculum to the Association for inclusion in a resource library. The Corporation further agrees that it shall only use seminar leaders approved by Mass ElderCare staff. Seminar leaders must be listed "on file" with the Association. Seminar providers will use participant evaluation forms and make the results available to the Association.

3) Corp Elderline Telephone Consultation Service: The Corporation agrees to conform to the Information and Referral Standards promulgated by the Executive Office of Elder Affairs and the Association.

4) Individual Employee Consultation: Standards for this service same as for private care management.

5) Private Care Management: The Corporation agrees to uphold the standards specified in the Association's private care management manual.

XI. Other Services

The Corporation may provide other eldercare services not specified in this agreement, as requested by companies and other purchasers and is encouraged to notify the Association of this capacity.

XII. Amendments

This agreement may be amended by mutual agreement of the Association and the Corporation.

XIII. Subcontracts

The Corporation shall not subcontract for the presentation or marketing of any product specified in this agreement without prior approval of the Association. The subcontractor must agree in writing to the standards, fees, and protocols as specified in this agreement.

XIV. Termination

This agreement may be terminated without cause by either party, subject to a minimum of sixty days advance notice by registered or certified mail to the other party.

XV. Term of Agreement

The term of this agreement shall be for the period January 1, 1992 to December 31, 1992.

XVI. Miscellaneous

This agreement represents the entire understanding of the parties, and supercedes all terms that may appear elsewhere. It will be governed by the laws of the Commonwealth of Massachusetts, and the jurisdiction of the courts of Massachusetts. The persons signing this agreement are duly authorized to do so by all necessary corporate or governmental action.

For the Association:

For the Corporation:

(date)

(date)

Mass ElderCare Seminar Evaluation Form

Mass ElderCare

24 Third Avenue, Burlington, MA 01803 Tel: (617) 272-7177 • FAX (617) 229-6190

SEMINAR EVALUATION FORM

ELDERCARE RESOURCES: WHAT ARE YOUR OPTIONS?

1. Rate your overall opinion of today's seminar:

Excellent Good Fair Poor

2. Were the areas which are particularly important to you...

Completely addressed Somewhat addressed Not at all addressed

3. The amount of material presented was:

Too much Just enough Insufficient

4. In my particular situation, the information presented was...

Very Useful Somewhat useful Not very useful at all

5. Please rate the following regarding the content and delivery of this seminar:

| | <u>Yes</u> | | <u>No</u> |
|---|------------|---|-----------|
| The seminar was well organized... | 1 | 2 | 3 |
| The material was understandable... | 1 | 2 | 3 |
| The seminar leader was well prepared... | 1 | 2 | 3 |
| The seminar leader had a thorough knowledge of the subject... | 1 | 2 | 3 |

PLEASE COMPLETE OTHER SIDE

A service of the Mass Home Care Association

6. What needs to be included in this seminar to make it better?

7. Additional comments...

MASS ELDERCARE

Corporate Evaluation Form

Mass ElderCare is committed to providing relevant, high quality programs and services to our corporate clients. In this regard, we would appreciate your feedback on the recent lunchtime seminar entitled, "Eldercare Resources: What Are Your Options?" Your comments will allow us to continue to improve our services to Massachusetts businesses and will be held in strictest confidence. Please take a moment to complete the five questions below and mail the form back to us in the enclosed stamped, self-addressed envelope. Thank you very much.

1) Do you feel the material presented in the session was helpful to your employees?

____ Yes ____ No

a. Which topic areas were most helpful? _____

b. Which topic areas were least helpful? _____

2) Do you feel the presenters were knowledgeable and professional?

____ Yes ____ No

a. Comments on presenters? _____

3) How would you rate the session overall?

____ Excellent ____ Very Good ____ Average ____ Below Average

4) How could we improve the presentation in the future?

5) Would you be willing to recommend Mass ElderCare to other companies?

____ Yes ____ No

Eldercare Revenue and Income Statement Spreadsheet

Seminar Series Seminar On-site Eldercare Info. & Referral Publications On-Site Support Groups Supervisor/Management Training Caregiver Fair

Revenues
 Program charge people/program
Total Revenue

Costs
 Labor charge/hr. # of hrs./unit total # of hrs.
 # of people
 Labor Cost/Unit
 Total Labor Costs
 Materials
 Cost per material # of materials
 Cost Per Unit
 Total Materials
 Travel Expenses
 Total Expenses
 Indirect Expenses
 Overhead Rate
 Total Indirect

Total Costs
 Per Unit
 Per Year

Total Profit
 Per Unit
 Per Year

Washington Business Group on Health
National Eldercare Institute on Business and Aging
777 North Capitol Street, NE, Suite 800 • Washington, DC 20002
202/408-9320 • TDD 202/408-9333 • FAX 202/408-9332



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