

☀ Case Study

Using Social Work Expertise to Market an Entrepreneurial Service

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Faced with the shrinking charitable dollar, many social agencies have begun to develop other sources of revenue. The drive to maintain the delivery of quality social work services in a harsh economic climate has resulted in such strategies as increased efforts to attract more private pay clients, seeking funds to serve special populations, aggressive grantsmanship, and the development of entrepreneurial services. Such services, relative newcomers on the nonprofit social work scene, challenge us to develop marketing strategies when all many of us have to fall back on is our clinical expertise.

Yet, as this case study illustrates, it is precisely those social work skills that can be used to advantage in marketing a program to the corporate world. In fact, the marketing success of Jewish Family Services can be attributed to following a clinical social work model that incorporated such elements as needs assessment, starting where the client was, and making use of the present moment.

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Jewish Family Services (JFS) is an agency dedicated to strengthening and preserving the quality of individual and family life in Baltimore's Jewish community. The agency helps people of all ages deal with a wide range of difficulties, such as marital conflicts, unemployment and financial crises, single parenting, death of a loved one, physical and mental illness, low self-esteem, and caring for a frail aged relative.

ENTREPRENEURIAL THRUSTS

During the past 3 years, the Aged Services Department of JFS has sought new sources of revenue enhancement. We are currently the primary Maryland contractor for the largest national elder care telephone consultation and referral service—Work Family Elder Directions of Boston—and are the local provider for a second national network, The Partnership Group of Lansdale, Pennsylvania. In that capacity, we offer expert telephone consultation for employees needing assistance in assessing their relatives' (or their own) needs. Individualized referrals with key eligibility information are provided. Through this program, we serve such corporations as IBM, AETNA Life and Casualty, Citicorp/Citibank, and Dupont.

Another entrepreneurial venture we have undertaken is with Lifeplans, Inc. of Waltham, Massachusetts. In this program we provide eligibility assessments on behalf of a long-term care insurance company that has contracted with the Family Caring Network (FCN) of Lifeplans. Ultimately we plan to provide case management, training, and quality control for other FCN subcontractors in the region.

We have also co-authored *More Than A Place to Live: A Training Manual for Man-*

agers of Housing and Health Care Facilities for the Elderly (published by Williams & Wilkins). This publication contributed toward our being chosen the successful bidder to provide management training throughout the state (sponsored by the Maryland Office on Aging). Training is provided for managers of both government-sponsored buildings, as well as those in the private sector that have a large proportion of senior residents. To date, we have completed five 3½-day training modules, with over 100 managers in attendance. An advanced day of training is in preparation.

As a private, nonprofit agency, JFS is governed by a lay board of community leaders. Our entrepreneurial endeavors were periodically presented to the group for their information. After one such presentation, a board member, whose company was in the real estate business and who belonged to a professional organization called the Home Builders Association of Maryland (HBAM), informed JFS of HBAM-sponsored seminars and training programs for their members. The board member suggested that JFS contact HBAM regarding its training manual for managers of senior citizen apartment houses, as well as the possibility of its making presentations to HBAM. Both the sale of the manual and the development of seminars for HBAM were potential sources of income for JFS.

We immediately followed up on the board member's suggestion. As with any clinical intake, we attempted to garner as much information as possible about the referral source—HBAM, its division, the Apartment Builders and Owners Council (ABOC), and ABOC's excellent Education Division.

THE PROCESS

Having a healthy respect for process and beginnings, our next step was to invite the director of the Education Division to our agency. At that meeting, the director clearly articulated her problem: the need to pro-

vide a training seminar for managers of housing for the elderly with the goal of helping them understand and relate to the problems and needs of this population. Having invited her to our "turf" so that she could get a sense of who we were, we then described in detail what we had to offer. In other words we were *marketing* our service.

The director had presented her problem (need), heard what we had to offer, learned what she needed to do to obtain our service, and now the question was: could we do business together? This scenario had a familiar ring: was it not the conceptual basis for all beginning clinical transactions?

As the meeting ended, we learned of one complication: the director had a lay board committee to whom she was responsible and who would make the decision about whether to contract with JFS. We would therefore need to meet with this group to sell our product. We readily agreed to do so.

In the course of our meeting we learned that the Education Division would shortly be sponsoring a half-day conference—"Managing Housing Developments for Midlife and Older Persons"—given by the owner and president of a real estate management firm. We asked if we might attend to get a sense of who the participants were, the scope of the content, and the manner of presentation; that is, to do an assessment. The director indicated that we were more than welcome.

The next step in the process was to attend the half-day seminar. Topics listed for discussion were

- Senior housing market: demographic, economic, and social characteristics
- Unique aspects of managing seniors
- Seniors' housing finances

The conference itself was a good one and the speaker was knowledgeable and articulate. Yet what struck us most vividly was the difference from our own training style with its emphasis on experiential learn-

ing and "feeling" the psychosocial aspects of aging. We had found our marketing niche!

The final step in the process was our appearance before the Education Committee of the ABOC board. We had many questions as we planned our presentation to this committee. How does one market to an affluent group of builders and owners? What materials should we take or create to sell our product? How should we present ourselves? We finally decided that we would be who we were—social workers with expertise in gerontology. We were allotted only 15 minutes for our presentation.

While being introduced by the Director of Education, we attempted to get a feel for the group and its composition. Both men and women were present, with most being in their forties and fifties. We observed a number of interactions as the committee assembled: who were the leaders and who were the followers. When the formal introductions were completed, one member jokingly said, "Maybe this will help me understand my father!" A second added, "Maybe it will help me understand what's happening to me!" Hearing these comments, we decided to discard our formal prepared presentation. Instead, we *started where the client was*.

THE EXPERIENTIAL EXERCISE

We asked all the committee members to take pen in hand—the one with which they *usually* did not write—and to record their name, Social Security number, automobile license number, amount of change on their person, and lastly a sentence on what they thought their own aging process would be like. They all participated vigorously, and a lively discussion ensued. They talked about memory loss, the frustration of the mind being faster than the body can respond, and the like. They spoke of their own aging—whether it would be done gracefully, slowly, poorly, etc. The presentation, which was to have lasted 15

minutes, then continued for an hour, at their insistence! We ended by pointing out that the exercise they experienced today was only a small component of the training that JFS did with apartment house managers.

We had dared to use an experiential exercise because in our own clinical work we value the use of time and the present moment, building on the situation as it presents itself. As a result of our successful risk taking we were awarded the contract, and several months later presented a conference, "Managing Housing for the Elderly: Knowing your Population."

Judging by the evaluations completed by the managers who participated in the conference, it was quite successful. In response to the question, "What did you find most useful or interesting?", the participants offered these comments:

- The segment on the myths and realities of aging; role playing
- The presentation on feelings and how to relate to elderly people as well as sharing ideas with other managers
- Excellent discussion on listening and relating
- Exchange of ideas
- Very interesting in every aspect
- Myths and realities test
- Great insight into attitudes (my own and others) regarding the elderly
- Communication skills useful in learning different ways to help the elderly
- Outstanding thought process and interaction between the group and speakers

Another benefit cited by the Director of Education of the Apartment Builders and Owners Council was that the conference made the managers feel good about the investment of their time and energy in ABOC's programs.

CONCLUSION

The development and ultimate success of the entrepreneurial venture enabled us to

gain confidence that our clinical knowledge and skills were adaptable to the corporate world. By using a social work approach—assessing the need, starting where the client was, and building on the present moment—we demonstrated the marketa-

bility of social work skills. At the same time, the image of the agency in the community was enhanced as we sold and delivered a product in which we believed to the corporate world using our social work expertise.