



La Pine Senior Center Strategic Planning

Spring 2018 • PPM 638 • Nonprofit Consultancy

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Acknowledgements

The consultancy team would like to thank the Board of Directors, staff, and members of the La Pine Senior Center, as well the city of La Pine staff and community members who took the time to provide feedback. Specifically, Joseph Page, (now Board Chair), Carol Zettel, Jamie Donahue, and Cory Misley were giving of their time and insight. This project would not have been possible without their support and enthusiasm.

About SCI

The Sustainable Cities Initiative (SCI) is a cross-disciplinary organization at the University of Oregon that promotes education, service, public outreach, and research on the design and development of sustainable cities. We are redefining higher education for the public good and catalyzing community change toward sustainability. Our work addresses sustainability at multiple scales and emerges from the conviction that creating the sustainable city cannot happen within any single discipline. SCI is grounded in cross-disciplinary engagement as the key strategy for improving community sustainability. Our work connects student energy, faculty experience, and community needs to produce innovative, tangible solutions for the creation of a sustainable society.

About SCYP

The Sustainable City Year Program (SCYP) is a year-long partnership between SCI and a partner in Oregon, in which students and faculty in courses from across the university collaborate with a public entity on sustainability and livability projects. SCYP faculty and students work in collaboration with staff from the partner agency through a variety of studio projects and service-learning courses to provide students with real world projects to investigate. Students bring energy, enthusiasm, and innovative approaches to difficult, persistent problems. SCYP's primary value derives from collaborations resulting in on-the-ground impact and expanded conversations for a community ready to transition to a more sustainable and livable future.

SCI Directors and Staff

Marc Schlossberg, SCI Co-Director, and Professor of Planning, Public Policy, and Management, University of Oregon

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About La Pine

La Pine is a small Central Oregon community located in Deschutes County. In the foothills of the Cascade Mountains, La Pine is surrounded by open meadows, lakes, and rivers. It has a long history dating back to French fur traders in the 1800s, but it was not until 2006 that the city formally incorporated. The seven square miles of La Pine represent the newest city in Oregon, and are home to a population of around 2,000 residents. According to the La Pine Chamber of Commerce, Deschutes County has experienced the most rapid growth of any county in Oregon over the last decade. La Pine itself is experiencing significant growth in both population and economics. Key industries contributing to this growth include technology and biotech, recreational and outdoor gear manufacturing, brewing and data centers. As an emerging Oregon city, La Pine is in a unique position to develop and enact sustainable practices for its future.

La Pine is the first ever Small City Pilot for the University of Oregon Sustainable Cities Initiative's Sustainable City Year Program (SCYP). Through this partnership, multiple university courses in areas such as journalism, business, architecture, and more have provided tangible recommendations for the city of La Pine to incorporate into its future development plans. As a small city, La Pine balances day-to-day needs and long-range planning, making it an ideal location for the infusion of energy and new ideas.

The SCYP Small Cities Pilot is made possible in part by a grant from The Ford Family Foundation. These initiatives and outcomes from participation with SCYP will help develop ideas that are cost-effective to build and operate, provide safe and convenient access, and achieve sustainability goals while supporting La Pine's projected growth in population and employment.

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This report represents original student work and recommendations prepared by students in the University of Oregon’s Sustainable City Year Program with the City of La Pine. Text and images contained in this report may not be used without permission from the University of Oregon.



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From left to right: Agraj Dangal, Professor Dyana Mason, Susan Ordonez, Jenn Casey

Executive Summary

This paper is presented to the La Pine Senior Center and the city of La Pine by the University of Oregon's spring 2018 Nonprofit Management Consultancy capstone course. A team of three graduate students spent a ten-week term interviewing stakeholders, researching the organization and the market, performing an analysis, and ultimately providing recommendations to increase efficiency and sustainability of the La Pine Senior Center.

The La Pine Senior Center is in a time of transition. With a new Center Director and restructuring of the Board of Directors, it has the opportunity to create a new membership structure, and consider new revenue opportunities.

This report contains an overview of the organization, the project scope, research methods, an analysis of the organization's current position, and recommendations.

Through interviews with Senior Center and city of La Pine stakeholders, understanding the mission, purpose, and activities of the organization, and through research and analysis, the team narrowed down key areas to focus on:

- Board Governance Efficiency
- Creation of Membership and Partnership Levels
- Revenue Generation Opportunities.

This report including the supporting documents and appendices are intended as a guide for the La Pine Senior Center Board of Directors and Center Director and to benefit its members.

Introduction

Senior Center Mission

The La Pine Senior Center provides community, friendship, and resources to older adults in the La Pine area.

More formally, the current bylaws in Article II state that the purpose of the organization is:

Section 1. To develop and maintain an active senior citizen program in the greater La Pine area which includes Southern Deschutes and Northern Klamath counties. To encourage older adults to use their skills, develop their potential and continue their involvement in our community.

Section 2. To add to the quality of life for seniors by creating senior programs that will be inviting enjoyable, including recreational activities, entertainment and informational programs on nutrition, health and welfare programs.

Section 3. To develop volunteer opportunities for all interested individuals in all aspects of our program.

Organization Overview

The Senior Center was incorporated in 1986 and has been serving La Pine and the surrounding areas for decades. In 2006, the doors to its permanent home opened after the organization and community fundraised the resources to construct the building. In 2013, the county gifted the land to the Senior Center. The property and the building are now owned, debt-free, by the nonprofit corporation.



The town of La Pine has approximately 1,850 residents, approximately 43% of which are over the age of 50. In the surrounding area, ZIP Code 97739, there are 11,018 residents, approximately 50% of which are over the age of 50.

As a membership organization, members pay an annual membership fee in exchange for membership benefits. Until the 2018 Annual Member Meeting in May, membership was only open to those 50 years old and older. At the Annual Meeting, members voted to eliminate the age requirement.

The Senior Center provides activities and services for seniors in the La Pine area and offers a place to spend time with others in the community. The location is centrally located, open to members and non-members, and has spaces for meetings and events. The building provides a revenue opportunity through renting to outside organizations.

Until recently, the organization was run entirely by volunteers, primarily long-term volunteers and board members. In August 2017, the organization entered a transition period when it decided to invest in hiring its first paid Center Director. In addition to the one paid Center Director, there is a part-time chef.

During this time, the organization began working with a consultant to improve its operations and to organize the finances and ensure they were up-to-date. In addition, they confirmed a long-time volunteer, Joe Page, to the Board of Directors; in May, Joe was elected Board Chair.

Scope of Work

The scope of work was originally directed from a written project description that focused on board development. As conversations with Senior Center stakeholders evolved, it became apparent that the organization was already on a trajectory of change, including major initiatives in motion to be voted on at the Annual Meeting that directed the focus. The motions were: The nine (9) member Board of Directors in the bylaws changed to five (5) elected Board of Directors, effective immediately.

- The removal of the 50 years of age requirement for membership.

These changes, combined with the need and opportunity for the Senior Center to generate revenue, informed the analysis and recommendations in this report. Recommendations are focused on the following questions:

- Board Governance: How can the La Pine Senior Center Board of Directors improve its oversight and the overall efficiency of the organization?
- Memberships and Partnerships: How can the organization capitalize on the change in membership age to increase participation in activities and use of facilities by community members while retaining a focus on serving seniors?
- Revenue Generation: How can the Senior Center board and staff increase the financial sustainability of the organization and provide for future growth?

This report also includes a brief section on change management. Through conversations and observations, it is apparent that for some members, change is happening very quickly. The overview provides the Board of Directors and staff with guidance on how to handle change within leadership and among membership.

Research and Process

Research

The initial project description, along with early conversations with key stakeholders, informed the direction of the work. Board Governance emerged as a clear focus. Research, analysis, and interviews determined additional areas of focus.

Below are the key methods used for research:

- Initial interviews with key stakeholders (phone and in-person)
- Site visit to the La Pine Senior Center
- Project description
- Online research: senior centers, membership structures, social media
- Attendance at annual membership meeting
- Document review of provided and gathered materials

Initial Interviews

The consultancy team interviewed Cory Miskey, La Pine City Manager, on the University of Oregon campus. This conversation provided insight into the history, challenges, and opportunities of the Senior Center, as well as the possibility of a stronger relationship with the city.

After the initial conversation with Cory Miskey, the team had a call with Joe Page, then the newest member of the Board of Directors, and a long-time volunteer with the Senior Center. Since this interview, Joe Page has been named Board Chair. Carol Zettel, a long-time La Pine community member, who is currently serving as a consultant, also participated in the interview. Outcomes of the call included background on the recent history of the organization, changes the Senior Center is undergoing, current staffing updates and future needs, and challenges the organization is facing.

Onsite visit

The consultancy team visited La Pine and the Senior Center May 2, 2018 to meet with stakeholders and better understand the environment of the Senior Center and La Pine.

Meetings with individuals included the below:

- Board of Directors members
- Carol Zettel, consultant and community member
- Don Greiner, former Board Chair and current City Councilor
- Jamie Donahue, Center Director
- Casual/Passing conversations with people attending the lunch

Each team member sat at lunch with different groups of people, each included members and non-members.

The visit also included a driving tour of the city of La Pine, with a stop at city hall for a brief meeting with Cory Miskey. The onsite visit allowed for observation of a variety of activities at the Senior Center including lunch, chair yoga, and quilting.



Annual Member Meeting

Attendance at the Annual Member Meeting on May 8, 2018, allowed for observance of the votes being presented at the meeting and the conversations that happened about both the elimination of the membership age and the downsizing of the Board of Directors.

While the vote on the new Board structure passed with 49 yes votes and 5 nos, the margin in the age requirement vote was narrower with 38 yes votes and 17 no votes. Attending the annual meeting allowed for observation of the lead-in discussions to the votes, concerns of some of the members, and the accolades and as stated by a voting member, affirmation of the hiring of Jamie Donahue as the “best decision the Center has made in years.”

Document Review

To better understand the organization, its history and how it is governed, the team reviewed several internal documents. The documents provided or researched included:

- La Pine Senior Center bylaws and Annual Meeting Notice and Announcement
- La Pine Senior Citizens, Inc. Policy Manual
- Past three years of available IRS Form 990s (2014, 2015, 2016)
- Rhubarb Festival Sponsorship Letter
- Online presence, including website and Facebook page

General Research

The consultancy team conducted additional research to find Senior Center comparators and/or best practices that would act as a guideline for the La Pine Senior Center. While directly comparable organizations were not found, what was found included:

- Many senior centers are funded by or have a more structured relationship with the city or county, which provides resources and/or funding.
- Organizations that serve smaller populated areas like La Pine often don't have a website or as strong of an online presence as the La Pine Senior Center. The La Pine Senior Center is active, has a good web presence (especially with April 2018 update), and actively connects with the community on social media.

SWOT Analysis

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis is used to evaluate an organization to better understand its place in the market, what it does well, and where it can improve. The SWOT framework provides a visual way to consider what an organization may choose to continue to do and places to improve. Below is an overview (SWOT Matrix) and more detailed analysis.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Community and local government/agency support • Active membership • Debt-free building and property • Jamie Donahue, Center Director 	<ul style="list-style-type: none"> • Operating margins are slim • Limited external funding • Aging volunteers • Currently Board is not strategically focused
SWOT	
<ul style="list-style-type: none"> • La Pine area population • Affordable Senior Housing next door and new housing is in development • Community and business partnerships 	<ul style="list-style-type: none"> • Lack of population density • La Pine Park and Recreation District has similar space and provides services
OPPORTUNITIES	THREATS

SWOT Matrix

Strengths

La Pine Senior Center has great support from the community. The membership and community raised the \$600,000 (from 1999-2004) for the building construction, which is testimony to the dedication and support from the community

Inclusion of the Senior Center in the Sustainable City Year Program by the city of La Pine suggests that the city is interested in the growth of the organization and values the role it plays in the community. Observation in meetings with the city manager, council members, and other representatives show a positive relationship between the organization and the city’s leadership.

There is a positive attitude among the volunteers and the general Senior Center community, including the Board of Directors. Their value of the Senior Center, combined with a good reputation in La Pine and the surrounding area, attracts volunteers, participation, and users of the activities and community the Senior Center provides.

The Senior Center owns the building it occupies and the land it sits on without any debt. The building is well maintained and is located in accessible area in the center of the city of La Pine. Additionally, it is near local senior living facilities.

The building offers the potential of generating additional revenue. The space can be divided, and can accommodate a variety of events, meetings, and other community uses.



Since Jamie Donahue was hired, there is a new energy, enthusiasm, and structure at the Center. In the short time she has been a part of the organization, use of the building has increased and programming has expanded (chair yoga, paint nights, etc.). Social media (Facebook) has also become more active and engaging. Jamie has also started to provide a more consistent structure to pricing for use of the building.

Weekly Bingo nights are revenue generators for the Center and offer an opportunity for community building. Bi-weekly Tuesday Bingo events are also revenue generators.

Three times a week the Center provides lunches, which are a benefit of membership, providing community gathering and healthy lunches for its members.

Weaknesses

Currently there is no strategic plan.

Members of the Board of Directors need to be able to shift from being day-to-day volunteers to being focused on strategic direction when in their role as a Board member. Currently, there is significant overlap that leads to worrying about operations instead of strategic direction and financial sustainability.

There is limited financial support from municipal sources. Currently the city of La Pine occasionally rents space but does not have a formal relationship as other senior centers do across the state and the nation.

Although the center now has a full-time paid Center Director, there is limited staff to maximize the opportunities that exist for building use and revenue generation.

Existing membership is uncertain of change. Currently there is no consideration of how to strategically manage change.

Limited financial resources. Inadequate operational budget and limited cash flow prevent the organization from being able to afford multiple paid staff positions. Active volunteers have been sustaining major activities in the center.

With monthly expenses of \$9,000, the fiscal margins are narrow compared to the revenues. While the building is paid off, there is maintenance and other ongoing expenses. Additional reserves would provide fiscal stability.

The organization has done limited philanthropic fundraising but does not currently have the capacity to do this.

Opportunities

Though the population of La Pine itself is less than 2,000, the greater La Pine area (zip code 97739) has a population of 11,018. Some Senior Center members commute ten miles to attend lunch and other activities. The center can capitalize on interest and enthusiasm of the senior population in the area, as Census data shows more than 50% are over the age of 50.

There is an affordable senior apartment complex next door with 55 units. Estimates show that less than half of its residents currently use the Senior Center, which leaves potential users of the services less than 200 feet away. More housing construction in the area will bring more potential members.

The building is being used to support programs like Meals on Wheels, which are important to the health of the senior population. In addition to providing meals to the target population, this is a revenue source as meals are subsidized by the Council on Aging. Volunteer leadership efforts on collaboration with the local school groups in recruiting volunteers provides an avenue for potential senior-youth team-up projects.

Threats

The city of La Pine is sparsely populated and because senior citizens are the Center's major clients, mobility issues and unfavorable weather conditions pose a threat of reduced participation in Senior Center events.

The La Pine Park and Recreation district provides similar space options for building rental and revenue and is the main competitor for groups seeking to rent space.



Board Governance Analysis and Recommendations

Background

During the past year, the day-to-day management of the organization has changed and required the Board of Directors to provide more oversight than in the past. Part of this transition included seeking advice from a consultant and relying on a broader set of volunteer leadership. With the hiring of Jamie Donahue as the Senior Center Director, there is new energy, and an increase in both the number and range of activities at the Center.

Throughout this time of transition at the Center, board members and the consultant recognized that the Board of Directors could be more structured and efficient in how they govern and oversee the organization. For a variety of reasons, including the lack of applications for vacant positions, a member vote was initiated to reduce the amount of Board of Directors from nine to five.

As a result of this vote, six board members will serve until term limits expire for three board members on April 30, 2019. This number will be reduced to five members beginning in May 2019, when there will be an election at the Annual Meeting to fill the two vacant seats.

Because of this change in the number of directors on the Board—and in tandem with the vote to eliminate the age requirement for membership—it is an opportune time for the Board to consider how to become a more efficient and structured Board of Directors.

Recommendations

Board Training and Development

It is recommended that Board members have a minimum of eight hours a year of Board of Directors training and development. In the first year it is suggested that the six Board of Directors and the Center Director either attend a training or have a trainer come to the Center. This could be conducted during two half-days or spread out over a longer timeframe. While there might not be budget currently allocated for this training, the benefit of having a visionary Board focused on the efficiency and sustainability of the organization will benefit the Board members and the La Pine Senior Center in the short- and long-term.

This will allow for members of the Board of Directors to understand their duties and roles as a director, while also providing an opportunity to think more strategically about how the actions of a Board impact an organization. It is recommended that this training be led by a professional outside of the organization, who specializes in board development and training. Possible training organizations and grant funding are provided in Appendix B.

In addition to the initial training, it is suggested that there be one agenda item each meeting dedicated to Board Development. For each meeting, this could be simply reviewing a component of the annual training or having a brief discussion on strategic progress.

Board of Directors role: Oversight of the Organization

It is natural that members of the Board of Directors have also been day-to-day volunteers for the Senior Center. Some have been members and volunteers for many years, have been an important part of the membership, and the Center has been an important part of their lives.

While it is easy to get emotionally connected to programs, the history, and the people of the organization, it is important that a Board of Directors member has the ability to separate the day-to-day volunteering roles with their role as a Board of Director. The role of a Board of Director is to be strategic and provide oversight.

Structured and Focused Monthly Board Meetings

Monthly Board meetings are required in the bylaws. It is recommended that these meetings take place during the same week and day of each month (for example, second Tuesday of every month at 4-6 p.m.). This will allow Board members to plan their schedules around the standing appointment should also allow the Chair and staff to know when they need to prepare for the meeting.

The week before each meeting, it would be beneficial to have an agenda provided to the Board of Directors by the Board Chair, either via email or hard copy, with suggested additions to the agenda accepted by 5 p.m. the day before the meeting. Any documents that will be reviewed or referred to in the meeting should also be sent to the Board members prior to the meeting.

At the end of the monthly Board meeting, it is recommended that next steps be summarized and agreed upon and be included in the minutes by the person identified to take record the minutes of the meeting. The minutes can then be circulated in the following two days after the meeting and kept in an electronic file accessible by Board members.

Revision of Bylaws

During the 2018 Annual Meeting, Don Greiner announced that a local attorney will be reviewing and updating the bylaws under the guidance of the Board of Directors. We recommend avoiding rushing this process so that it can be thorough, thoughtful, and inclusive. According to Robert's Rules of Order (Appendix A), a separate committee should be appointed to review and approve the bylaws. This committee should represent many viewpoints and include the "most interested and vocal people" and the at-large membership should also have a place to anonymously submit suggestions and concerns. By having a large committee and allowing for input, any disagreements or explanations can be resolved at the committee level prior to going to a vote.

There are two different approaches to updating the bylaws: revision or amending. It is recommended that the approach be decided by how significant the changes are expected to be and then determined if it's a revision or amendment of bylaws. Changes to the La Pine Senior Center Bylaws can be voted on at a special meeting or at the 2019 Annual Meeting.

Member Meetings

There is currently just one member meeting per year. While both motions presented at the 2018 Annual Member Meeting ultimately passed, there was a concern that one might not pass—the member age requirement. The narrow passing of the age requirement motion indicates that opinions can be better understood and there is an opportunity to better communicate with members.

Holding three quarterly Membership Listening Meetings would allow members a platform for to be heard on a more consistent basis. This would mean adding three additional meetings in January, August, and November to the Annual Membership meeting in the first week of May. These meetings would be one to two hours and provide the opportunity to listen to membership and discuss any topics before they become issues. These could be held after a planned lunch, offering additional refreshments or some incentive to stay.

Membership Analysis and Recommendations

Background

The La Pine Senior Center is a membership organization. Although the Senior Center serves all seniors in the La Pine area, members receive benefits in exchange for annual dues and are able to vote in organization-wide meetings on issues that impact the organization. At its peak, there were more than 300 members, but during the past few years, membership has dropped to 144 people. Those interviewed for this project attributed the decline in membership to members passing away, increase in membership dues, and the organization not actively engaging new members.

Previously, membership dues were \$24 annually. In the beginning of 2018, the Board of Directors voted to increase membership dues to \$40 per person, per year. Dues support the activities and operations of the Senior Center. With the vote to eliminate the age requirement for membership, it is vital for the Senior Center to redefine membership.

Recommendations

Engage Current and Potential Members

Organizations “building lasting relationships, using member networks, and developing benefits with high value as a way of enhancing loyalty and boosting engagement” are finding success with the membership model. The key concept to increasing Senior Center membership is to create an organization that aims to engage, rather than simply focus on the revenue generation aspect.

Best practices for membership acquisition for the Senior Center to keep in mind include:

Focus on creating a relationship with all members. Viewing a membership transaction as the beginning of a relationship will help with retention efforts.

How Senior Center can do this: The Senior Center staff, board, and volunteers do a great job of getting to know the seniors that participate in their programs, actively greeting new folks, and welcoming returning members.

Capitalize on the desire for affiliation. The Senior Center is in a position to create a sense of community and connection for seniors in the La Pine area.

How Senior Center can do this: The Senior Center has already set themselves up as a place for seniors to connect and engage in community activities. Marketing this aspect of membership may help with acquisition efforts.

Offer a variety of opportunities for engagement. This includes offering several types of activities for members, engaging members in volunteer roles, and sharing news.

How the Senior Center can do this: The Center Director is focusing on expanding programming and activities at the Senior Center and the organization engages several volunteers.

Continuing to focus on these activities is a great way to keep members engaged. Combine this with the previous best practice by engaging current members in opportunities to share the benefits of the Senior Center with their own networks through “bring a friend” activities, or asking long-time members and volunteers to bring a new person to lunch.

Revisit and update membership benefits. Regularly revisit membership benefits to ensure that they are relevant and appealing.

How the Senior Center can do this: Allowing members to provide feedback on benefits at annual meetings or proposed quarterly member meetings is a way to help gauge relevance and identify new ideas. It provides the additional benefit of assuring the members feel included in decisions about their membership.

Make renewal easy. It is easier to keep a member than to convince a new person to join. Renewal should not be a barrier to continuing membership.

How the Senior Center can do this: Provide reminders or a regularly scheduled time for membership renewal. If a large portion of membership renewals are clustered around a certain time, implement a membership renewal drive during that time period. It will remind members to renew, as well encourage them to remind each other.

Implement Membership Levels

It is recommended the Senior Center implement different membership levels. This will allow the Senior Center to engage with different community members while providing benefits to different age and membership levels. While the removal of the age requirement opens the opportunities for membership, the membership focus remains on the traditional senior-aged users and member.



Individual Membership Levels

Golden Senior Membership

Rationale: The Golden Senior membership level encourages seniors 80+ to stay active and involved. The annual fee lowers to show the Senior Center understands that some community members live on a fixed income. There is an additional benefit of being able to rent the Senior Center for a family reunion at no cost to recognize that as seniors age it becomes harder to travel to visit family.

Golden Senior

Age: 80+ years old

Fee: \$30 annually

Benefits: \$4 suggested donation for lunches, free activity class, 10% discount on space rentals, one family reunion event per year at no cost, memorial services at no cost

Silver Senior Membership

Rationale: This is a continuation of the current Senior Center membership. In addition to defining an age range, benefits of what is included in membership are outlined.

Silver Senior

Age: 50-79 years old

Fee: \$40 annually

Benefits: \$4 suggested donation for lunches, Free activity classes, 10% discount on space rentals, memorial services at no cost

Community Membership

Rationale: The Senior Center membership recently voted to expand membership to community members under the age of 50. By creating a separate membership level for community members, the Senior Center is able to include community members. The additional \$5 in the annual fee allows for a separation in cost from the senior memberships, emphasizing the priority in senior membership.

Age: All ages through 49 years old

Fee: \$45 annually

Benefits: Discounted activity classes, \$4 suggested donation for lunches, 10% discount on space rentals

Student Membership

Rationale: Having a student membership level will encourage school age children and college students to be involved in the Senior Center. As students get involved at the Senior Center, they learn more about the senior community in La Pine, have a place to go during breaks, and add youth to the membership. Additionally, it provides students with volunteer hours necessary for high school and college requirements.

Age: K-12 and college students

Fee: 8 volunteer hours per month (2 hours per week)

Benefits: School break lunch packages and activities at discounted pricing

Business Memberships Rationale

In addition to community memberships, implementing business memberships is recommended and projected as a way to create revenue. Pricing indicated is a guideline to illustrate the membership types.

Supporter

Rationale: This allows businesses to support the Senior Center with benefits including advertising and periodic space rental. This membership level is ideal for a supporter who uses the space for a couple events per year.

Fee: \$600 per year

Benefits: Building use 8 hours per year, 10% discount for all other uses, mention on Senior Center website as supporting member.

Business Partner

Rationale: This membership provides an opportunity for community businesses to support the Senior Center while also getting access to some membership benefits. This membership level is ideal for a supporter who uses the space for a few events per year.

Fee: \$1,000 per year

Benefits: Building use 12 hours per year, 10% discount for all other uses, Rhubarb Festival booth, mention on Senior Center website as business partner.

Silver Partner

Rationale: This allows businesses to support the Senior Center with benefits including advertising and periodic space rental. This membership level is ideal for a supporter who uses the space on a regular basis.

Fee: \$2,500 per year

Benefits: Building use 2 hours per month, 10% discount for all other uses, Rhubarb Festival booth, page ad in each Senior Center newsletter, mention on Senior Center website as a silver level partner.

Gold Partner

Rationale: This allows businesses to support the Senior Center with benefits including advertising and regular space rental. This membership level is ideal for a supporter who uses the space on a weekly basis.

Fee: \$5,000 per year

Benefits: Building use 1 hour per week, 10% discount for all other uses, Rhubarb Festival booth, page ad in each Senior Center newsletter, mention on website as gold level partner.

Potential Partnerships

Though La Pine has more than 190 businesses in the area, the Senior Center currently only partners with seven. There are businesses that rent event and meeting space at the Senior Center on a regular or ad hoc basis, including some that have recently been increasing their use of the building.

There is opportunity to create business memberships for local businesses and community organizations to financially partner with the Senior Center. The Senior Center has already started to formalize consistent pricing guidelines for use of the building. Business memberships can be an extension of work already being done. These business memberships would create a consistent structure for partnerships. Business membership allows partners to use the building, as well as access other benefits like a sponsored table at major events like the Rhubarb Festival and advertising in the Senior Center's newsletter.

The Senior Center can begin by reaching out to businesses already using the building on a regular or increasing basis. In addition, the Senior Center Board of Directors and staff can continue reaching out to businesses that have expressed interest in supporting the Senior Center and its activities. A list of potential partners is identified in Appendix C, which includes businesses within the city of La Pine.

Revenue Generation Analysis and Recommendations

Fundraising

The La Pine Senior Center is a 501(c)3 and one opportunity to generate revenue in this structure is through fundraising. The Senior Center has not had a significant fundraising campaign since the efforts to raise money for the new building, which opened in 2004. In order to effectively fundraise, it is recommended the Senior Center develop a specific campaign or initiative. Ideas for fundraising campaigns include a campaign to support the maintenance and/or expansion of the building, specific program development ideas, or transportation vehicles for senior activities.

In order to accomplish this, cultivation and donor relations tactics will be important and part of the strategic planning process. Donor relations and fundraising is an important part of any 501(c)3.

Some ideas to begin creating a foundation to fundraise are included below. These can be explored in more detail, but for context and consideration, this is how fundraising efforts are started:

- Creating a donor list that includes mailing addresses, email addresses and other essential donor data.
- Communication with donors on a regular basis (at least twice a year) via newsletter updates, annual reports, and thank you cards.
- Including fundraising as a board priority that is addressed in one of the Board development sessions and in the strategic planning.

Grants

Grants have been considered and previously researched for the La Pine Senior Center but there were not resources to write and submit them. It is suggested that grant research and writing be included and prioritized in the strategic planning process and Board Development and Training, realistically determining available human resources and if there is time to commit to complete. Considerations are below:

- Dedicate human resources (paid or volunteer) for the process of grant research, writing, and follow up.
- Research grants offered by local government including city, county, and state government; federal government; international agencies; foundations; and other non-profits.
- Follow-up on documents created by former personnel on grant writing and proposals.

Partnership Revenue

The Senior Center partners with various businesses in and around the La Pine area. These partnerships generally include use of the building and sometimes participation in onsite events. In addition to the various Business Memberships discussed previously in the Membership section, there are separate opportunities to create revenue. Examples of these are the Rhubarb Festival, the Gun Show, and the Car Show.

Packages for different events and sponsorships can include benefits such as the below:

- Inclusion of logos and branding in advertisements in newsletters, bulletin, calendars, flyers, etc.
- Building rental benefits/inclusion in sponsorships
- Access to members via events or advertising opportunities
- Booth/tabling priority place at events

The membership section above highlights opportunities for multi-tier collaboration with organizations connected to the Senior Center or who regularly use their space. Appendix C provides a list of possible businesses to approach about beginning a partnership with the Senior Center.

Programs/Events

The Senior Center offers a variety of programs for members and the community. Current programs are focused on providing daily activities for seniors. It is suggested the Senior Center form a committee to evaluate existing programs and research potential programs. We recommend that this committee is made up of members and volunteers, and reports to the Center Director. This ensures the balance of authority, responsibility, and accountability. New programs should be designed to pay for themselves or be a member benefit.

Following are ideas to enhance and add new programs:

- Survey members to understand attitudes toward activities currently offered, preferred
- programs, and potential programs they are interested in.
- Classify current programs and rank them using the following:
 - Percentage contribution to the total revenue.
 - Number of community members and actual members involved.
 - Cost incurred while organizing the programs and calculate return on investment for each program.
 - Increase advertising to encourage participation in current programs
 - Create programs that will engage the senior membership levels and bring together younger members of the community.



Building Use and Events

The building and the property are the primary assets of the Senior Center. Currently the building is used for various purposes such as: lunch three times per week, quilting groups, administrative space, rent to outside organizations (Weight Watchers, Grief Counseling, etc.), and a recreational space for senior members of the community. Events such as Rhubarb festival and Car Show attract visitors on a larger scale.

Ways to increase revenue through use of this space:

- Work together with the city of La Pine, Deschutes County, and Chamber of Commerce to include the Senior Center on list of spaces to rent in La Pine.

- Continue with activities and large scale events such as the Rhubarb Festival, Gun Show and Car Show.
- Continue successful events such as paint night, chair yoga, and Bingo.
- Conduct annual surveys among members and non-members who are active users of the Senior Center to determine what is working or not working.
- Maintain separate records for building usage per hour for data generation. This includes internal, external, commercial, and non-commercial usage.
- Strictly follow standard rates and account for discounts according to the user's membership level (membership benefits are in the Membership section above).
- Position the building as a community space that was built by the community for the community.



Change Management

The Senior Center is in a time of significant change. Transitions are always difficult. As John Kotter, a change management expert says, “People don’t change a minute before they’re ready.” The members of the Senior Center have shown significant trust in the Board and staff of the organization by voting in favor of the changes that are already happening. As they continue to move forward with the recommendations provided, there will necessarily be some hard transitions as people get used to the new things happening at the Senior Center.

How businesses going through significant transitions treat their workers during a time of change is a main determinant of the success of a new initiative. This can be expanded to how a membership organization treats their members through times of change. As such, we wanted to provide the staff and Board with some strategies for helping their members through this transition.

There are four key factors that indicate the success of a change program:

- Duration. Not all of the recommendations indicated in this report need to happen at once. Strategic Planning will help prioritize recommendations. Studies actually show that long projects are more likely to succeed than a short project, as long as the leadership regularly goes back to review their progress.

- Integrity. Great changes need to be given proper attention to succeed. As the Board defines their role, they can begin to allow the Center Director to take on more of the day-to-day operation of the Senior Center as they set the direction of the organization.
- Commitment. The Board plays a huge role in transformation efforts. Having open lines of communication with the membership about the direction of the Senior Center and the public support of all the Board members will make any change efforts more likely to succeed.
- Effort. Change takes a lot of work and the Board must pay attention to who is bearing the brunt of the efforts. It is essential to delegate out some ideas and activities for implementation if one person is taking on too much.

As the Board and staff lead the Senior Center through this time, here are a few strategies to keep in mind:

- Reinforce how the change will benefit the Senior Center. By talking about changes in terms of being opportunities to advance the mission and values of the organization, it encourages people to think of the changes as something that will improve the organization.
- Involve the members in the implementation of changes. The Senior Center has passionate, committed volunteers and members. Their feedback and involvement in implementing innovative ideas and activities is recommended. This can happen through conversations in Membership Listening meetings, through a written questionnaire, an idea box, etc.
- Listen to the concerns of those who are unsure of or oppose the changes. It is important to hear why they oppose it, as other members may feel the same way. Understanding their reasoning helps the Board and staff to identify potential barriers and solutions.

Not everyone in the Senior Center will be ready for immediate change. By emphasizing the positive impact the changes have had on the Senior Center and ensuring members have the opportunity to be involved in the changes, the Board can guide members who are unsure of the transition to get on-board with changes. The most important thing for the board to remember: “You can’t force people to change-you can only help them want to.”

Conclusion

The leadership of the La Pine Senior Center is embracing growth and change. With community support and dedicated volunteers, the Board of Directors is ready to move beyond day-to-day operations of the Center and engage in more strategic planning and building a more sustainable financial model. The consultancy team’s intention is that the Senior Center can use the recommendations provided to build a robust membership, a more efficient Board, and develop revenue generation ideas.

Recommendations for the Board of Directors are intended to help the Senior Center with board development and recruitment. Training and a focus on strategic oversight of the organization will help the Board to focus on the direction of the organization. With membership newly opened to community members of all ages, membership levels will help define what that looks like while keeping the focus of the organization on seniors, which is important to the current membership and the Center’s mission.

Implementing clearly outlined business partnerships will assist the organization with revenue generation. This new revenue, in conjunction with fundraising and applying for grants to help fund the organization, has the potential to be a steady supplement to program and event rental revenue already coming in to the organization. This diversification of funding sources will provide more financial sustainability for the organization.

The Senior Center has incredibly dedicated volunteers and Board members. With the help of new staff, these volunteers will play an essential part in helping the organization thrive. The volunteers and staff will also continue to provide a place for seniors to relax and connect with one another and the community.

We hope that the La Pine Senior Center continues to flourish and grow, providing community for the seniors in the La Pine area for many years to come.

Appendix A: Robert's Rules of Order

(excerpted from Robert, G. H. M. (2014) original 1921. Robert's Rules of Order Revised: Simplified and Applied, pages 312-316)

Article IX. Amending the Bylaws

This article provides a means for making changes in the bylaws. Amending the bylaws should require previous notice and two-thirds vote. If no provision for amending is in the bylaws, the bylaws can still be amended by use of the motion "*Amend Something Previously Adopted.*" However, the exception to this motion is that bylaws always need a two-thirds vote even when previous notice is given. If the bylaws provide that notice is given, the bylaws should state when it is to be given—at the previous meeting or in the notice of the meeting, or so many days prior to the meeting.

In prescribing the vote for the adoption of the bylaws, it should just state a "two-thirds vote" and not a "two-thirds vote of the members."

Other Bylaw Provisions

Organizations may need to have other articles in the bylaws to meet their needs. The information in this chapter is just a basic outline for all organizations. Other clauses that your organization may want to include are a dissolution clause, which states what happens to the money or any property that the organization owns upon dissolving. For non-profit organizations, state law may require an *indemnity clause*, which provides legal exemptions from penalties or liabilities incurred by one's action in office. An attorney helping create a corporate charter can also help with this. If members are having a difficult time writing the bylaws, hiring a parliamentarian can be of great help.

When writing bylaws, keep the language simple and straight-forward. Do not use legalese or duplicate words with slightly varying shades of meaning like "null and void" or "confirm or ratify." Write each sentence so that it is impossible to quote it out of context. The complete meaning should be clear without making the reader refer to preceding or following sentences. Include exceptions or qualifications within the sentence to which they apply.

When an organization is brought into existence, the first bylaws should be simple and to the point and should include only what is necessary to begin functioning as an organization. As the organization grows and problems arise, the organization can amend the bylaws to meet its needs. Foreseeing all the problems that will arise or how the organization will develop is impossible. Therefore, members should periodically review their bylaws to see if they need changed. Reviewing the bylaws is an opportunity for members to be honest with themselves about whether the bylaws meet the organization's current needs.

Proposing amendments can usually solve most bylaw problems. However, over time an organization may make so many changes to the bylaws that a complete revision of the current bylaws is necessary.

Revising the Bylaws

If an organization decides to revise the bylaws, it should appoint a large committee with the most interested and vocal people. The committee members should represent many viewpoints. Those members of the organization who would ask questions and propose many amendments at a bylaws meeting should also be appointed to the committee. This way, committee members can work out any disagreements at the committee level and not during the presentation to the entire membership. Ask the entire membership to submit suggestions to the committee, and consider all suggestions carefully. There is no room for politics on the bylaw review committee. When the committee is done with the proposed revision, it needs to present the revision to the membership according to the amending procedure defined in the bylaws. Because a revision is a proposed replacement of the current bylaws, the organization should send a copy of the revision with a letter explaining the proposed major changes to the members.

The first thing members need to understand about a revision is that the current bylaws are not under consideration at all. If the revision is defeated, no changes to the current bylaws take place. If members like certain things in the revision but reject the revision as a whole, they have to propose the sections that they like as amendments to the current bylaws.

The second thing to remember about a revision is that it is like presenting new bylaws for the first time: Everything in the proposed revision is open to change by the membership, not just the changes that the committee proposes making to the previous bylaws.

Third, although not voted upon in this manner, the bylaw revision is usually considered, presented, discussed, and amended article by article (or *seriatim*). After all the articles are read, discussed and amended, the revision as a whole is opened up for discussion and further amending. This way, if something in Article V is changed and it affects something in Article II, the members can return to Article II and fix it before voting on the amended revision.

Presenting a bylaw revision at a special meeting or series of special meetings is best. This way, members can consider the document carefully. At the first meeting, the chair should ask the bylaw committee chairman to give a report. At the end of the report, the chairman states, "By direction of the committee, I move the adoption of the bylaw revision." The chair then places the motion before the assembly and asks the bylaw committee chairman to read Article I and explain the changes and the reason for them. After this is done, the bylaw chairperson sits down, and the chair asks for discussion on Article I and explain the changes and the reason for them. Members can ask questions, discuss the article, and propose amendments. If any changes are proposed, the chair takes a vote on the amendment. If the amendment is adopted, it becomes part of the revision. When the members are finished with Article I, the chair asks the bylaw chairman to read Article II and explain the changes and the reason for them. The bylaw chairman sits down, and the chair asks the membership for discussion. Again, the members can discuss, ask questions, or propose amendments. This same procedure continues for each article of the proposed revision.

After the members finish discussing the last article, the chair opens the amended revision for more discussion, debate, and amendments. When the members finish discussing and proposing amendments, the chair takes a vote on the revision as amended. This requires a two-thirds vote, which should be counted. Members can take the vote by ballot or take a rising counted vote. The secretary records the number of votes in the minutes. If the revision is adopted, it immediately replaces the bylaws. If it is defeated, the current bylaws remain as they are.

Sometimes members attach *provisos* (which state when a certain bylaw goes into effect) on certain provisions or on the entire revision. For example, if there is a change in the term of office that would affect current officers, the members can attach a proviso that says that this

part of the document will become effective on a specific later date. (*You can read more in Robert's Rules if you need more information about proviso*).

After bylaws are revised, a revision date should be stated at the end. When bylaws are amended, either a footnote after each amendment states the date or the amendments are noted at the end of the bylaws. Having this information at the end of the bylaws allows members to crosscheck the changes with the minutes to be sure the changes were made correctly.

Amending the Bylaws

When one change or a few changes to the bylaws are necessary, members can present these as individual amendments. Members should follow the procedure outlined in the bylaws for making amendments. Usually this requires giving the membership previous notice that a vote will be taken on an amendment, and it often requires submitting the amendment to the board or through a bylaws committee. If the amendment does not have to be submitted through a committee or board, any member can make the motion. If no written notice is necessary, members can give notice orally at the previous meeting. The amendment then becomes a general order of business at the meeting for which it is proposed.

When giving notice that an amendment will be proposed, word the notice formally. For example, the notice can say, "To Amend Article III. Members, Section 2. Dues, by striking out \$25.00 and inserting \$50.00." If the notice requires mailing, state the original bylaw, the proposed amendment, and finally how the bylaw would read if the amendment were adopted. Many times, organizations also include a reason for the proposed change.

Giving notice informs the membership that there is a limit to the proposed change. This is called the *scope of the notice*. It means that members cannot amend a bylaw beyond the scope of the notice, which protects the rights of the absent members. So at the meeting, members cannot propose a change below \$25.00 or above \$50.00, but they can propose a change between \$25.00 and \$50.00.

When a bylaw amendment appears on the agenda under general orders, a member must propose it as a formal motion, it must be seconded, and it is debatable. Members can also amend it within the scope of the notice. A majority vote adopts these amendments. For example, say an amendment was proposed to strike out \$50.00 and insert \$40.00, and it's adopted. Now the proposed amendment to the bylaws is to increase dues from \$25.00 to \$40.00. This is now presented to the assembly as the bylaw amendment, and it takes two-thirds counted vote to adopt. The bylaw provision takes effect immediately if it is adopted, unless members vote that it takes affect later, which requires a proviso.

Sometimes there may be several bylaw amendments proposed taking different approaches to amend the same bylaw. In this case the parliamentary rules that states, "when a main motion is adopted, another main motion concerning the same subject is not in order," is not applicable to amending bylaws. Every bylaw presented should be considered. Since a bylaw that is adopted is immediately in effect, the further amendments proposed are in essence amending something new. If several bylaws are proposed on the same subject, the chair should arrange them in order from the least comprehensive change taken first to the greatest change taken up last. If the bylaw language is so changed during this process that a proposed amendment no longer applies to the bylaws, the amendment should be dropped.

(for Helpful motions for bylaw revision and amendment, see Robert's Rules pages 317-323).

Appendix B: Board Governance and Nonprofit Management Consultants

Diane Lang

Principal Consultant

Lang Leadership

Phone: (541) 510-1038

Email: dianelang@comcast.net

Diane Lang works with nonprofits and Boards of Directors helping them become more effective and efficient in their Board Governance and overall organizational health. For more than 15 years she was the Executive Director of HIV Alliance, a nonprofit social and health service agency in Eugene, OR. While there she managed a \$2M budget, 40+ employees and a 17-member Board of Directors. In addition to providing consulting services, she currently teaches graduate courses for the Nonprofit Management program in the School of Planning, Public Policy and Management at the University of Oregon. Diane earned a law degree from University of Virginia Law School and an undergraduate degree from Gettysburg College.

Sarai Johnson

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Sarai Johnson is a coach, author and speaker. She has nearly two decades of experience managing businesses, nonprofits, people, projects, and as a creative entrepreneur. She earned her Master of Public Administration and a Graduate Certificate in Nonprofit Management from the University of Oregon, and certifications in Cognitive Behavioral Therapy, Book Yourself Solid® Coaching, 200 RYT Yoga Alliance, and project management, among others, and is an Emerge Oregon alumna.

Third Sector Capital Partners

Tim Pennell

tim@thirdsectorcap.org

Third Sector Capital Partners, a 501(c)3 nonprofit advisory firm, has a seven-year track record of collaborating deeply with communities to re-write how they contract for social services, re-aligning vast amounts of public resources to move the needle on social problems. They have helped launch ten outcomes-oriented contracts that transition over \$360 million in total public funding towards positive outcomes. The Third Sector team brings extensive experience managing projects with diverse groups of stakeholders, economic modeling, fundraising, impact investing, evaluation, and data analysis. They came to the attention of the consultancy team after a consulting session with the United Way of Lane County's Board of Directors of which Susan Ordonez is a member.

Appendix C: Ford Family Foundation Grant

Overview

Technical Assistance Grants: OPEN

Technical Assistance Grants help organizations build their internal capacity to make a positive impact. They can be used to develop additional leadership expertise, engage in strategic planning, or hire an outside expert with specialized expertise. Grant funds cannot be used to compensate staff or board members to conduct the work of a consultant. If your project does not fit this category, check out our other [Current Funding Opportunities](#).

Typical Grant Size: Up to \$5,000

Length: Single year

Examples

For information purposes only (similar projects are not guaranteed funding):

- Hire a consultant to assist your organization in developing a strategic plan
- Hire a trainer to train board and staff on effective fundraising strategies
- Pay for staff members to attend a training or conference that builds their skills and capacity
- Hire an outside accountant to help build financial systems to make your organization eligible for governmental grants

Technical Assistance Grant Requests Need to:

- Meet the Foundation's eligibility and readiness requirements
- Serve communities in rural Oregon or Siskiyou County, Calif., with less than 35,000 in population not adjacent to or part of an urban or metropolitan area
- The recipient organization's mission must align with one of the following Foundation program areas:
 - Children, Youth and Families
 - Postsecondary Success
 - Ford Institute for Community Building
 - Community Economic Development
- Provide the following:
 - Amount being requested (up to \$5,000)
 - The type of capacity-building activity planned. Options are:
 - Hire an external consultant / trainer / expert
 - Send employees or board members to an outside event, training or conference
 - Other
 - The name of the consultant / trainer / outside expert to be hired, or the outside event / training / conference to be attended
 - A description of the organizational capacity to be attained through the activity
 - A list of the financial or in-kind contributions your organization has made (or will make) to support this activity. There is no specific match requirement, but you need to include evidence that your organization is invested in this activity.

Questions? Contact Grants Management (grantsmanagement@tfff.org) or call (541) 957-5574.

What to Expect:

Typically, funding for a Technical Assistance Grant is decided within four weeks of the application being received.

Appendix D: Possible Business Partnerships

No	Name	Details
1	A.R.K. Miniature Enterprises	Location: 51470 US HWY 97 Suite 2, La Pine, OR 97739 Address: P. O. Box 742, La Pine, OR 97739 Phone: 541-536-0928 Mobile: 541-280-7206 Web: http://www.arkminiatures.com E-mail: Rkindell1@hotmail.com
2	AAA Home Inspection, LLC	Location: 53004 Tarry Lane, La Pine, OR 97739 Phone: (541) 504-0799 Web: http://www.aaahomeinspection.org E-mail: aaahi@bendbroadband.com
3	Accord Property Management	Description: Complete property management services Location: 51515 Huntington Road Address: PO Box 3434, La Pine, OR 97739 Phone: 541-647-0356 Web: http://www.apexlapine.com/property_management E-mail: duecear@aol.com
4	Ace Hardware/ La Pine Building Supply	ACE Hardware Location: 51615 Huntington Road La Pine OR 97739 Address: P.O. Box 439 La Pine OR 97739 Phone: (541) 536-2161 Fax: (541) 536-3143
5	Air Tech HVAC/R Inc	Location: 52322 Glenwood Ave. Address: P. O. Box 1572 La Pine OR 97739 Phone: (541) 536-2463 Fax: (541) 536-0845 Web: http://www.airtechvac.com/ E-mail: pamc@airtechvac.com
6	American Legion Post 45	Location: 32532 Drafter Rd, La Pine, OR 97739 Address: PO Box 590, La Pine, OR 97739 Phone: 541-536-1402 Fax: 541-536-1692 E-mail: alpost45@bendnet.com
7	Ameriprise Financial	Location: 35 NW Hawthorne Ave, Bend, OR, 97701 Address: PO Box 1108, La Pine, OR 97739 Phone: 541-639-1430 Web: http://www.AmeripriseAdvisors.com/Linwood.o.Jarrell

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