

## **Evolving Principles for State Affiliation Agreements As They Might Apply to FliCRA**

1. NaCCRA seeks to advance the quality of life for older Americans and to promote and improve congregate living and continuing care.
2. Any individual who supports NaCCRA's mission may become a NaCCRA member upon application and payment of such dues as the Board determines.

**Remark.** *This principle has not yet been adopted by the NaCCRA Board and the current Bylaws are more restrictive but there is a growing consensus within NaCCRA's governing circles that a more broadly based organization will have more political clout in determining public policy and more influence with providers.*

3. NaCCRA is committed to working in partnership with other organizations that support its mission.

**Remark.** *Our emerging liaison with LeadingAge is only a first step. We might also seek similar partnerships with other organizations including Argentum (formerly the Assisted Living Federation of America); the American Senior Housing Association; Brookdale; and others. The relationship with FliCRA is a similar partnership though in a different dimension.*

4. The loyalty and focus of NaCCRA Board members and Officers, while acting in those capacities, is to the national organization before, and above, any loyalty to the state or community organization with which they may also be

affiliated. Though less binding, the loyalty of NaCCRA Committee members should likewise be to the welfare of the whole and not favor local interests to the detriment of the national organization.

## **Premises**

1. For NaCCRA to thrive and to gain political influence it must be a numerically strong organization, nationwide, of individual members committed to ameliorating the challenges of aging.
2. It is unreasonable to ask people to write two checks for memberships in separate organizations, one at the state level, and one for national matters; joint memberships are needed.
3. Unfortunately, past arrangements with flat dues for state and community organizations have led to the false impression that such payments conveyed individual membership privileges. Such flat dues arrangements should be phased out though state and community organizations are encouraged to continue to contribute collectively toward NaCCRA's mission.
4. The broadest range of NaCCRA services, and the greatest value from NaCCRA affiliation, will be available to those state and community organizations that operate as intrinsic chapters within NaCCRA with reduced commitment and benefits for those more loosely connected to NaCCRA depending on the degree of affiliation and coordination relative to independent, uncoordinated activities.

## Principles

1. Whether membership collection and administration is by the national organization, or is at the state level and handled centrally by a national administration within NaCCRA, the amount per member per year for central operations should be uniform for all states for equal services. Allowances can be made for states that use fewer or more central services.

**FliCRA Impact.** *FliCRA will be the primary beneficiary of this principle since FliCRA already uses the services of Bennett Napier's Partners in Association Management organization. The scaled revenue sharing in the Draft FliCRA Agreement is reflective of how this might work in practice.*

2. Flat dues for state and community organizations can be phased out by allowing states and communities to use their collective dues to provide memberships for designated individuals until such time as there are sufficient members from that state or community to make the flat dues no longer necessary. Collective memberships are best phased out as we move toward an organization(s) of individuals.

**FliCRA Impact.** *FliCRA has a large number of community chapters that also pay community dues to NaCCRA. This principle will allow those flat dues to be phased out gradually as the community chapters each decide on their own how they want to handle the transition. The result will be that state and community influence within NaCCRA will be governed by the number of NaCCRA members each contributes rather than by the artificiality of a nominal flat dues payment.*

## Practicalities

1. NaCCRA can provide administrative support for State organizations avoiding the duplicative cost (or volunteer effort) of dues collection; membership tracking; membership administration; fielding member inquiries; compliance with state and federal requirements, etc.
2. NaCCRA can collect dues either in NaCCRA's name, or if preferred for local membership development efforts, in the name of the state affiliate. Collected dues are then distributed according to agreement.

**FliCRA Impact.** *Even when, and if, FliCRA adopts this new form of relationship, it is most likely that FliCRA will continue to collect dues in its name and will maintain its presence as the residents' representative in the State of Florida with that presence enhanced by its association with a more effective national organization.*

3. In a quest for better value, extensive use can be made of electronic dissemination of information, including explicitly NaCCRA's existing LifeLine newsletter. A paid subscription option, in addition to dues, can be offered to those members who still prefer to receive a personal, mailed, printed copy of the newsletter. Some communities may elect to print the newsletter locally for distribution through in-house mail boxes.

**FliCRA Impact.** *FliCRA already has an extensive and effective communications program including both a newsletter and periodic updates by Bennett*

*Napier on legislative developments. NaCCRA will work with FliCRA to support FliCRA's communications and to avoid the duplication that now exists for those FliCRA members who are also NaCCRA individual members.*

## **Approaches**

1. Centralized administration by NaCCRA with state and community chapters as an intrinsic part of NaCCRA with some states and communities continuing to have their own 501(c)(4) or 501(c)(3) organization during a transition period and, thereafter, for certain needs.

**FliCRA Impact.** *FliCRA is now a 501(c)(4) organization and has considered whether there would be benefits in converting to 501(c)(3) status or forming an affiliated 501(c)(3) organization. Either approach would bring with it new compliance issues and regulatory requirements. An agreement with NaCCRA can give FliCRA the benefits that are sought without the burdens of compliance etc.*

2. Decentralized, independent state organizations, with NaCCRA confined to those matters that the state organizations authorize and agree to fund.

**FliCRA Considerations.** *This is the approach that has been followed up to now. It has kept NaCCRA weak, and while individual NaCCRA members were able to achieve revocation of the imputed interest income tax and the enactment of the Right to Return Home Act, NaCCRA has not accomplished all that it might otherwise have achieved and CCRC residents have not had the benefits that a stronger NaCCRA could give them.*

3. Centralized NaCCRA in affiliation with independent state organizations which then have an “Inclusion Option,” which they can exercise when they are ready, to become more closely affiliated with NaCCRA.

**FliCRA Impact.** *This is the opportunity that is now presented for FliCRA to consider.*

4. Care must be taken to preserve NaCCRA’s integrity as an organization and to avoid any semblance of money laundering. This is not a concern for those state and community organizations that operate as NaCCRA chapters under the NaCCRA corporate umbrella. Independent organizations, though, may wish to evolve to be able to better benefit from the NaCCRA affiliation, including progressively closer affiliation and coordination between and among the NaCCRA affiliated network.

## Questions

**FliCRA Consideration.** *The questions that follow remain open within NaCCRA and they are also questions that FliCRA can productively consider so that FliCRA’s views are adequately represented in the Charlie Paulk Committee and by the NaCCRA Board.*

1. Should NaCCRA be a centralized national umbrella for resident advocacy or should the state organizations dominate with NaCCRA an adjunct to the states?
2. Should NaCCRA-facilitated administrative services, i.e. services under NaCCRA’s contract with Partners in Association Management, be available

to state and community organizations that are not affiliated with NaCCRA for joint dues collection?

3. Should the funding for NaCCRA be flat rate from the states, with small states paying the same as large states, or should it be per member per year or per member per month?
4. Should state organizations be allowed to benefit from tax deductible donations made to NaCCRA, recognizing its 501(c)(3) status, or should each state stand on its own for dues supplementation or sponsorships?
5. What constraints, if any, should apply to state's use of NaCCRA generated funding in light of NaCCRA's 501(c)(3) status?