
Front Desk in a Box

Guidelines for
Creating and
Developing a
Village
Concierge

Front Desk Florence

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Introduction

Front Desk Florence began as a desire. The desire became a conversation between two friends.

That desire was to find a way for themselves and others to remain in their homes, in Florence, as long as possible.

Florence is a very nice place to live. Our friends are here; we own comfortable homes; having to move to a Continuing Care Retirement Community can be very expensive. Other options for assisted living in old age are often not very attractive.

Shortly, three other friends were brought into the conversation. An idea emerged. Wouldn't it be great if one phone call could get us whatever help we needed? We could stay here, living independently, living well in Florence. This sounded great but how can we do that? A larger circle of friends was invited to hear about the idea. Their positive response encouraged the "committee" to forge ahead and explore how the idea might be developed.

At that point, based on an Internet search, we discovered we were not alone. Our desire and idea were not unique. Beacon Hill Village, Boston, was created by local residents who shared the desire to "age in place." Other "villages" were beginning to spring up, using Beacon Hill as a model. Most of these villages were in densely populated metropolitan areas. Our challenge was to figure out how to execute the "village" concept in a rural setting (low population density) and in an existing community that already considered itself a village.

The Villages Concept

The model upon which Front Desk Florence (FDF) is based started in Boston in 2002 with the launching of Beacon Hill Village. Since that time, the Villages movement has spread around the country, and there are now close to 50 similar organizations in 20 different states and the District of Columbia.

The primary purpose of the Villages is to serve the needs of seniors and to promote the “aging in place” concept. Indeed, many of the names describe that primary function, such as:

- Secure@home
- Transition in Place Service
- Staying Put

Front Desk Florence is different from other Villages in one important respect: it is an operating Village-style organization that serves a rural area. (An earlier effort serving an entire rural county did not succeed, and another has recently been formed in a rural neighborhood.) All the other Villages are in urban or suburban locations, with large potential subscriber bases. FDF is also distinctive because it has expanded its member base to serve market segments other than seniors. Part of the rationale behind this expansion was dictated by economics—the subscriber base in a rural market of 25,000 (approximately 9,000 within the city limits) does not produce the funds sufficient to support a seniors-only focus.

So while FDF utilizes and supports the Villages model, its aim is to adapt the original Villages idea and modify it so it will work in small towns and rural areas.

The Concierge Concept

Thoughts about implementing a “One Call” policy triggered concern about how it could be managed. How would we handle calls and not drop the baton? Internet searches lead to Call Centers; to a self-study guide for concierge managers; to Customer Relationship Management (CRM) software; finally to Concierge Colorado, a consulting firm with experience in hospital concierge services and developers of CRM software. The concierge business model, prompt response to a clients’ requests, provides both the philosophy and operational style for Front Desk. We can say with confidence and testimonials, “Call Front Desk...and it will happen. Promptly.”

The “I’m Not Ready” Challenge

No one likes to think of themselves as “old.” After all, old is just ten years past where you are right now! So a major challenge in communicating the Front Desk concept is in framing the conversation so that potential members do not feel as though they are giving up or giving in.

The first part of the communication strategy, which will be discussed in more detail later in this manual, is to use word-of-mouth marketing to create interest and understanding. If Joe joins Front Desk and tells his neighbor Sam how great the services are, Sam is more likely to view the idea favorably. The strategy is to use early responders to spread the word.

The second strategy is to expand services to appeal to companies, groups, and individuals other than just seniors. Front Desk accomplished this by adding shopping and merchant discount programs to its service line.

Getting Started

Establishing a Front Desk in your town begins, like FDF, with a conversation. You need a core group of interested, committed people who are willing to serve as an organizing committee. Ideally, these people would be from a variety of backgrounds and interest groups. It wouldn’t work well, for example, to begin with a group from one church congregation or civic group, since the organization might then be identified primarily with members of that group.

The FDF Organization Model

The original Front Desk organizing group included a minister, a physician, a nurse (all retired) the mayor, a higher education finance analyst, a CPA, a psychologist, a social worker, and two or three representatives from local businesses. The support of the business community is one of the keys to success. Strategic partnerships are an important piece of this support.

Developing strategic partnerships

Identify key businesses in your community for potential strategic partnerships. This may or may not include board membership. The benefit to a business that becomes involved is enhancement of its image as a good corporate citizen. Ideal partners would include a hospital or clinic, college or university, as well as other large employers in the vicinity.

Identify opinion leaders

Get involved with organizations where opinion leaders hang out. In each community, there are organizations that are recognized as playing a leadership role. In your town, it may be the Chamber of Commerce, Rotary, Kiwanis, the Board of Realtors, or some other trade or civic group. There may be more than one. Request an informal meeting with their officers or leaders. Ask for their opinions and suggestions. From these meetings, you may be able to determine if any of their members would be willing to join your organizing group, or serve on your board in the future. When you have completed your organizing phase, ask for an opportunity to speak to members of these groups.

Once you have your core organizing group, schedule regular meetings; once a week would be ideal. Work your way through this manual, and decide how best to adapt the principles to your particular location and situation. Form sub-groups or committees as needed.

At each organizing meeting, create a task list to track what needs to be completed before the next meeting. See example in Exhibit A. (Note: the list provided is a small sample of organizing tasks—add or subtract your own items as needed.)

Organizing your board

Most or all of your board will likely come from your organizing committee. It's important that your board be enthusiastic and committed, that they know the community. Here are some qualifications for board membership:

- Be residents of the community or immediate surrounding area

- Have non-profit and/or professional expertise (For example, attorney, CPA, real estate professional, hospital administrator)
- Represent different age groups, genders, ethnicities that reflect the overall community profile
- Be willing to experiment and learn

Raising Seed Money

At least some members of your organizing committee must be prepared to either contribute or raise funds—or both. They should be willing to consider joining the organization as charter members. While cash is necessary to fund the ongoing operation, in-kind contributions can work as well. For example, office space might be donated by a local commercial enterprise.

Staffing

Initial staffing may be done by volunteers, until a membership base is established and financial projections and budgets can be developed. Because much of the work consists of answering phone calls and making referrals, trained volunteers could conceivably work from home via call forwarding from an office number, or by using a dedicated cell phone.

As the organization grows, it may be a goal to have a paid staff person and office hours at least half time (20 hours per week). This kind of schedule will be especially important if part of the services provided include shopping and delivery.

Even if you have a paid staff member, volunteers are still the key to a successful operation. Ask your members to sign up for specific tasks or time periods. This will help alleviate burnout of key players, and will benefit your members by helping them feel more involved and committed to the organization.

Research and Demographics

You will need to conduct some preliminary research to determine the demographics of your town. This information may be available from any or all of the following sources:

- Chamber of Commerce
- City, County or State Government
- Real estate brokers and title companies
- Large employers in the area

When the 2010 census is complete, it will be a source of reliable information, but until that time, census information is probably outdated and inaccurate.

It's important to keep in mind that information obtained from your county government may not be applicable to your particular location. For example, Lane County, where Florence is located, shows a very different overall demographic from Florence itself. So unless your county's data are segmented into specific areas, you may not find it particularly useful.

Conducting a pre-launch survey or needs assessment in a small market is not recommended, as surveying is labor-intensive and not cost effective. Informational group meetings are useful for gathering opinions, creating a buzz, and getting the word out. However, remember that you are selling to individuals, not groups.

Once you have been in business for six-twelve months, a member survey is highly recommended. This survey will be discussed in the Two Years Later section, and a sample survey will be provided.

The Model: Service, Price, Place, Promotion

Service

FDF is a concierge service. It connects its subscribers to vetted service providers. It does not itself provide any of the services.

Front Desk's initial services were house care and personal care. During the first year, a shopping program was added, in order to build membership among different interest and age groups. The home care and personal care services are combined for membership fee purposes under the One-Call label. Front Desk acts as a call center, available to members 24/7, to manage these functions.

FDF was fortunate to establish strategic relationships with two partners: a general contractor already providing house care services to the community; and a company providing professional in-home care providers, from trained caregivers to the most skilled nursing care. FDF has standing agreements with these service providers to respond to member needs in one hour or less. Here is a brief description of each service area.

House care covers anything related to the member's home maintenance needs. This includes such things as plumbing, electrical, painting, roof repair, house cleaning, window washing, handyman, yard work, and related services. There is a special category for part time residents (snowbirds and rainbirds) which provides monthly home checkup service. All these activities are coordinated by one general contractor, who was interviewed and screened by the board. All his subcontractors are licensed, insured, and bonded.

The contractor is required to respond to requests for service within an hour of Front Desk's first call, to scope the problems and set appointments for further investigation or work. Vendor response time for emergencies such as frozen water pipe breaks, jammed garage door, ruptured sink disposal - 15 to 20 minutes. Really. Our members are amazed. Immediate contact and rapid emergency response is becoming a brand signature.

Payment for services is negotiated in advance. It is the responsibility of the member, stated in a signed agreement when joining, to pay promptly as agreed with the vendor. As a result, Front Desk requests are usually given top priority. Front Desk expects, and receives, 110% service rather than discounts from its vendors.

Personal care provides short or long-term in-home care for members who are ill, disabled, or otherwise unable to manage all the functions of daily life. Front Desk utilizes an agency which provides caregivers at all levels of expertise, from housekeepers to registered nurses. All workers are bonded, and are screened by Internet background check daily in order to assure reliability.

Shopping. Front Desk offers a weekly shopping service in order to serve people who don't want to or cannot drive an hour or more to the nearest Costco warehouse. Members gain six to eight hours of time and save a tank of gas by using this service. Costco's product catalog is available on the Front Desk web site. Orders can be placed on line or by fax and are delivered to the Front Desk office every Friday morning. If a member is unable to drive, Front Desk will deliver the order to their home.

The shopping service was expanded to provide an extensive discount program by more than two dozen local merchants, including everything from automotive repair to restaurants. Each participating merchant receives a small poster in a Plexiglas frame that designates them as a Front Desk participating merchant. Front Desk business cards are provided in a holder attached to the frame. This helps to build awareness, both for Front Desk and for the merchant. (See sample in Exhibit B.)

Information. Calls for information other than for service referrals are handled as a public service. The caller is invited to leave a name and address to receive information about Front Desk.

Price structure for memberships

A variety of membership types and levels were developed in order to serve different segments of the market. The membership fees for each are listed below.

- Shopping: includes weekly Costco ordering, organic foods ordering, and local merchant discounts. Membership fee is \$13 per month, or 13 months for \$156.

- One Call: includes both home care and personal care service referrals for \$13 per month or \$156 for 13 months. The shopping and One Call memberships can be combined for a monthly fee of \$26, or 13 months for \$312.
- New Neighbor: this membership is basically the same fee structure as Shopping and One Call, but is marketed through local real estate brokers. A three month membership is offered for \$39; and six months for \$78, which includes a dinner for two at a local restaurant.
- A group membership plan is being developed and will be offered through local churches and businesses. The organization is the subscriber, not the individual members. When membership, the members of the group have access to the Call Center and Shopping Center, but do not participate in the Merchant Discount Program or the special Conversations and social events for individual members. An individual in a group may elect to subscribe personally, however, if he or she wants to receive those benefits.
- Travelers: snowbirds and rainbirds can purchase three or six month memberships, which includes monthly house check and necessary repairs or maintenance inside and out for \$50 per month.

Place: Keep it Simple

Smaller communities can begin operations with little more than a phone and a web site. A local phone number is the first step, and a toll-free number is recommended, since inquiries from people moving into the community could come from anywhere in the country. Since initial staffing will probably be done by volunteers, calls can be handled by call forwarding to a trained volunteer's home or cell phone. Alternatively, the main phone number could be a cell phone, which could be used by anyone, anywhere.

Unless and until a physical office is established, board and committee meetings could be held in a variety of public places, such as a community center, senior center, or public library meeting room.

Having a physical location gives the organization more focus and visibility. Getting office space donated by a corporate sponsor would be ideal, particularly if such space could include street frontage and signage, as well as parking. Front Desk was able to obtain office space with main highway frontage and signage from a local bank that was moving one of its departments to a new building.

In small communities, especially during the first year of operation, it is perfectly possible to run the organization with nothing but a cell phone. This would definitely be true for the house care and personal care services. If the shopping service is offered, it will be necessary to provide a place to store perishables until they are picked up. However, this could be done in a member's home until a permanent office is established.

One of the prominent and important features of any program that involves seniors is to develop activities designed to keep home-based seniors connected, informed, and inspired. Loneliness and isolation are among the greatest risks of "aging in place." Fortunately, the Florence community already has a very active senior community life, including volunteer opportunities; cultural, social, and artistic events; community college courses; and social and group study outings. Other communities should evaluate their own senior activities to determine if more or different programs may be desirable. FDF has initiated periodic "Conversations" with various subject matter experts on such topics as mental health, in-home health care, home and personal safety, and performing arts.

Promotion: Building the Brand

The key to marketing an organization like Front Desk is to get people talking about it. News stories, ads, commercials, web sites, direct mail—these are all great tools to reinforce your message. But word-of-mouth marketing is what will build memberships. Or to quote Will Rogers, "Get someone else to blow your horn, and the sound will carry twice as far." Selling the Front Desk concept is basically a one-to-one proposition, particularly since the concept is not easily understood and needs to be explained. How do you build the buzz?

Utilize small groups

Start by holding small group meetings. Develop a Power Point presentation outlining the key benefits of your organization's service. Then develop a plan to get in front of clubs, neighborhood associations, and other community groups. If you have board members or other members who belong to such organizations, use them as contacts, hosts, and/or presenters. Churches are one example of a major small group opportunity.

Whenever you meet with a group, ask for immediate action. Don't say "Give us a call if you're interested." Offer something special if people sign up on the spot. One month free, dinner at a local restaurant, drawing for a special gift—anything that will demand action.

When you have begun to build your membership base, it's time to put word-of-mouth marketing into action. Call your members. Ask them how you're doing. Listen. If there are any issues or problems, resolve them at once. Then ask if the member would be willing to recommend you to their friends. You can do this one-on-one. Or members might host a coffee in their neighborhood or bring friends to an open house or coffee at your location.

Media

Newspaper. Plan a series of stories around key milestones of the organization's growth. Start by announcing the formation of the organization, services offered, and board members. Announce new services as they are added. Recognize key milestones. (See Exhibit C for sample news stories.)

Radio/TV. If you have a local radio and/or TV station with live programming, set up an interview with the president or chief operating officer. After the organization has been in business for six months or more, plan a series of brief interviews or commercials with

satisfied members. This builds on the word-of-mouth concept, since is it equivalent to a neighbor telling a neighbor. You can also do commercials using member testimonials.

Electronic. You MUST have a web site and it must be a good one. To view Front Desk's web site, go to www.frontdeskflorence.org. Note that the left navigation bar is an easy-to-follow index. When you set up your site, be sure that each link on the navigation bar has a completed page, so that when a visitor clicks on the link, the information is there. Don't put up "under construction" or "check back later" notices, as that will discourage return visitors.

There are any number of low cost do-it-yourself web site builders you can use. Front Desk uses Club Wizard. Intuit offers a low-cost (\$4.99 per month) service. Yahoo has a very comprehensive, easy package, and there are many others. Entire books have been written about internet marketing, including *Internet Marketing for Dummies*. Get a good manual and use it.

When your web site is up and running, make sure you are linked to sites that people would normally visit when looking for information about your town. This would include the Chamber of Commerce, Visitor's Bureau, and real estate companies.

For members who are electronically savvy, email blasts are the quickest way to communicate with members and prospective members. Make sure your emails include an opt-out provision, so people can unsubscribe if they wish to. Use emails to announce new services, special events, or organization milestones. Consider creating a blog, if your website traffic warrants it. You will need to have someone who can write it regularly (at least once a week) and write it well. A boring or outdated blog is worse than none at all. So be prepared before you start.

Direct Mail. Most, if not all, of your printed material can be created with MS Publisher or a similar program. If you have a volunteer who knows how to use these programs, that's great. If not, you can still create simple brochures using MS Word or another word processing program. Use professional-quality photos, which can be obtained online at a reasonable cost. Front Desk uses www.fotolia.com. Create a general brochure that describes all your services, and add special brochures for specific service categories.

Front Desk has a shopping brochure, for example. There is also a flyer aimed at people relocating to the area, which is distributed through local realtors and the Chamber of Commerce.

Targeted direct mailings can be done using property owner information obtained from a the country or state through a local title company. The information obtained in this way is part of an open record, and does not violate any privacy rules. Sample direct mail letters and brochures can be seen in Exhibit D.

Brochures created for direct mail use can, of course, be used in other ways such as trade shows, community meetings, and anyplace in the community where informational literature is on display.

Fundraising

Most “Village” organizations are set up as charitable non-profits (501(c) 3. Front Desk is an Oregon mutual benefit non-profit. However, just because you’re a non-profit doesn’t mean you can exist without money! Here’s how to get what you need.

Board Members and Community Supporters. Your organizational group should be made up of people who are committed to the concept and willing to provide some seed money to get started. While the seed money is being collected, come up with your first-year budget (see template in Exhibit E). This will help you establish your membership fee structure and determine your membership goals. Continue to monitor and revise your budget on a monthly basis, especially during the first year of operation.

Grants. There are grants available for charitable “Village” type organizations. These may come from either government agencies or private foundations. Grant writing is a function that demands considerable expertise, so find someone on your board or in your community who can assist you in writing successful grant proposals. Study the grantor(s) carefully to be sure your organization’s needs and goals are aligned with theirs. Also be aware that most grant money is awarded for specific projects, not for

day-to-day operating expense. You must look like a successful organization, not one that is struggling to keep its doors open.

Membership. Make your membership structure simple and price-conscious. Quote your membership fee by the month (\$13 per month) rather than an annual fee (\$156 per year). By comparison, the annual fee may sound intimidating and expensive. If the member chooses to pay by the month, offer automated billing to a credit card. If they pay the annual fee by check or credit card, offer the 13th month free.

Once a member has signed up, stay in communication. If they are not using services, find out why. Renewals will become your lifeblood as the organization grows.

Know your breakeven point. How many members do you need to keep the doors open? If you are going to start a new service or program, what are the costs? How many new members will you need to finance it? Work with your board to set program and membership goals quarterly.

Front Desk: Two Years Later

Member Survey. You should conduct periodic organizational reviews to see where you are and where you want to go. Around 12-18 months after startup, conduct a member satisfaction survey. Find out:

- What services people are using (or not using)
- What people like about the organization
- What they don't like
- Level of satisfaction with various services

A sample of Front Desk's survey can be seen in Exhibit F. This survey was conducted by phone, using a volunteer with some experience in surveys and research. However, anyone with a good telephone manner can easily obtain the required information. Note that the member satisfaction information is obtained first. Demographic information is

taken at the end, and participants are told that they are free not to answer any or all of those questions if they are not comfortable.

Use the survey to accomplish two additional things:

- Obtain updated email and mailing information
- Ask for referrals and/or testimonials

Tabulate the information for your board, and communicate the results to your members.. If the results are favorable, you can use the information as the basis for a news release to the local paper as well.

It's non-profit, but it's not a charity. Even though you are a non-profit organization, you must be self-sustaining. Make sure your members are receiving value and that both your members and your board remain committed to your mission. This will assure you of two things:

- Membership renewals
- Word of mouth marketing to attract new members

The whole concept of the “aging in place” nationwide movement is about people living well. You can serve your community by providing the framework and resources to enable seniors and others to do just that. So while many potential members may begin with the “I’m not ready” response (aka “I’m not old”), you can, through consistent communication, shift that to “I AM Ready.” That is, I am ready to take charge of my life. I am ready to utilize available resources to make my life easier and more fun. I am ready to live my life to the fullest.

In reality, Front Desk is just beginning. For those who want to create similar organizations in their own communities, this manual can serve as a starting point. Like our organization, yours will change and grow. Always think of it as a work in progress.

For further information, contact:

Managing Director

Front Desk Florence

P.O. Box 2738

Florence, OR 97439

541.902.5122

Email frontdesk@oregonfast.net

www.frontdeskflorence.org