Frontline Marketing, Management and Economics Journal
ISSN: 2752-700X

Marketing Infrastructure for Nonprofit Senior Living Organizations

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ARTICLE INFO

Article history:
Submission Date: 17 May 2026
Accepted Date: 18 June 2026
Published Date: 15 July 2026
VOLUME: Vol.06 Issue07
Page No. 53-63
DOI: -
https://doi.org/10.37547/marketing-fmmej-06-07-06

ABSTRACT

Nonprofit senior living organizations communicate with prospective residents, families, current residents, staff, referral partners, donors, and regulators while operating under mission, accessibility, and data-governance constraints. This article develops an evidence-informed marketing infrastructure for that setting. An integrative conceptual review was conducted on 13 July 2026. The review examined 36 scholarly records with confirmed Crossref metadata and three public institutional documents. Selection focused on nonprofit stakeholder engagement, relationship marketing, market orientation, digital transformation, artificial intelligence in marketing, privacy, technology access in later life, and governance. The synthesis yields a four-part framework: mission and stakeholder needs, consent-aware data, human-reviewed communication, and mission-linked measurement. Governance and risk review operate across all four parts. The article further specifies a traceability path from stakeholder signal to evidence record, accountable decision, and learning measure. This path distinguishes enabling communication outcomes from service and mission outcomes, preventing unsupported causal claims. The framework treats marketing as an organizational capability for listening, coordination, and accountable communication. Generative tools may assist with drafting, classification, and retrieval when a responsible staff member validates facts, audience fit, accessibility, and approval status. They should not determine eligibility, clinical matters, housing placement, or other high-stakes decisions. The article contributes a bounded planning model and a set of testable propositions for future research on adoption, trust, accessibility, staff workload, and mission-related outcomes.

Keywords: Artificial intelligence, data governance, digital transformation, nonprofit marketing, relationship marketing, senior living, stakeholder engagement, strategic communication, value co-creation.

INTRODUCTION

Senior living organizations work with decisions that are personal, consequential, and frequently made by more than one person. A prospective

resident may seek information directly, while adult children, clinicians, discharge planners, community partners, and current residents shape the information environment. The communication task therefore extends beyond lead generation. It includes making services understandable, listening to concerns, maintaining trust, and providing routes for people who prefer paper, telephone, or in-person contact. The Administration for Community Living (2024) documents the continuing growth and diversity of the older population in the United States, reinforcing the need for communication practices that account for different capacities, preferences, and access conditions.

Relationship marketing research in the voluntary sector identifies trust and commitment as material to donor behavior (Sargeant & Lee, 2004). Work on nonprofit communication treats disclosure and dialogic mechanisms as components of online accountability (Saxton & Guo, 2011). Recent research on organizational listening adds an operational perspective: engagement depends on whether organizations solicit, consider, and incorporate stakeholder input, as well as on whether they have the capacity to do so (Fu et al., 2024). These insights apply to nonprofit providers in this field because marketing claims, service information, and family communications can affect perceptions of credibility and care.

Digital transformation changes the channels through which these relationships are managed. It concerns coordinated changes in value creation, organizational structures, processes, capabilities, and culture rather than the isolated adoption of a new platform (Vial, 2019; Verhoef et al., 2021). In a nonprofit setting, a customer relationship management system, website, intake process, email platform, and staff response protocol can either create a coherent experience or fragment information across departments. The relevant managerial question is how these elements serve the mission and the people who depend on the organization.

Artificial intelligence expands this question. Marketing scholarship describes possible uses in data analysis, interaction, content production, and organizational capabilities (Davenport et al., 2020; Huang & Rust, 2021; Mikalef et al., 2021). Recent studies of generative artificial intelligence examine its implications for marketing processes and visual content (Cillo & Rubera, 2025; Grewal et al., 2025; Hartmann et al., 2025). Evidence from these studies does not establish that a given tool improves outcomes in this field. It does, however, make the governance of drafts, recommendations, personal data, and audience targeting a practical concern.

This article develops a bounded framework for marketing infrastructure in nonprofit senior living services. The purpose is to connect stakeholder listening, data stewardship, human review, and measurement in one planning model. The article does not report a campaign evaluation or an organizational case study. Its contribution is conceptual: it identifies operational questions that practitioners can use before collecting data, deploying automation, or interpreting marketing results.

A persistent gap connects marketing orientation to the internal capacities required to sustain it. Modi (2012a, 2012b) examined its relationship to innovativeness, resource scarcity, performance, and measurement in nonprofit organizations. The literature calls for more than a declared audience focus. It requires routines that allow an organization to understand audiences, coordinate a response, and assess what followed. The Nonprofit Capacities Instrument further frames capacity as a multidimensional organizational resource (Shumate et al., 2017). For these providers, communication quality depends on governance, records, staff roles, and service knowledge as much as on the content of an individual campaign.

The relational character of this sector also changes the meaning of value. Morgan and Hunt (1994) describe relationship marketing through commitment and trust, and Vargo and Lusch (2004) treat value as emerging through service exchange rather than residing entirely in a promotional offering. In this context, families and residents interpret messages through prior contact, recommendations, observed responsiveness, and the consistency of information across channels. The communication system needs to support that interpretation process. It should preserve a route for questions, correction, and clarification when the information available to a prospective resident is incomplete or difficult to understand.

Accessibility is an infrastructure requirement rather than a final editing task. A systematic review

by Peek et al. (2014) identifies multiple factors that shape acceptance of technology for aging in place. Mitzner et al. (2010) similarly document variation in older adults' technology use and attitudes. These studies do not prescribe a universal communication preference for the intended audience. They establish the need to avoid assuming that a digital interaction is sufficient evidence of access, comprehension, or voluntary participation. A communication plan should specify a comparable telephone, paper, or in-person path whenever the information is material to a decision.

Responsible use of artificial intelligence adds another layer to this problem. Jobin et al. (2019) map a broad range of AI ethics guidance, while Raji et al. (2020) describe the need for accountability across the system lifecycle. Selbst et al. (2019) caution that fairness analysis can fail when a technical model is separated from the social context in which it operates. These works support a practical conclusion for marketing in this field. A tool cannot inherit legitimacy merely because its output is fluent, efficient, or data-driven. The organization remains responsible for the evidence, context, audience effects, and decision rights attached to that output.

The article examines the organizational conditions that permit a nonprofit provider to use marketing information, digital tools, and AI-assisted workflows without weakening mission accountability. The contribution is a conceptual model with explicit control points. It specifies where stakeholder evidence enters the system, how claims are linked to records, who reviews a communication before release, and how observed outcomes are interpreted. This formulation provides a basis for empirical testing without presenting the framework itself as proof of effectiveness.

Methods

An integrative conceptual review was conducted on 13 July 2026. Searches and metadata checks used Crossref records, publisher information, and official public materials. The reviewed corpus contained 36 scholarly sources with DOI metadata confirmed through Crossref and three primary public documents. The scholarly sources cover nonprofit stakeholder engagement, relationship marketing, market orientation, digital transformation, artificial intelligence in marketing, privacy, technology access in later life, and AI governance. Public sources were included when they provided the relevant regulatory, demographic, or governance context.

Sources were retained when their title, abstract, or official description addressed a construct used in the framework and when their authorship, publication venue, year, and DOI were confirmed. The corpus includes recent marketing and information-systems research alongside foundational work on nonprofit accountability, privacy, technology use, and algorithmic harms. One recent English-language Springer chapter by Mishchenko (2026) was included because its publication metadata and DOI are verified; its retail-oriented discussion of large language models is used only as an adjacent marketing application, not as evidence of nonprofit outcomes.

Vendor playbooks, organization-specific performance claims, undated promotional pages, and sources with unverified metadata were excluded. This decision removed the unverified impression, conversion, advertising-value, email-open, and click-through figures contained in the submitted manuscript. Those figures cannot be treated as research evidence until their source, collection conditions, and disclosure authorization are documented.

The review is integrative rather than systematic because selection was theory-driven and did not attempt exhaustive database coverage. The synthesis proceeded by identifying recurring operational requirements across the corpus: stakeholder input, lawful and proportionate data use, accountable communication, and cautious interpretation of observed outcomes. This method supports framework construction. It does not estimate effect sizes or establish causal relationships among the proposed elements.

The expanded corpus covered nonprofit market orientation and stakeholder engagement. It also addressed relationship and service theory, digital transformation, later-life technology use, AI governance, and performance measurement. Each retained source was assigned to one or more domains before synthesis. This procedure made it possible to trace a framework element back to a scholarly construct or an official institutional requirement. The resulting bibliography contains 39 sources, including 37 DOI-linked records. Two public documents without DOIs were retained because they define the demographic and regulatory context needed to interpret the

framework.

The synthesis used an evidence-to-claim rule. A source could support a definition, a documented research finding, a methodological caution, or a conceptual relation. It could not support a claim about the performance of an individual provider unless organization-specific data were available and disclosure was authorized. This rule is especially important for marketing metrics. Rust et al. (2004) address the methodological challenge of measuring marketing productivity, and Ebrahim and Rangan (2014) show why social performance needs attention to the scale and scope of the intended effect.

Two quality controls were applied during the synthesis. First, claims about older adults, AI, or nonprofit practice were bounded by the population and setting addressed by the source. Second, proposed operational measures were written as observable records rather than as assumed outcomes. For example, an approved communication can be evidenced by a source record and named reviewer; a causal service benefit requires a separate research design. This distinction prevents conceptual recommendations from being presented as empirical findings.

Results

The synthesis produced a four-part marketing infrastructure. Its first element is mission and stakeholder needs. Organizations need an explicit view of whose questions, risks, and decision contexts are relevant before deciding what to communicate. Fu et al. (2024) characterize organizational listening as a process of soliciting, considering, and incorporating information from stakeholders. Earlier nonprofit research identifies disclosure and dialogic mechanisms as components of online accountability (Saxton & Guo, 2011). The combined literature supports treating audience research and feedback as recurring organizational work rather than a preliminary campaign exercise.

The second element is consent-aware data. Marketing systems often combine inquiry forms, event registrations, referral information, website activity, and communication histories. Their value depends on data quality and on whether each use has a stated and proportionate purpose. Privacy scholarship emphasizes the economic and social consequences of information practices (Acquisti et al., 2016), while marketing research frames privacy as a condition that can shape data-based innovation and customer relationships (Bleier et al., 2020; Cloarec et al., 2024). For organizations subject to federal award requirements, the applicable administrative framework also requires sound internal controls and appropriate management of information (Electronic Code of Federal Regulations, n.d.). The exact legal obligations depend on the organization, jurisdiction, data type, and funding arrangement; this framework therefore calls for a documented legal review rather than a generic compliance claim.

The third element is human-reviewed communication. Digital channels can support timely responses and audience-specific information, yet they also raise the risk that an inaccurate or inaccessible message reaches a person before staff can correct it. Research on nonprofit social media shows that organizations use platforms for informational, promotional, and community-building messages (Lovejoy et al., 2012; Saxton & Waters, 2014). Marketing research describes artificial intelligence as a tool for supporting analytic and interaction tasks (Davenport et al., 2020; Huang & Rust, 2021). In this setting, any use of automation should preserve an accountable person who verifies source accuracy, context, accessibility, and release approval.

The fourth element is mission-linked measurement. Metrics should be selected for the decision they are intended to inform. A form completion, information-session registration, call, referral, or satisfaction response can be useful when a written measurement protocol defines the observation and collection process. None of these observations alone demonstrates that a message caused a service or mission outcome. The framework therefore requires a limitation note whenever a metric may be influenced by seasonal demand, referral practices, capacity constraints, channel access, or changes in data capture.

Table 1 converts these four elements into operational questions and observable evidence. It is designed for planning discussions among communications, operations, leadership, compliance, and service teams. The table does not prescribe a universal software configuration. It identifies the records that allow an organization to explain how an audience decision, data use, communication release, or result interpretation

was reached.

Table 1. Framework elements and evidence-linked measures

Framework element	Operational question	Observable evidence
Mission and stakeholder needs	Whose needs are being heard before a message, service change, or campaign is approved?	Documented audience map, listening record, and accessible contact route.
Consent-aware data	What information is necessary, permitted, accurate, and proportionate for the stated purpose?	Purpose record, consent status, retention rule, and data-quality review.
Human-reviewed communication	Who verifies factual accuracy, accessibility, tone, and audience suitability before release?	Named approver, source record, accessible version, and correction path.
Mission-linked measurement	Which observed change is relevant to the mission and can be interpreted without overstating causality?	Predefined measure, denominator, collection period, limitation note, and learning decision.

The four elements are sequential for planning purposes, yet they form a feedback process in operation. Stakeholder input can reveal that a message is unclear, that a service detail is missing, or that a communication channel excludes part of the intended audience. Such findings may require a change to the data fields collected, the approval workflow, the communication format, or the measure used to assess the change. Figure 1 presents this relationship and places governance and risk review across the cycle.

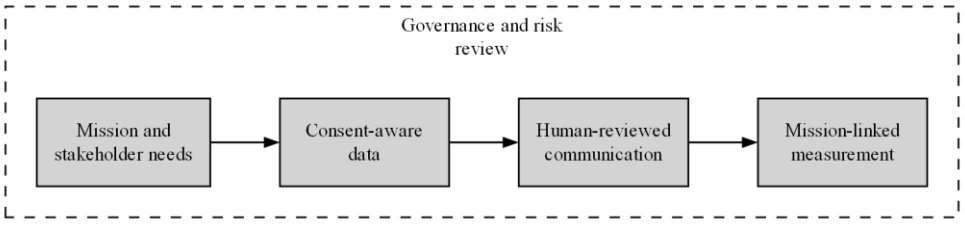

Figure 1. Marketing infrastructure for nonprofit senior living organizations

Source: Prepared by the author from the reviewed literature.

Governance is active throughout the framework. The NIST Artificial Intelligence Risk Management Framework groups relevant activity under the functions Govern, Map, Measure, and Manage (National Institute of Standards and Technology, 2023). These functions are compatible with the proposed cycle because they require organizations to define responsibilities, characterize context, assess risks, and act on the results. They do not relieve an organization of its professional, legal, or ethical obligations.

The literature also indicates why the sector needs an accessibility condition. Technology use in later life varies with factors that include cognitive abilities, attitudes, and prior experience (Czaja et al., 2006). An organization should therefore retain a non-digital route for material information, questions, and consent-related communication. Accessibility should be considered during the planning and approval stages, with the relevant accommodation or alternative format documented where appropriate.

The first result concerns organizational capacity. Market orientation in a nonprofit is sustained through routines for gathering and interpreting information, not through a one-time audience profile. Modi (2012a) addresses market orientation, while Modi (2012b) addresses its measurement. Shumate et al. (2017) provide a broader capacity lens. Taken together, these sources suggest that the organization should treat audience understanding as an owned process. A communications team may coordinate it, yet admissions, resident services, leadership, compliance, and community partners each hold information that can change the meaning or suitability of a message.

The second result concerns the unit of analysis. A campaign is too narrow to capture the relationship work required in this field. The relevant unit is a communication episode that begins with a stakeholder need and ends only when the

organization has a documented basis for learning from the interaction. Morgan and Hunt (1994) provide the trust and commitment perspective, while Vargo and Lusch (2004) explain why value is co-created through service exchange. Jones et al. (2021) add a third-sector example in which organizations represent and communicate experiential knowledge in health service development. These sources support attention to the quality of listening and response, rather than attention only to message delivery.

The third result concerns access. The framework treats a non-digital route as a control that allows the organization to test whether a communication is genuinely reachable. It does not imply that every person should receive the same format. Peek et al. (2014), Mitzner et al. (2010), and Czaja et al. (2006) point to heterogeneity in technology acceptance, experience, and use. The operational implication is that the organization should define which communications require an alternative channel, how that channel is offered, and how staff record a request for assistance without turning accessibility into a marketing label detached from service practice.

The fourth result is a traceability requirement for claims. A public statement, automated draft, recommendation, or campaign segment should be linked to the evidence on which it relies, the permitted audience use, the accountable reviewer, and the date or condition under which it remains valid. This chain is stronger than a general instruction to be careful with AI. It allows a later reviewer to examine why a communication was sent and to correct it when a service, policy, or source changes. It confines drafting assistance to support functions and reserves consequential authority for accountable staff.

The scientific contribution of the framework is the integration of access, evidence, and accountability into the marketing process itself. Existing work describes stakeholder engagement, market orientation, data-driven marketing, and AI governance through different theoretical lenses. The present model connects them through a common decision record. It distinguishes a communication output from the evidence supporting the output, and it distinguishes an observed communication response from a mission-related outcome. This produces a more precise object for study: the quality of the organizational decision path, rather than the apparent success of a single channel.

Figure 2 expresses this contribution as a short evidence path. A stakeholder signal must be translated into a claim and evidence record before an approved decision is released. Human and risk review operate before the decision stage, and measurement returns information for later learning. Accessibility and accountability frame the entire path. The figure can be used during content approval, service-information updates, campaign planning, and post-campaign review because each node corresponds to a record that an organization can inspect.

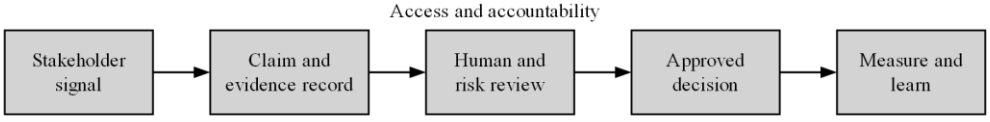

Figure 2. Evidence path for accountable marketing decisions

Source: Prepared by the author from the reviewed literature.

The final result is a differentiated approach to measurement. Measures of communication response, such as a completed inquiry or a request for information, can be valid observations when their collection protocol is documented. They should remain separate from measures of service access, resident or family experience, and broader mission performance. The distinction does not diminish the value of marketing data. A causal interpretation is inappropriate when an observation was collected for a different decision. The framework therefore requires each metric to state its intended use, interpretive limits, and owner before it is reported.

Discussion

The proposed model specifies organizational conditions that make communication credible. A polished email, web page, or advertisement can be useful only when the underlying service information is current, the intended audience is understood, and a responsible person can correct

the record. The model therefore supports coordination across communications, operations, admissions, resident services, compliance, and leadership. Its value lies in making the handoffs and evidence requirements visible before public claims are released.

Artificial intelligence is most defensible in bounded support roles. It may help staff organize non-sensitive feedback, identify duplicate content, retrieve approved source material, create a first draft, or suggest alternatives for plain-language review. Recent scholarship describes generative AI as part of marketing and innovation processes while also identifying substantial research and governance questions (Cillo & Rubera, 2025; Grewal et al., 2025; Heitmann, 2024). Mishchenko (2026) discusses large language models in retail purchase-stage marketing, a setting that differs from this field but illustrates why output review is necessary when systems generate or personalize content.

The boundary for automation must be explicit. A model should not determine eligibility, clinical matters, housing placement, pricing exceptions, or other decisions that substantially affect a person. Research on service AI calls for attention to vulnerable consumers (Hermann et al., 2024). Work on language-model risks warns that generated text can reproduce harmful associations, obscure sources, or create unwarranted confidence (Bender et al., 2021). These risks have practical consequences for communications involving older adults and families who may rely on information during a high-stakes decision process.

Bias review deserves separate attention. Obermeyer et al. (2019) showed that an algorithm used in a health-management context produced a racially biased result because of the target variable and historical data. The study does not examine nonprofit marketing, and its findings should not be transferred mechanically to every communication tool. Its relevance here is methodological: organizations should inspect what outcome an automated system optimizes, whether the data reflect unequal access or historical decisions, and whether the proposed use can be explained to affected people. Floridi et al. (2018) similarly identify beneficence, non-maleficence, autonomy, justice, and explicability as principles for AI governance.

Measurement should remain proportionate to decision risk. Marketing teams may track contacts, inquiries, event attendance, information requests, or subsequent conversations. These measures can support learning when they are defined in advance and interpreted in context. They become misleading when presented as direct proof of mission impact, service quality, or causal campaign effectiveness without an appropriate design. A provider should preserve the underlying definitions and method notes with any internal or public summary.

The framework also identifies limits in the reviewed evidence. Much of the nonprofit communication literature concerns broad nonprofit populations, foundations, or social-media platforms. Marketing and AI studies often focus on commercial settings. Older-adult technology research informs accessibility concerns but does not determine the preferences of any particular resident group. Future studies could test the framework through multi-site qualitative research, staff workflow observation, accessible communication audits, and longitudinal measures that distinguish inquiry, access, experience, and mission outcomes.

There are organizational implications as well. Leadership should designate who owns the audience map, who approves data uses, who verifies communication content, and who interprets measures. The answer may vary by organization size and regulation. The central requirement is traceability: a reviewer should be able to identify the purpose of a communication, the evidence supporting its claims, the staff member who approved it, and the conditions under which its result was interpreted.

The expanded framework provides practical value because it defines the conditions under which an organization may rely on a communication record. A brochure, web page, email sequence, or AI-assisted draft becomes more dependable when a reviewer can identify the source of each material claim, the intended audience, the approval date, and the correction route. This approach supports staff continuity. When responsibilities change, the successor inherits a documented decision path rather than an unexplained set of messages or audience segments.

The model also produces testable propositions. Organizations that consistently document stakeholder input and claim evidence may show higher perceived transparency or trust than

organizations that cannot reconstruct those decisions. Organizations that provide comparable non-digital access for material information may reduce avoidable barriers in inquiry and consent processes. Organizations that apply human review and a traceable approval record to AI-assisted content may detect more factual, contextual, or accessibility defects before release. These are empirical propositions, not conclusions drawn from the present review. Their testing requires defined populations, measures, comparison conditions, and ethical oversight.

Measurement design should match the proposition under study. When a team wants to know whether an accessible information pathway improves comprehension, it needs an outcome measure related to comprehension and a plan for handling differences in prior experience, language, health status, and channel preference. When it wants to assess whether a new workflow reduces staff burden, it needs a time or workload measure that does not confuse faster production with better service. Ebrahim and Rangan (2014) provide a useful reminder that social-performance claims require attention to what is being measured and the scale at which the claim is made.

AI governance becomes operational when the organization can inspect a specific use case. Jobin et al. (2019) identify recurring ethical principles in AI guidance. Raji et al. (2020) frame accountability as a lifecycle practice, and Selbst et al. (2019) explain why a system must be considered in its social setting. Applied to marketing in this field, this means that a review should ask what information the tool receives, what output it produces, whose situation may be affected, and which staff member has authority to approve, reject, or correct that output. A general policy statement is insufficient without those use-case records.

The framework is designed for gradual adoption. An organization can begin with a limited inventory of high-stakes communications, such as service descriptions, eligibility-related information, pricing explanations, consent notices, or family updates. It can then add a source record, reviewer field, accessibility check, and measurement note to the existing workflow. This staged approach respects resource constraints and allows leadership to learn where the process creates value or delay. It also avoids presenting technology investment as the primary solution to a governance problem.

Several limits remain. The literature reviewed here spans nonprofit management, marketing, information systems, AI ethics, and technology use in later life. Its constructs are relevant to this sector, while many studies were conducted in other organizational settings. The framework consequently requires local validation. Researchers should examine how residents, families, staff, and referral partners interpret each control point; which records are feasible to maintain; and whether the model improves access, trust, decision quality, or staff coordination under real operating conditions.

Conclusion

Marketing in this sector requires an infrastructure that links mission, stakeholder listening, data stewardship, human review, and cautious measurement. The framework developed here offers four connected elements for that work: mission and stakeholder needs, consent-aware data, human-reviewed communication, and mission-linked measurement. Governance and risk review apply across the cycle.

The framework does not claim that any channel, tool, or metric guarantees an organizational outcome. It provides a documented basis for making communications more accountable and for assessing whether an automated or data-driven practice is appropriate. Empirical research should test the framework with diverse nonprofit providers and assess its association with trust, accessibility, staff workload, and mission-related outcomes.

The added evidence path strengthens the framework's scientific utility. It gives future studies a defined mechanism to examine: stakeholder signals shape records, records shape review, review shapes communication decisions, and documented measures support later revision. Each relation can be operationalized and assessed without assuming that a digital interaction, a marketing response, or an AI-generated draft represents mission success.

For practice, the central benefit is disciplined communication. The organization gains a way to connect a mission claim to evidence, an audience need to an access route, and a performance measure to an explicit interpretation. That discipline is compatible with digital tools and AI assistance when human responsibility remains

visible. It also gives organizations in this field a defensible basis for deciding when a proposed technology use should proceed, be revised, or be declined.

Data Availability

No new data were created. The review used public bibliographic records and public institutional documents listed in the references.

Consent For Publication

Not applicable.

Conflict Of Interest

The author is employed by LeadingAge PA. No organizational performance data were used, and the article does not evaluate services provided by LeadingAge PA.

Acknowledgements

None.

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