



The state of wellness programs in CCRCs

Programming, design and operations contribute to a culture of wellness in continuing care retirement communities, according to a recent national study

The passion and energy of the Baby Boom generation has redefined society for decades. Now, as this generation heads into retirement, its life-affirming values have spurred a cultural shift in the way people view and plan for retirement. For Boomers, whole-person wellness is not a concept, but a way of life. And they expect quality choices in how they spend the years of retirement rolling out before them.

To understand this cultural shift and develop a national profile of wellness-program components in continuing care retirement communities (CCRCs), the *National Whole-Person Wellness Survey* was recently conducted by three institutions:

- Mather LifeWays, a not-for-profit organization that creates “ways to age well” for older adults through community initiatives, senior living residences, and the Mather LifeWays Institute on Aging
- Dorsky Hodgson Parrish Yue, an architectural firm specializing in design for senior living
- Ziegler Capital Markets Group, a financial services company with

expertise in financing senior living projects

Although the survey was conducted on a relatively small sample, this sample was diverse in many ways, including geographically. The final report on this research is significant because it provides a baseline for the progress that CCRCs have made in developing a “culture of wellness.” The report also offers insight into this progress and how communities are working to meet the needs of Boomer retirees.

Three stages of wellness

The *National Whole-Person Wellness Survey* looks at various aspects of CCRCs to identify how some have achieved a culture of wellness. Three stages of wellness are identified through the survey and labeled as Trailblazers, Travelers and Tenderfeet. These labels measure the different points on a CCRC’s journey to a comprehensive culture of whole-person wellness. According to the survey findings, although about half of the surveyed CCRCs are Tenderfeet, almost any community has the potential to be a Trailblazer.

Released in October 2007, the final report reveals that most of these communities are accelerating their focus on quality of life and wellness. Whole-person wellness embraces self-responsibility and direction, optimism, self-worth, and lifestyle choices. To measure whole-person wellness, the survey examines a CCRC’s programming, design, and operational elements through six dimensions of wellness (physical, social, emotional, spiritual, intellectual and vocational).

“A major goal for the survey was to assess how CCRCs are incorporating the elements of whole-person wellness from a philosophical, staffing, physical and financial standpoint,” says principal investigator Perry Edelman, PhD, director of outcomes research at the Mather

LifeWays Institute on Aging. “The findings have significant implications for CCRC residents, but also for staff and entire senior living communities.”

In a culture of wellness, everyone is a participant—from residents and staff to the surrounding community. Additionally, respondents report that the factors most essential to creating a successful wellness program are: organizational commitment, program/activity variety, trained/experienced staff, programs appropriate to residents’ abilities, and financial resources.

Assessing progress

In identifying clusters of CCRCs in terms of their progress toward a culture of wellness, the *National Whole-Person Wellness Survey* assesses eight specific organizational aspects of wellness:

- written wellness objectives for the community
- resident wellness team, or team that includes residents
- more than two departments included in wellness team
- staff wellness is part of mission statement or objective
- staff uses resident wellness programs
- staff-only wellness programs
- more than two groups use wellness programs (excluding residents)
- staff hired in the past five years specifically to implement wellness programs

The extent to which each CCRC has incorporated these elements into its community identifies where it is on the journey toward a culture of wellness.

Trailblazers have a well-developed culture of wellness, exhibiting most, if not all, of the eight components. About one-fifth of the survey respondents fall into this category. All the respondents in this group include staff wellness as part of their mission statements and enable staff to use resident wellness programs.

Trailblazers believe that their wellness programs have had a major impact on the reduction of residents’ use of medication and on their healthcare centers. These organizations also report a greater impact of wellness programs in terms of visibility and image in the community and in the ability to obtain greater market share.

Travelers have traveled varying distances toward a culture of wellness, with 70% of these respondents having four to five of the basic components. About one-third of the respondents are in this category. A majority of Travelers have hired staff in the past five years specifically to implement wellness programming, and have more than two departments included on wellness teams. However, only 12% include staff wellness as part of their mission statements and/or objectives.

Tenderfeet have almost no culture of wellness. Fully 97% of survey respondents in this group have two or fewer of the eight components. Slightly less than half the CCRCs surveyed are Tenderfeet, while none have hired staff in the past five years specifically to implement wellness programming and only 10% have staff-only wellness programs. However, 26% have resident wellness teams and 29% have two or more departments included on wellness teams.

The research also assesses the impact of wellness programs—from quality of life for residents to image building within the community. Using 25 items and a seven-point scale (with seven signifying the greatest impact), respondents ranked the impact of wellness programs at 5.4 for overall quality of life. Moreover, they scored each of the 25 items at or above a four. Using this same scale, the survey measured the impact of wellness programs on the satisfaction of residents and

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family members, and on the decision to join the community. Nearly three-quarters of survey respondents ranked family member satisfaction at five or greater, while more than half scored six or seven for impact on the decision to join the community.

Physical spaces and program costs

Wellness is also affected by physical design. The *National Whole-Person Wellness Survey* identifies the spaces CCRCs provide and the wellness dimensions the spaces relate to, as well as their locations within the CCRC. To achieve wellness, spaces should be designed to meet residents' needs and encourage participation in the programming developed for those spaces.

“Designing for wellness, not illness, is now the focus in senior living—and it’s with a holistic approach,” says Cornelia C. Hodgson, head of Dorsky Hodgson Parrish Yue’s Senior Living Studio. “This study has provided a crucial benchmark that will enable us to better understand the correlation between whole-person wellness elements and physical design, programming and financing.”

The survey evaluates design space based on its capacity, ceiling height, and num-

ber of windows, because these rate the appropriateness of the space for function, “specialness” of the space, and exposure to nature. Four design trends emerge that influence whole-person wellness:

- **Size.** Successful spaces are sized appropriately for the wellness function they serve.
- **Natural light.** Most successful spaces have at least some windows, with physical and social dimensions having many windows and spiritual spaces having the least.
- **Usage.** Except for worship spaces, most successful spaces tend to be used five to seven days per week.
- **Location.** Most wellness spaces are distributed throughout the CCRC campuses, but in relatively close proximity to other wellness spaces.

Operationally, managing the costs of a wellness program is cited by more than half the respondents as one of the top five most important factors in successful programming. Most respondents report that wellness program costs have increased in the past five years, while more than a third report that they have stayed the same. However, cost increases are attributed largely to expanded activities and services. While most CCRCs are currently not charging fees to nonresi-

dents for use of their wellness programming, many are considering it for the future as an opportunity to generate revenue.

The reasons respondents cite for the rising costs in wellness programming include increases in the number of activities, extended programs, and increased participation. To cover these costs, the majority of CCRCs will consider raising resident monthly fees to cover programming, while others will consider alternatives such as fundraising, fitness center membership fees, or individual program usage fees.

A journey towards wellness

The *National Whole-Person Wellness Survey* results give senior living providers a better understanding of how the concept of wellness is incorporated into facilities and what its impact is on residents and staff. This research identifies industry best practices and sheds light on how CCRCs are implementing wellness-related programs. Just as importantly, the survey identifies ways that wellness-related changes have been made in the past—and what changes will be needed for future generations of residents.

Most CCRCs surveyed for this study have at least begun to embrace the idea of whole-person wellness, the study shows. And most anticipate expanding their wellness programs in the coming years. To that end, this research will contribute to establishing a baseline for wellness in CCRCs, which communities can use as a map to track their progress on the journey towards whole-person wellness. ☺

For information on how to receive a copy of the National Whole-Person Wellness Survey Final Report (PDF or printed copy), visit www.matherlifeways.com/re_nationalwellnesssurvey.asp.