

Seniors Housing & Care Journal

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2015

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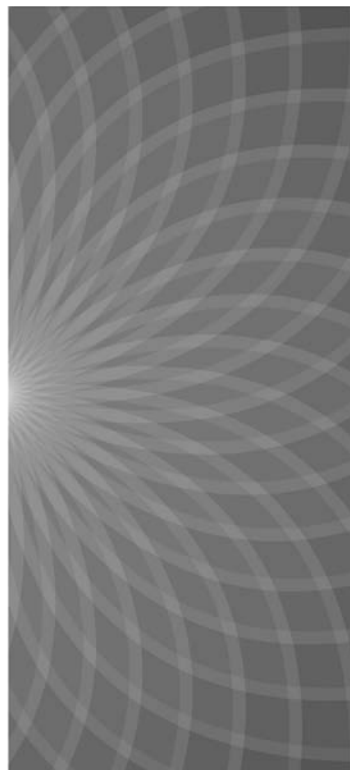
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NIC

The National Investment Center for Seniors Housing & Care (NIC) is a 501(c)(3) organization whose mission is to advance the quality and availability of seniors housing and care options for America's elders. NIC provides research, education, and increased transparency that facilitate informed investment decisions, quality outcomes and leadership development in seniors housing and care.

Since 1991, NIC has been the leading source of research, data, and analytics for owners, operators, developers, capital providers, researchers, academics, public policy analysts, and others interested in meeting the housing and care needs of America's seniors. NIC has proudly sponsored the *Seniors Housing & Care Journal*, a peer-reviewed journal for applied research in the seniors housing and care field, since 1993.

One of NIC's major initiatives to further its mission is the NIC MAP® Data Service (NIC MAP). NIC MAP is a web-based suite of research and analysis tools that track and report seniors housing and care data, enabling users to gain access to more than 13,000 properties within 99 U.S. metropolitan markets and more than 600 counties. Established in 2004, NIC MAP creates transparency for seniors housing and care by offering accurate, unbiased, and actionable market-level data on all of the sector's property types and care segments, including independent living (IL), assisted living (AL), memory care and nursing care, as well as continuing care retirement communities (CCRC). Our data is updated quarterly, monthly, and weekly, and are inclusive of property-level inventory by unit type, sales transactions, properties under construction and in the planning phase, aggregated occupancy and rent comparables, demographics, and much more.

For more information, visit www.nic.org or call 410-267-0504.

MATHER LIFEWAYS

Mather LifeWays is a unique, non-denominational not-for-profit organization based in Evanston, Illinois, founded more than 70 years ago. We are dedicated to developing and implementing Ways to Age WellSM by creating programs, places, and residences for today's young-at-heart older adults. Staffed by nationally recognized researchers, Mather LifeWays Institute on Aging is an award-winning resource for research and information about wellness, aging, trends in senior living, and successful aging service innovations. The Institute shares its cutting-edge research in order to support senior living communities and others that serve older adults, in areas including effective approaches to brain health, ways to enhance resilience, and successful employee wellness programs. Mather LifeWays Institute on Aging collaborates with NIC to produce the *Seniors Housing & Care Journal*. To learn more about Mather LifeWays Institute on Aging, call 888-722-6468 or visit www.matherlifewaysinstituteonaging.com.

INTRODUCTION – SENIORS HOUSING & CARE JOURNAL 2015

The 2015 *Seniors Housing & Care Journal* continues its tradition of disseminating empirically based research and commentaries focused on critical issues faced by professionals in the field.

Demonstrating the richness of how program implementation, evaluation, and research can be used to improve planning, operations, and policies in all forms of senior living, **articles in this edition focus on issues related to both resident quality of life and community operations.**

As in the past, the *Journal* editors selected one outstanding research article for special recognition, generously sponsored by Prudential Real Estate Investors. *Relationships Matter: The Importance of Friendships Among Residents of Independent Living Communities*, written by **Kristen Paris, Edie Smith, Rachelle Bernstecker, and David Schless**, highlights the importance of social relationships and camaraderie in residents' evaluations of their living communities. Based on a sample of 126 independent living communities from 11 major markets in the United States, the researchers **found that “feeling at home” is more strongly related to residents' sense of camaraderie among fellow residents than it is to quantities of activities or amenity spaces available in their communities.** Further, formal activities offered by communities do not seem to affect residents' sense of social connectedness, but informal activities, such as entertaining in private residences or eating meals in a communal dining room, are more impactful drivers of feeling connected. Recognizing the importance of friendships among residents would be wise for senior living personnel, as social connectedness affects both resident quality of life and residents' likelihood to recommend the community to others.

The next three papers detail other aspects of resident quality of life based on empirical research. Shifting from an intracommunity to intrapersonal perspective on quality of life, **Jennifer Smith explores the importance of self-compassion on psychological well-being, finding that higher self-compassion in independent living residents helps reduce the negative effects of high stress and poor health on one's levels of happiness and depression.** In a follow-up to their award-winning 2008 paper, **Eric Bardenhagen and Susan Rodiek detail the merits of their “Seniors' Outdoor Survey,” a tool to evaluate senior living facilities' outdoor spaces,** which have been shown to be important in contributing to resident health and well-being. Another important component of resident quality of life, cognitive health, was the focus of the next empirical paper. In it, **Catherine O'Brien and Roscoe Nicholson evaluate resident perceptions of a multidimensional program oriented toward reducing cognitive decline and improving memory abilities of senior living residents.**

Three thought-provoking commentaries follow the above empirical research papers. **Steven Orfield makes the case for utilizing research-based design when designing environments for older adults with dementia,** arguing that by focusing primarily on care and security components, traditional dementia settings designers have failed to optimize resident perception and cognition. **Lisa Morgenroth and Michael Hanley detail the benefits of situating senior living environments in higher education settings.** Doing so can provide increased opportunities for multigenerational interaction, continuing education, and community engagement, all of which are increasingly important for the baby boomer market. Next, **Ryan Frederick applies knowledge from business academia on the importance of innovation** in a commentary intended to guide seniors housing executives as the industry embarks on a changing course.

This issue concludes with a first-time offering for the *Journal*, an Executive Roundtable. **Interviewed by Jane Adler, industry executives (Bill Pettit, Torey Riso, Kristen Bolling, Kurt Read, and Kathryn Sweeney) provide first-person insights about topic areas relevant to all in seniors housing: quality, leadership, and affordability.**

We appreciate the efforts of the *Journal's* Editorial Board members, who spent considerable time reviewing submissions to ensure their quality and significance. We further want to acknowledge our colleagues in the field who identified articles for consideration that are of benefit to readers, as well as referring numerous authors. Finally, we are indebted to Technical Editor F. Gill as well as Associate Managing Editors Scott King and Jennifer Smith, who have shepherded this edition to conclusion.

The *Journal* continues to publish research that contributes to the senior living field and has direct application for day-to-day operations. Just as the seniors housing field continues to grow and mature, we hope to grow the *Journal* in the future by adopting a more executive-friendly format focusing on topics most relevant for seniors housing providers and investors, starting in 2016 with emphases on asset transparency, leadership development and talent selection, availability and affordability of seniors housing, and quality outcomes. If you would like to submit an article for publication in the 2016 edition, please direct your e-mail to Associate Managing Editor Jennifer Smith, jsmith@matherlifeways.com.

Sincerely,

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Relationships Matter: The Importance of Friendships Among Residents of Independent Living Communities

Kristen V. Paris, PhD, Edie R. Smith, Rachelle Bernstecker, David Schless

Being satisfied in a senior living community is dependent on feeling “at home.” Social relationships play a vital role in a resident’s quality of life and sense of feeling at home. This study investigates the importance of social relationships among residents of age-qualified communities, and why some residents have difficulty making friends and forming close relationships with other residents.

A total of 6,858 residents living in rental independent living communities participated in this study. Participants completed a survey that measured their sense of feeling at home, attributes of their private residence, psychographic characteristics, satisfaction with specific attributes and services of the community, and demographic information.

Fifteen percent of residents of senior living communities indicated they didn’t feel at home in their community. Among those who didn’t feel at home, the largest proportion explained that they felt this way because it was difficult to make friends, they were lonely, they had nothing in common with others at the community, there were cliques in the community, or they missed their former friends. The stronger the sense of camaraderie residents had with others at their community, the more positive they were about living in the community. Residents with the strongest sense of camaraderie were significantly

more satisfied than other residents with the various social opportunities in and outside the community. They also participated more frequently in informal social gatherings such as entertaining others in their residence or eating a meal in the community dining room.

These findings have implications for residents’ well-being in senior living communities. For example, staff members should eagerly learn who new residents are, what they like, and how to best help them form social connections with other residents. Those with health problems and limitations likely have difficulty and/or are uncomfortable participating in activities and programs that would otherwise help them form social relationships with others. Awareness and sensitivity training regarding the health and limitations of others should be emphasized among residents, community executives, and frontline personnel. Senior living communities, such as the independent living communities that participated in the current research, are charged with the task of helping their residents live longer better by providing them with the opportunities, circumstances, and environments necessary for forming close, meaningful friendships.

Social engagement has numerous physical and mental health benefits. Although increased social opportunities are a major benefit for many older adults residing in a senior living community, not all residents are equally at ease in forming friendships. Having a sense of camaraderie is strongly associated with satisfaction and participation in various social activities within the community. This article demonstrates the importance of promoting social connections among residents, especially given that some residents (particularly those with health problems and limitations) have difficulty making friends and forming close relationships.

Self-Compassion and Resilience in Senior Living Residents

Jennifer L. Smith, PhD

Older adults encounter age-related challenges that may threaten their sense of security and autonomy, and defensive responses to these challenges, such as avoidance and self-criticism, can exacerbate or prolong difficulties. Initial research suggests that self-compassion (i.e., treating oneself with care and understanding during stressful situations) may be an important factor that influences how people respond during difficult situations as well as their willingness to accept assistance; however, most previous research has been conducted with younger populations. The purpose of the current study is to examine the relationship between self-compassion, stress, and health on psychological well-being in senior living residents.

A total of 102 independent living residents in a continuing care retirement community (CCRC) participated in this study. They completed a survey that measured self-compassion, perceived stress, general health, happiness, depression, and demographic variables.

Higher self-compassion was related to greater psychological resilience in older adults. For participants with low self-compassion, higher levels of stress and poor health predicted lower levels of happiness and higher depression. Higher self-compassion buffered these negative outcomes. For participants with high self-compassion, stress and health levels were unrelated to happiness, and the relationship with depression was weaker.

These findings have implications for residents' well-being in senior living communities. For example, self-compassion training may be effective at easing the transition between levels of care within CCRCs. The fundamentals of self-compassion may also be incorporated into a senior living community's culture, including programs and messaging to residents. Employees could be trained to use self-compassionate language during difficult conversations with residents. Beyond individual concerns, developing a self-compassionate culture also has the potential to increase feelings of belonging within the senior living community.

The ability to weather the inevitable adverse situations and recover with a renewed outlook is beneficial to staff, residents, and associated family members. Self-compassion has the potential to increase resilience to stressful events. In particular, the application of self-compassion training in improving care transitions is of great interest to senior living operations, because delayed care transitions lead to increased cost and risk. Staff can be trained on how to use self-compassion to create effective communication strategies for navigating the care transition discussion.

Using the SOS Tool to Evaluate Outdoor Spaces in Seniors Housing

Eric Bardenhagen, PhD, RLA, ASLA; Susan Rodiek, PhD, NCARB, EDAC

Although access to nature can improve the health and satisfaction of residents, many existing outdoor spaces appear to be underutilized, even in new, upscale senior living facilities. Staff, administrators, and executives may understand the importance of outdoor access but have difficulty planning and budgeting for outdoor space in senior communities because they lack evidence-based tools for evaluating outdoor spaces. The SOS Tool (Seniors' Outdoor Survey) was developed to fill the need for a valid and reliable way to evaluate a facility's outdoor environment based on how well it supports the needs and preferences of aging residents.

This tool was tested for validity (includes all important features), and reliability (gives consistent results). Validity was established by triangulating preferences from 1,128 residents, behavioral outcomes at 68 facilities, and input from 53 acknowledged experts on the topic. Reliability was tested at a total of 116 outdoor spaces at 79 senior care facilities in the U.S. and Italy. The inter-rater reliability of the SOS Tool was found to be high when tested in the U.S. and Italy (.91 and .97 correlation between raters), where .70 is typically considered adequate reliability of an evaluation tool; the levels of test-retest reliability were also high. These results show that the SOS Tool can be used to consistently and reliably assess the

quality of outdoor space in a wide variety of real-world settings.

The SOS Tool can be used to evaluate the 60 most important physical features impacting residents' outdoor usage and satisfaction, organized into five categories or "domains." People in any role, without specialized expertise, can use a rating scale to rate outdoor spaces in terms of the functional support they provide for frail elderly residents. Providers and public health officials can use the tool to compare different outdoor areas and determine what should be improved. Designers can use the tool as a checklist for the features most important to residents. Researchers can use this standardized instrument to compare outdoor usage and satisfaction across multiple facilities. This practical and user-friendly new tool makes it more feasible to improve outdoor access for seniors, benefiting their health and satisfaction levels, and potentially impacting occupancy levels.

Considerable research demonstrates the positive effect of spending time in nature on emotional and physical health. The way in which the outdoor environment is designed can enhance or diminish older adults' connection to nature. Senior living developers and staff may overlook opportunities to maximize this connection in the design and utilization of the space for their community. This article describes a validated tool that can be used to assess the outdoor environment of a senior living community in terms of the physical features most important for the residents' usage and satisfaction.

Senior Living Residents' Perceptions of the Boost Your Brain & Memory Program

Catherine O'Brien, PhD, MPH; Roscoe Nicholson, MA

Among individuals 85 and older, roughly one-third (32%) have Alzheimer's disease. At one time, it was thought that whether or not an individual developed Alzheimer's disease was strictly a matter of genetics. In recent years, however, there has been a large and growing body of evidence that suggests much of the risk of dementia is due to lifestyle behaviors. Current research suggests that engaging in "brain-healthy" behaviors, such as physical activity, stress reduction, and intellectual activity, can have a positive impact on the brain and help ward off signs and symptoms of dementia. Maintaining cognitive health ranks as a high priority among older adults who are expecting senior living communities to provide them with a variety of brain games and programs to meet their needs. The purpose of this study was to evaluate the Boost Your Brain & Memory Program, a multidimensional program designed to promote cognitive health through lifestyle factors.

A total of 162 independent living residents in 12 senior living communities participated in this study. Participants from intervention and control groups completed a survey that measured self-reported memory self-efficacy, memory optimism, changes in brain-healthy behaviors, knowledge about brain health, and program satisfaction.

The Boost Your Brain & Memory Program increased participants' knowledge and motivation to participate

in behaviors associated with cognitive health, as well as their optimism and confidence related to memory. Almost all participants reported having made lifestyle changes during the program and were planning to make further changes.

These findings provide useful information for senior living communities considering how to best meet the demand for brain health education and programming among their residents. The study demonstrates that residents have an interest in brain health that extends beyond computer-based games to brain health programs focused on adoption of brain-healthy behaviors. In addition, it suggests that residents are motivated to make behavior changes they believe will reduce their risk of dementia. Lastly, findings suggest that providing such programming can boost residents' optimism and confidence related to memory.

Older adults are attracted to communities that offer programming to address their fear of dementia and reduce their risk of acquiring the disease. In recent years, a number of programs have been developed to encourage older adults to participate in "brain-healthy" behaviors. One such program, Boost Your Brain & Memory, was developed and tested among a population of older adults residing in senior living settings. Senior living staff can learn from and adopt some of the strategies described in the program evaluation as they seek to implement their own brain health programming.

Dementia Environment Design in Seniors Housing: Optimizing Resident Perception and Cognition

Steven J. Orfield

Older adults in seniors housing and nursing care generally exhibit strong losses in most areas of perception. At age 90, many of these losses can be so substantial that they challenge their perceptual performance in seniors housing. Thus, our previous article in *Seniors Housing & Care Journal* (2013) focused on dramatically improving perceptual performance via environmental design. This article focuses on dementia and the additional cognitive losses that accompany dementia. These losses can be partially compensated for by design for cognitive clarity, simplicity, and way-finding ease.

It is clear that the perceptual solutions in senior housing have the potential for substantial improvement in perceptual clarity. In the cognitive design area, we would expect similar results. The perceptual clarity is achieved by specification of materials and systems, and by modeling and measurement of these solutions. Cognitive improvement occurs via a series of steps to dramatically reduce the amount of detail in the environment and to further reduce the stimulus value of the perceptual environmental design.

Perceptual solutions are directly proportional to the increase measured in perceptual clarity. For example, increasing floor by 50% is like increasing lighting on the floor by that amount. Cognitive simplifications are intended to provide a significant benefit in the need for less

processing of complex environments. This has not been measured, but it is well established that less complex tasks have fewer errors and faster task speeds.

From a resident standpoint, environmental design can dramatically impact the experience and the resilience of the population. Clearer and simpler tasks lead to more engagement; the resident increases performance from communications through socialization and to activity levels as well as engagement. The costs of these changes in design can be budgeted in the normal design and construction of seniors housing or nursing facilities, thereby resulting in great impact on resident engagement, comfort, and environmental clarity, with minimal cost of investment.

On Campus and in the Community: How Higher Education Can Inform Seniors Housing Models

Lisa Morgenroth, Assoc. ALA; Michael Hanley, ALA

As baby boomers continue to define the aging population in the U.S., they are reshaping the seniors housing market. One promising model is co-locating seniors housing on or near college campuses. This multigenerational model will help combat widely recognized issues that face seniors, such as isolation, a sense of being disconnected or irrelevant, and will provide ready access to fitness and health care facilities.

Living near or adjacent to higher education campuses can provide social and economic opportunities to seniors, students, and universities. This is not dorm living for elderly; rather, these are socially vibrant, intellectually stimulating, and multigenerational communities for members of our society who have much to offer and want to continue to engage in their surroundings in a meaningful way.

No single model for university-based retirement communities exists; the diverse desires of the young-old population calls for diverse design solutions. In addition, it is essential to understand the key economic drivers of both communities, and to develop a range of financial and business models for the coexistence of senior living and higher education where all stakeholders benefit. Creating a truly symbiotic relationship is, of course, a key ingredient to creating a sustainable housing model.

Finally, building community does not always mean building buildings. We must also invest in infrastructure, amenities, and meaningful opportunities

for connection. Much of this already exists on and around university campuses. Tapping into those to make the most of existing resources is a great way to foster mutual appreciation between the higher education communities amongst the adjacent residential communities of all ages.

Making Innovation Work: Ambidextrous Organizations in the Seniors Housing and Care Industry

Ryan Frederick, MBA

For a variety of reasons, including demographic-, psychographic-, and government-related reasons, the seniors housing and care industry is set for tremendous change. This change will represent new opportunities for growth, channels of revenue, and ways to add value to consumers. It will also challenge the industry's existing business models and paradigms of thinking. This article leverages insights from business academia, including the "ambidextrous organization" concept, to suggest strategies and planning techniques to balance exploiting current business models with exploring new opportunities. It surveys proven constructs for innovation utilized outside of seniors housing and care, including those studied by leading academics at Harvard Business School and Stanford Business School, and applies them to the current and anticipated future state of the seniors housing and care field.

The key elements for a successful organization in the field in today's environment will include: (a) questioning core assumptions of the industry; (b) creating a compelling vision for growth; (c) initiating organizational changes to position for success; (d) introducing a vernacular for innovation; and (e) establishing accountability for today and tomorrow. These findings have important implications for leaders of today's organizations. Organizations must move beyond talking about innovation and begin to

practice innovation. They must be able to discern the difference between incremental innovation (called sustainable innovation) and innovation that may turn existing business models upside down (called disruptive innovation), and they must be comfortable investing in both simultaneously. This effort may require a cultural shift for many stakeholders within a seniors housing and care organization, including senior leadership, board of directors, investors, employees, and residents.

2015 Executive Roundtable: Three Top Issues Facing Seniors Housing & Care

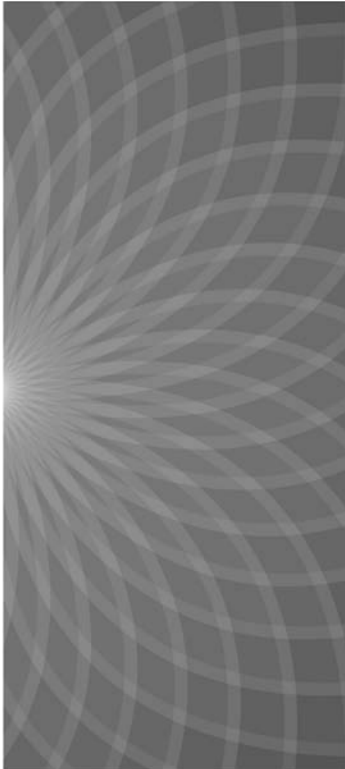
Industry Leaders Discuss Quality, Leadership, and Affordability

Moderated and Edited by Jane Adler

The seniors housing and care industry has gained wide consumer acceptance and continues to grow, but while the industry has not yet fully matured, the issues it faces today are different from the ones it confronted when the sector first emerged decades ago. *The Seniors Housing & Care Journal* recently brought together top industry leaders to discuss the key issues facing building operators, owners, and investors. The executives focused on three significant challenges: quality, leadership, and affordability.

The roundtable panel found consensus on a number of points. Quality measures are emerging as an important factor at all levels of seniors housing and care. Panelists expect quality measures to be required by partners in the health care continuum. Recruiting the next generation of industry leaders along with qualified direct caregivers is an immediate concern. The panelists believe industry efforts need to be coordinated to reach top college talent with a message that emphasizes opportunity. At the same time, additional outreach must be made to community colleges and trade schools to train hands-on workers. While the private-pay seniors housing segment has focused on high-end properties, panelists acknowledged that the vast majority of elders will need a more moderately priced housing alternative. Older buildings with a lower real estate value could be recycled for those with lower incomes.

Other solutions will emerge; notably, they include room sharing, new models for the delivery of care, and flexible options for service packages. Panelists also expect entrepreneurs to experiment with new housing models that deploy technology to help find solutions.



CALL FOR PROPOSALS: SENIORS HOUSING & CARE JOURNAL 2016

The National Investment Center (NIC) and Mather LifeWays are pleased to announce a call for paper proposals for the *Seniors Housing & Care Journal*. The 2016 issue of *Seniors Housing & Care Journal* will address critical issues for the senior living industry, including:

- Quality
- Leadership development and talent recruitment/retention
- Availability and affordability
- Data transparency

To help support applied research and innovative thought on these important topics, the authors of published research articles will receive monetary honoraria.

Deadline for article proposals is **Monday, November 16, 2015**.

For instructions for authors and more information about *Seniors Housing & Care Journal*, visit www.matherlifeways.com/shcj.asp.

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