# Resident Engagement:

## A PRIORITY FOR TOMORROW'S LIFE PLAN COMMUNITY

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# HOLLERAN
COMMUNITY ENGAGEMENT RESEARCH & CONSULTING

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## Resident Engagement: A Priority for Tomorrow's Life Plan Community

The idea of securing feedback from residents about their satisfaction with a campus is far from new—Holleran Consulting pioneered the measurement of the resident perspective 25 years ago. Campuses have found this feedback invaluable for action planning around where identified improvements are needed. But, as the Senior Living field has evolved and competition has stiffened, residents' expectations of what can and should be achieved on the campus where they choose to live have expanded beyond the provision of basic services.

> **Resident Engagement is the new measure necessary to capture how well a community is recognizing and acting on the higher level needs and expectations of today's residents.**

Communities that focus on providing a holistic living experience with the necessary supports for the successful aging of their residents are ahead of the game in differentiating themselves from the competition and keeping their occupancy high.

Satisfying residents is not enough. Just because residents are satisfied with their campus, does not necessarily mean they see the community as an engaging environment where one can successfully age. To help residents age well, Life Plan Communities must move beyond merely satisfying their residents' basic needs to fully engaging residents in a meaningful way. Resident Engagement is the new measure necessary to capture how well a community is recognizing and acting on the higher level needs and expectations of today's residents. The era where a basic satisfaction feedback loop provides sufficient data for success is over.

### ENGAGEMENT & SATISFACTION: A Matter of AND, Not OR

The Holleran Resident Engagement model is made up of research-based and thoroughly tested Engagement factors, in addition to a section of community-selected satisfaction factors from the Holleran National Benchmark. To understand why both satisfaction and engagement are important for prosperous aging, consider Abraham Maslow's famous Hierarchy of Needs model (Maslow, 1943; 1954). According to this model, people's motivations are driven by five levels of needs: physiological (food, warmth), safety (security, shelter), belongingness (intimate relationships), esteem (feelings of accomplishment), and self-actualization (achieving one's full potential). These needs are hierarchical in that lower rung needs must be met before one can achieve higher level needs.
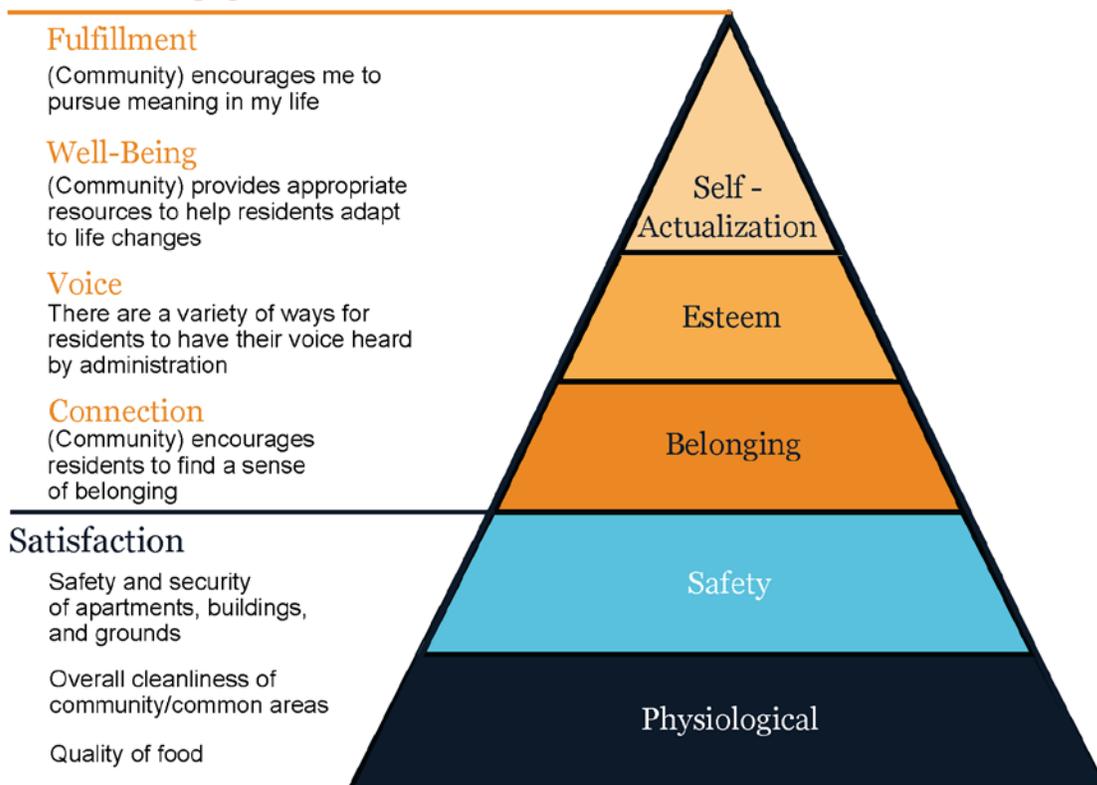
With senior living residents, the bottom two rungs of Maslow's Hierarchy are analogous to meeting satisfaction needs—e.g., good dining options, access to care, clean facilities. For the past two decades, many Life Plan Communities have done a great deal of work to ensure they are satisfying these needs for residents. However, as Maslow's Model

suggests, those bottom two rungs represent only the basic needs of individuals and satisfaction is only one part of the picture of successful aging.

To complete the picture, Life Plan Communities must also facilitate residents' pursuit of higher level needs—such as social connection and personal fulfillment. In the context of senior living communities, Holleran defines these higher level needs as **Resident Engagement**. A priority for tomorrow's Life Plan Communities is to understand and quantify the engagement level of their campus today.

### Holleran Adaptation of Maslow's Hierarchy of Needs

**Resident Engagement**

**Fulfillment**
(Community) encourages me to pursue meaning in my life

**Well-Being**
(Community) provides appropriate resources to help residents adapt to life changes

**Voice**
There are a variety of ways for residents to have their voice heard by administration

**Connection**
(Community) encourages residents to find a sense of belonging

**Satisfaction**

Safety and security of apartments, buildings, and grounds

Overall cleanliness of community/common areas

Quality of food

*Pyramid levels (top to bottom): Self-Actualization, Esteem, Belonging, Safety, Physiological*

Though engagement may be the next step for Life Plan Communities, this does not eliminate the need for measuring satisfaction. The Hierarchy Model holds that lower level needs must be satisfactorily met before higher level needs can be addressed or attained. If your campus is not largely successful in meeting or exceeding those lower level needs, the chances of realizing the higher level needs are extremely remote. That's why the Holleran resident survey asks both satisfaction AND engagement oriented questions. Odds are good that if your campus scores well on the lower level needs (satisfaction), you're in a good position to start meeting the higher level needs (engagement).

**THE FOUR DOMAINS OF ENGAGEMENT: Addressing the Higher Level Needs of Residents**

The higher level needs of residents fall within the top three rungs of the Hierarchy Model—belongingness and love needs, esteem needs, and self-actualization needs. Once people's basic needs are met, their motivation changes to focus on higher level needs. Higher level resident needs have been categorized by Holleran researchers under four domains, which together comprise Resident Engagement:

1. **VOICE** – Engagement with the Campus
2. **CONNECTION** – Engagement with Others
3. **WELL-BEING** – Engagement with Health and Wellness
4. **FULFILLMENT** – Engagement with Life Goals

These four domains are the building blocks of Resident Engagement—combining to create an overall Engagement Index for Life Plan Communities. This Index is calculated based on how well a community performs in each domain compared to Holleran's extensive database of Life Plan Communities. Holleran's Resident Engagement Index

### Resident Engagement Index

LESS ENGAGING          MORE ENGAGING
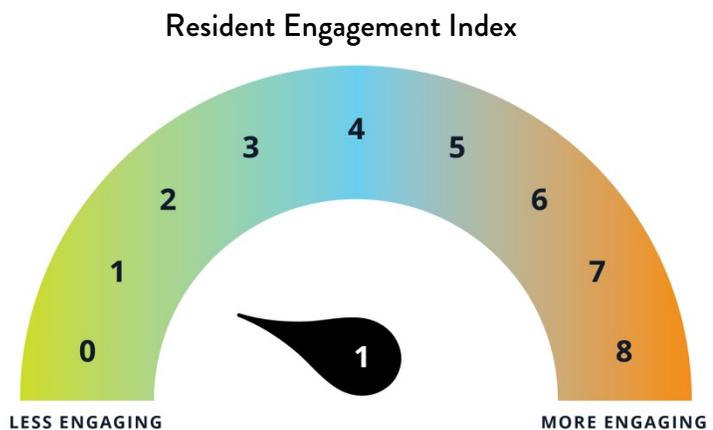
offers communities the means to understand both their absolute levels of engagement, as well as, a comparison to benchmark themselves against other campuses.

Moreover, the inclusion of satisfaction items allows communities to understand how their specific services, amenities, and offerings drive each of these domains. These key drivers provide communities with actionable ways to increase their campus' domain scores and subsequently their residents' level of engagement. The Holleran Index gives communities the means to lay the foundation of Resident Engagement and become the Life Plan Community of tomorrow.

**VOICE DOMAIN—ENGAGEMENT WITH THE CAMPUS**

Having control over one's environment and life is a fundamental aspect to psychological well-being at any age, but may be especially important for older adults for whom environments and limitations may not lend themselves to the degree of autonomy they once had (Schulz, Heckhausen, & O'Brien, 1994). Greater levels of autonomy and control among older adults are associated with lower health risks, lower healthcare costs, and lower mortality rates (Grembowski et al., 1993; Seeman &

Lewis, 1995; Shulz, et al., 1994). Communities that promote residents' *Voice*—through everyday choices and having a voice in the community itself—will also promote better outcomes for their residents.

"It's a new era," says Tim Johnson, CEO of Frasier in scenic and progressive Boulder, CO. Johnson, a senior living provider veteran of 30 plus years, says his campus residents may demographically resemble the Silent Generation of seniors, but they behave a lot more like Baby Boomers.

> **"[Today's residents] are outspoken and have a lot to say. They don't just want updates; they want input from the start."**

"They are outspoken and have a lot to say. They don't just want updates; they want input from the start." And they want to exert their voice in other ways—by sharing feedback, having the administration address the issues they raise in a sincere and timely fashion, and having decisions on campus made in a transparent and open manner. On some campuses, voice expectations are even greater, extending to areas of governance. The National Continuing Care Residents Association, an advocacy group for Life Plan Community residents across the country, recommends in its Resident Bill of Rights that three spots on the corporate board of directors be selected and appointed by residents, and it holds that those three board members should have rights and duties commensurate with the rest of the board members. Residents have also expressed that their own Resident Associations aren't as effective as they would like them to be. According to the Holleran database, the largest of its kind in the field, resident councils score a 3.99 (on a 5 point scale) for effectiveness. This is one of the lower-scoring items on the Holleran resident surveys.

Creating a culture where residents can experience their voice being heard involves consistent two-way, transparent communication. Residents today want to be informed about decisions that affect their lives and they want to be involved in that decision-making process. Campus administrators must create a variety of opportunities such as focus groups, one-on-one dialogue sessions, open forums, resident council meetings, resident surveys and suggestion feedback mechanisms. These opportunities allow for routine and sincere response to concerns, issues, and fears that are on the minds of residents.

Transparency can be a delicate issue in some situations, and administrators must handle this with care. It is difficult to explain the termination of employees who may be popular with residents, yet are not productive or contributing their fair share. Confidential matters regarding residents are likely to be especially challenging. Thoughtful consideration of what to share and when to share must be given, and unfortunately, many issues require a special level of discernment. The key to *Voice* is to strike the delicate balance between residents' autonomy and the overall needs of the campus.

### CONNECTION DOMAIN—ENGAGEMENT WITH THE OTHERS

The Connection domain correlates directly to the middle rung on the Hierarchy Model—belonging needs. Social connection is a fundamental need among all individuals, but it may be particularly important for older adults as they are likely to have lost close friends and family members. Qualitative studies show that older adults rate social engagement as more important than physical health status as a sign of successful aging (Reichstadt, Sengupta, Depp, Palinkas, & Jeste, 2010; Von Faber et al., 2001). Several studies demonstrate that engaging in social activities, having regular contact with social ties, and having a strong social support network are all associated with reducing cognitive and physical decline among older adults (Glei et al., 2005; Holtzman et al., 2004). Life Plan Communities are an ideal environment to foster meaningful social connections and to combat the social isolation that often comes with aging.

Many residents select Life Plan Communities as their retirement choice because these communities provide the ideal environment to foster social interaction with others. That sense of belonging can be facilitated by creating a welcoming environment that allows each resident to be as socially active as they would like to be. Encouraging social interaction among residents through activities, events, and dining experiences is important.

Residents thrive in an environment where rich connections are established, not only with other residents, but with staff members as well. On many campuses, staff become an extension of the resident's family, and this bond is especially important. How campus administrators view this potential for staff-resident interaction is critical. If there is a policy of formal-only interaction between staff and residents, a missed opportunity may exist. Both residents and staff can benefit from friendships—staff who feel bonded to residents are less likely to leave and seek employment elsewhere, while residents are more likely to come out of their apartments if it provides an opportunity to interact with staff who they look forward to seeing each day.

Another dimension of connection is feeling accepted. Those residents who feel ostracized on campus, due to non-traditional lifestyle choices or disabilities that make others uncomfortable, will not feel a sense of belonging unless there is a sincere effort to include them and allow them to be accepted. On many campuses, there are tensions during meal times, whereby residents form cliques and tacitly exclude some residents from joining their tables. Sub-cultures are created and residents feel like they are on the outside looking in.

Campuses that educate residents and foster an atmosphere of inclusiveness are less likely to see these subcultures develop. Instead of allowing such exclusionary behavior

to take place, it is imperative that campus leaders proactively manage situations and send a clear message that certain behaviors are not tolerated.

### WELL-BEING DOMAIN—ENGAGEMENT WITH HEALTH AND WELLNESS

While self-actualization needs can be addressed at any point in one's aging, it becomes particularly important in the last third of our lives. Personal growth is greatly enhanced when health and wellness are met. Well-being isn't just a basic need; rather, it's fundamentally woven into the other three domains of engagement. Well-being does not refer only to physical health and cognitive functioning—it's about wellness of the whole person—physical, mental, social, spiritual, etc. Supporting residents in the aging process by offering appropriate resources to help them adapt to changing circumstances in their lives is a critical part of creating a wellness culture on campus.

Baby Boomers, in particular, expect this type of support in the form of wellness coaching, state of the art exercise centers and pools, saunas, spas, and yoga and other modern fitness classes. They have become accustomed to these amenities in their lives and will reject campuses that don't offer them. Many campuses are seeking to differentiate themselves by offering the most advanced features. These include programs such as those presented by Masterpiece Living and Vitality 360, where personal lifestyle inventories assess how often residents interact with others, laugh and sleep well. Identification of goals that each resident wishes to achieve in order to help them age more successfully is an important component of such programming. In addition, behavioral therapists and psychotherapists on campus are increasingly more typical in recognition of wellness and well-being becoming more than just the physical dimension of aging.

Mather Lifeways in Evanston, IL is collaborating with the University of Arizona on a project called "Thrive", which brings together the expertise of school educators, gerontologists and industry leaders to adapt existing notable programs from other fields to meet the unique needs of older adults, thereby allowing for implementation of varied and sustainable programs for resident engagement and wellness. Christian Living Communities based in Colorado is leading the way with an initiative focused on creating dementia-friendly communities on their campuses and beyond their walls.

### FULFILLMENT DOMAIN—ENGAGEMENT WITH LIFE GOALS

Cognitive needs such as knowledge and exploration, as well as, a need for meaning and expression of creativity, are found on the upper section of the Hierarchy of Needs and are addressed under the *Fulfillment* domain of the Holleran Resident Engagement survey.

Residents seek a sense of purpose in their lives, in whichever way that may be defined for them individually. Experiencing a sense of purpose is associated with less disability (Boyle, Buchman, Barnes, & Bennet, 2010) and lower mortality rates (Hill & Turiano, 2014). This purpose becomes particularly important for aging individuals, as older adults often lose many important social roles (e.g., worker, daughter/son, etc.), due to retirement and loss of friends and family members (Evandrou & Glaser, 2004). The manifestation of purpose can be as basic as having a responsibility to take care of a pet, or as involved as organizing and leading a strategic planning process on behalf of a campus. Each resident seeks self-actualization in different ways, and therefore should have the chance to express self-fulfillment in his or her own unique manner. Although not commonplace, today on most campuses, having a coach and personal life plan for each resident who desires one will become more typical in the near future. While skilled nursing residents have "care" plans that outline how health issues will be addressed, independent living residents should have the option of creating "life" plans for themselves, with the help of trained life coaches. Defining what constitutes "living the life I want to lead" is part of this process, extending beyond the more familiar "bucket list"—an expression that many find outdated and even offensive.

An important aspect of older adults' well-being is continuity between their lives prior to moving onto the campus and now (Scharlach & Lehning, 2016). Though circumstances often change, values, goals and personality change little as a person ages (Kaufman, 1986; McCrae & Costa, 1990). A successful Life Plan Community is one which reduces barriers so that older adults can continue the pursuit of their personal *Fulfillment.*

## THE FUTURE OF RESIDENT ENGAGEMENT

Successful aging—a term used widely but with no consensus definition—should be front and center in the strategic mindset of every Life Plan Community. While many Boomers will choose alternative models and may decide to "age in place" in their own homes or in Naturally Occurring Retirement Communities (NORCs), many others are seeking the security of a campus where they are able to flourish and achieve their full potential. That is why the adoption of a "culture of engagement" is so essential in today's marketplace.

Holleran researchers have reviewed a wealth of literature around the topic of successful aging, finding that the four domains of *Voice, Connection, Well-Being* and *Fulfillment* are associated with a variety of important outcomes for residents and for senior living communities, including:

- minimizing disease and mortality
- reducing risk and accidents
- slowing cognitive and physical impairment
- increasing life satisfaction

As the understanding of successful aging grows, so too do the expectations of the aging populations. Consumers today expect more than they have in the past from Life Plan Communities. No longer are their expectations limited to good food, clean and well maintained apartments, and a safe environment. Focus group research conducted by Holleran at Life Plan Communities around the country have revealed that the demographic and psychographic profile of residents is changing, and with that change comes a different level of expectation.

Life Plan Communities that position themselves as places where successful aging happens, with attention to the Resident Engagement domains of *Voice, Connection, Well-Being* and *Fulfillment*, have the greatest likelihood of attracting vibrant people to populate their campuses.

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