

# Inspiring wellness across the organization



**Report from the ICAA Forum 2015  
at ICAA Conference**

Hosted by International Council on  
Active Aging

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# Creating the future at the ICAA Forum

The ICAA Forum brings together thought leaders from many senior living organizations to form a think tank that develops strategies to turn challenges into opportunities. Launched in 2005, the meetings forge connections among industry leaders while promoting understanding and cohesive action around the ultimate goal: improving or maintaining good health and quality of life as people age.

Communities targeting older adults—CCRCs and lifecare, properties with independent and/or assisted living and 50+ real estate developments—have been among the first organizations to grasp the value of active aging, which promotes the vision of all individuals—regardless of age, socioeconomic status or health—fully engaging in life. Over the years, these communities have evolved their “lifestyle” offerings to embrace the dimensions of wellness: emotional, environmental, intellectual/cognitive, physical, professional/vocational, social and spiritual.

Because senior living organizations must balance resident well-being with operational objectives, their challenges reflect those faced by many organizations in the active-aging field, whether their location is a planned community or a community center. By the same token, their successes and strategies are models of best practice.

The ideas generated during ICAA Forum meetings have resulted in tangible resources that everyone in the industry can use to move forward. Among them are the ICAA/ProMatura Wellness Benchmarks that link lifestyle and wellness programs to the business

objectives of a community; the Career Path for Wellness Professionals and Salary & Benefits Surveys, white papers including “Strategies that create an environment for wellness” and “Strategies for bringing wellness to people with cognitive decline.” The Rebranding Aging initiative was born in these meetings, resulting in the “Changing the Way We Age” campaign featuring older adult Champions as role models and advocates.

The ICAA Forum meets twice a year. The Spring meeting is held in the Washington, DC, area and the Fall meeting at the ICAA Conference. Visit <http://www.icaa.cc/conferenceandevents/forums.htm>

## **Host:**

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# A vision of wellness culture

“Wellness” is a multidimensional concept that frames the philosophy and activities that promote the physical, social, intellectual, spiritual, emotional, environmental and/or vocational health and well-being of older adults. Most of you reading this document share the belief that the dimensions of wellness are a framework that is good for the older adults you work with, and good for the organization. Many of you, along with ICAA, have given thought to integrating wellness across the organization, and have produced materials to do that. Yet, there are still challenges.

To discuss the challenges of creating a wellness culture, and form strategies to overcome the barriers, senior leaders and experienced professionals joined together at the ICAA Forum at Active Aging Conference 2015. Participants represented retirement communities, government agencies, academia and industry service providers, which offered a rich blend of perspectives.

The members of the Forum think tank addressed three questions:

1. What would it look like if wellness culture was pervasive across an organization and the community?
2. How do we get what we need to reach that vision?
3. What steps do we need to get that result?

By reverse engineering the ideal scenario for wellness, Forum participants identified the factors that enable organizations to incorporate wellness across their values and operations. While doing so, several themes emerged:

- Education, the need to educate all stakeholders on the benefits of wellness, and why it impacts them personally and professionally.

- Organizational commitment, buy-in from all levels of authority and all members of staff, regardless of role or department.
- Engagement, bringing together everyone involved, listening to them, and operating on an industrywide level.

The rapid-fire visioning of the future when a wellness culture is firmly in place led to strategic areas and suggestions that could be implemented by many types of organizations dedicated to the philosophies of active aging and wellness.

## A vision of the future

*If we achieve all the things we always speak about, what would your ideal community look like? How would the ideal wellness culture impact your community?*

With the wellness culture in place, we have removed the gates in age-restricted communities and brought the wellness culture into the larger community. All the generations are active and mix together, benefiting kids, grandkids, families and caregivers alike. This inclusive culture has minimized ageism and stigmas around functional impairments (physical, cognitive and social). The developmentally disabled are welcomed and included throughout the community.

Now that wellness is pervasive in the larger community, people are healthier and less fearful that as they get older they will have to move away from the community they love. Everyone is walking upright and there are few assistive devices needed. People who do need assistance use devices designed to help them walk, such as exoskeletons. Everyone is fueled by good nutrition, feeding the body as well as the mind.

In the larger community there is a culture of elders being elders, taking the focus away from care and moving it to living well. Those who move into retirement



communities (a name that will likely change) are younger than in the past because of the lifestyle that is offered. At the same time, the 80 and 90 year olds who live there are embraced. Staff members are proud to serve them with a culture that supports their changing expectations. The wellness culture has replaced the “care” model and made “care” part of the approach to maintaining quality of life.

**Customer engagement.** Each person’s experience is that she or he is living with purpose. There is 100% engagement in all wellness areas, and active participation in programs that have meaning for each individual. Retirement is a Four Seasons [luxury hotel] experience.

**Staffing.** The wellness culture is everywhere, and no longer the role of a single person or department. Communication is valued throughout an organization, and as a result, the components of wellness are shared equally and there are no territorial battles. Because wellness is everywhere, staff apply their skills and vocations within the larger community as well as in the retirement community, bringing their expertise to more

people. Roles that were focused on building diversity in an organization are no longer needed.

Organizations focus on staff member’s well-being as much as they focus on their client’s well-being. Team members are fully engaged in the wellness culture, and on their jobs. There is little turnover since team members stay longer, and few sick days. Staff no longer see providing care and services as a list of tasks to be completed. They focus on care and well-being, rather than on “I’m doing this for a paycheck.”

Relationships between caregivers and older adults have improved, so there is more time for emotional connections while providing high levels of service. The culture has shifted to a strengths-based approach and focus—what we do well as opposed to exerting all energy on what we do wrong.

The culture is enhanced because staff and physicians are well-equipped to implement a wellness vision. Medical schools, colleges and vocational schools have agreed that a wellness curriculum is important.

These institutions have stopped being territorial and approved crossover training and a set of core values. Professionals from all disciplines work as a team.

**Impact.** An overriding impact of achieving a wellness vision is the dramatic drop in the cost of healthcare, freeing these funds for older adults to spend on doing things that are valued, which in turn bring more life satisfaction and more life engagement.

In addition, the operational measures at organizations have improved. The financial impact has transformed

organizations because they spend less money on taking care of people who are unwell and have more money to spend on people who are staying well for a longer period of time. This has created a very positive cycle, enabling increased lengths of stay.

The desire of older adults to move into a retirement community is so great, marketing has changed to spread the message of the wellness culture rather than emphasizing care.

## Thoughts about implementing wellness

- “The word wellness has been used in many ways, from lifestyle services to shampoos and dog food. This lack of integrity is a barrier for acceptance by some in the professional community, and it can also create a challenge with funders. As wellness is not consistently defined, the expectation for outcomes is ill-defined. By creating a definition that is embraced and utilized industrywide (current terminology: wellness, real wellness, holistic wellness, whole-person wellness), we can produce research-based outcomes for funders and the population-at-large. This is similar to evidence-based fitness programs that are funded and accepted by government, public and private institutions.”
- “We can come up with an industry definition of wellness, but our clientele is an average age of 80 and 90. Wellness is a new word to them. We can bring out a definition of wellness, but is that really how they are interpreting that word?”
- “Wellness should be the core of family values because that’s where it all starts, and if we can influence people of all ages, then we can influence society.”
- “I think it starts with the family and the values they’ve been brought up with, but if you want to be a facilitator for paradigm change, really move things faster from what we’ve seen recently, you need to have people who are predominantly in the media join in. They need to do something dramatic that changes the mindset. You’ve seen recently how certain things in society that weren’t acceptable a few years ago—and those things are big paradigm changes—are now being talked about with big media coverage. When we see the president or a prominent actor who is stating their age, it’s pretty big and bringing attention to aging. They could also be talking about wellness.”
- “If there were a stronger culture of health within government agencies, it would trickle down through other aspects of American society and industry. Everyone knows they are getting older and that they will eventually live in situations different than their current situation, but folks don’t necessarily plan for their health in that future scenario. There’s a lot that private industry has to be on the forefront of, and I would love to see that culture permeate housing, healthcare ... there’s a lot of work to do ....”

# Action items to inspire wellness across the organization

With the vision of a wellness community in place, it was time to turn to implementation. Forum members broke into small groups to discuss what is needed to turn the vision into a reality.

Theme: Education	
<i>How do we get what we need?</i>	<i>What steps do we need to take to get that result?</i>
Educate about the value of wellness; change mindsets.	Start with younger people in the larger community to teach them about the importance of wellness; make older adults the presenters. Reach out to family members, students and student doctors.
	Use marketing techniques to form and send a message about wellness culture, both internally and externally.
	Continually educate and re-educate staff and people in the larger community.
Develop an education module to teach about wellness.	Add frequent touches to maintain motivations, such as a newsletter. Identify a motivating spokesperson. Collaborate with certification agencies to provide the incentive of a certificate.
Redefine “wellness” as a culture of well-being.	Communicate consistently among all stakeholders.
	Create the culture when onboarding and integrate into standard operating procedures.
	Redefine wellness as living in purpose; build an environment that is relationship plus purpose-centered.
Integrate the medical and well-being models.	Identify measures of accountability; reinforce accountability and understanding between departments.
Empower advocates.	Create experiences for stakeholders. Provide both formal and informal mentor opportunities.
Encourage the small change.	Encourage small changes, such as a switch to 2% milk. Clarity and simplicity are key so that people don't get overwhelmed. A series of small changes can be pooled and compared for effectiveness. Adopt the most effective changes. (References: Switch: How to Change Things When Change Is Hard by Chip and Dan Heath; and Shawn Achor of Good Think Inc.)

<b>Theme: Organizational commitment</b>	
<i>How do we get what we need?</i>	<i>What steps do we need to take to get that result?</i>
Break down silos in organizations; embrace wellness as a responsibility of all.	Bring together everyone involved in resident wellness: community, staff, family, resident. Start before person moves in. Family is engaged but resident is responsible for her or his own wellness.
	Make a wellness contract between new residents moving in and staff members with both agreeing to the terms.
	Integrate wellness with other departments so that one person is not responsible; everyone is responsible. Include in department goals. Identify the person responsible for developing and managing the wellness strategy.
Raise the level of awareness and education of the CEOs, CFOs, healthcare staff and all staff of the value of wellness.	Develop tools and resources to create buy-in from all staff. Develop clear goals and plans for change.
Engage senior level staff, their buy-in is necessary.	Acknowledge, in particular, the need for executive level buy-in, enthusiasm and leadership. Bring the CEO to wellness events and areas to see the engagement between the staff and residents, and how both groups are engaged in wellness.
Redefine Return on Investment (ROI).	Move the thinking on an organization's return from strictly a money in-money out (ROI) analysis to how the return from wellness helps the bottom line by increasing satisfaction, maintaining health and well-being.
Define outcomes for wellness that reflect the values and operational needs of the organization.	(Note, the ICAA/ProMatura Wellness Benchmarks relate wellness back to business objectives.)
Make wellness a core value.	Place wellness in organization's vision and mission; test that every initiative and process is relating back to that mission.
Obtain funding for wellness programs and cultural perspective.	Lobby financial decision-makers on how wellness returns to the organization and the larger community with potential savings for healthcare and supportive services.
	Emphasize that wellness also means adequate food, housing and supportive services; infrastructure is needed to supply these items.
	Write clear messages of what wellness is, what is needed and what wellness can deliver to activate public-private partnerships. Partner with those who also benefit from a healthier population.

<b>Theme: Engage the world</b>	
<i>How do we get what we need?</i>	<i>What steps do we need to take to get that result?</i>
Listen to many voices (“ears to the ground”).	Listen to clients’ needs, wants, and changing expectations, including on an individual level. Listen to staff and hear their needs and priorities.
	Pay attention to history—what has worked in the past and what has not. Listen to the emotional tone of healthy communities versus communities that are not as healthy.
	Create wellness committees and teams to develop programs and services, and advise on how to spread the message of wellness.
Conduct or review research that supports the value of wellness.	Develop focus groups and surveys to discover what stakeholders want and need; make these proactive versus reactive.
Engage and focus the industry on strategizing ways to build the wellness culture.	Convene an industry summit. Discover opportunities in a wellness version of a charrette (intensive planning session to design solutions).
	Organize a “task force day” throughout the industry for different groups to plan approaches to wellness culture.

# Final thoughts

Reengineering a process shows you how it was originally built, enabling you to take that information and redesign the process so you can develop a similar or better outcome. What will the outcome from the visioning exercise be? The elements needed to achieve the vision are identified, along with the steps toward fulfilling those needs. Will you and your team start moving towards a community built around wellness?

The vision of wellness culture is attainable if, as an industry, community and a country, we come together to focus on how to help people age well. Instead of telling people what they can't do because of their age, providing the environments and support that enable them to do what they are capable of allows all ages to continue to contribute to the workforce, family and the community at large, if they wish. Industry and society will benefit from the longevity dividend.

Making these and other shifts will not be easy. However, change is occurring across every industry, as the aging Boomer and GenX generations shift expectations. And change is more fulfilling when you are proactive and energetic about it, rather than being dragged kicking and screaming into it. What is evident is that demographic and cultural changes give us the opportunity to move from a medical/care model to one of prevention and well-being.

At the International Council on Active Aging we see a world of possibilities, one where the term “wellness” is used in the broadest sense as a framework for an engaged life that is filled with purpose. An engaged life is easier when homes are part of an age-friendly environment. In my vision, the community at large will offers residents a safe environment built to support social interaction with friends and neighbors, while access to services is only steps or minutes away.

The built environment will take into consideration all functional abilities. More service providers will deliver services to residents within their home.

Older adults who choose to live in a “retirement” community will do so because wellness opportunities no longer are solely found in the lifestyle/physical activity areas, but are integrated across the continuum of providers—physicians, therapists, personal trainers, caregivers, home care aides, and others—so that healthcare is a part of wellness, not a separate function. Lifestyle is the driver for the types of services that will attract older adults to age-targeted communities, while care service will be seen as a continuation of support services and not a step down.

Incorporating this approach will eliminate the negative perceptions and media surrounding the “senior living” industry. Gone will be the fear of changing residences, as communities will be viewed as the first step towards an engaged and purpose-filled life. This is what senior living and the active-aging industry is moving towards.

Working together, we can take action to achieve a better future. Won't you join us on this journey?



**Colin Milner, CEO**  
*International Council on Active Aging®*

# Tools to create the wellness culture

## Nine Principles of Active Aging

The philosophy of aging and principles to get started  
<http://www.icaa.cc/activeagingandwellness.htm>

## Plan the wellness culture

### 1. Plan the culture

*7 Key elements for developing a wellness program for older adults*

Mission, strategy, resources, team and outcomes  
<http://www.icaa.cc/business/whitepapers.htm>

### 2. Make the case

*The business case for wellness programs in retirement communities and seniors housing*

Why wellness returns costs savings and marketing power  
<http://www.icaa.cc/business/whitepapers.htm>

### 3. Form the team

*ICAA career path for wellness professionals*

Answers the “who?” question and sets a path for professional growth  
<http://www.icaa.cc/business/whitepapers.htm>

### 4. Measure results

*ICAA/ProMatura Wellness Benchmarks*

Key to providing outcomes that are significant to the organization  
<http://www.icaa.cc/business/benchmarks.htm>

### 5. Create strategies and engaging programs

*Virtual Summit: Developing High-Value Wellness*

*Programs* Planning, funding, case studies, program outcomes, marketing, six sequential webinars plus handouts, ICAA Organizational member access  
<http://www.icaa.cc/category.asp?categoryID=94&type=5>

## ICAA Forum reports

Strategies that create the environment for wellness  
Discovering the connections between brain health and wellness.

Strategies for bringing wellness to people with cognitive decline.

<http://www.icaa.cc/conferenceandevents/forums.htm>



International Council on Active Aging®  
Changing the way we age®

International Council on Active Aging has been leading, connecting and defining the active-aging industry since 2001. Founded in the belief that unifying the efforts of the organizations focused on older adults benefits both the people they reach and the organizations themselves, ICAA’s vision is shared by over 10,000 organizations. ICAA’s support of the active-aging industry includes the ICAA/ProMatura Wellness Benchmarks and Industry Research Reports, bricks-and-mortar and program development, market development, education on successful aging and whole-person wellness, networking, best practice sharing, public relations campaigns and recognition programs.

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