



Creating your blueprint for a wellness-based community

**Guidelines based on
recommendations from the
ICAA Forum, May 2019**

Published by the International
Council on Active Aging®
November 2019

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On May 8-9, 2019, more than 50 thought leaders from the senior living industry gathered in Arlington, Virginia, to advance the discussion on how the industry should move forward. Specifically, they assembled as an industrywide call to action—and to set down practical guidelines for senior living communities to follow in creating a wellness-based business model with care.

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

“ *The secret
of change is to
focus all your energy,
not on fighting the
old, but on building
the new.* **”**
Socrates

Foreword



Colin Milner

"When you're finished changing, you're finished."

Benjamin Franklin

If nothing else, life is about change.

With technology advancing at an overwhelming pace, new business models upending entire industries, and the gig economy changing altogether the concepts of workplace and workforce, businesses have been catapulted into an age of disruption.

To endure and thrive, they must adapt.

But more than that, businesses must anticipate and look for the opportunities that shifts in demographics, social norms, cultural attitudes, the competitive landscape, economies and politics bring.

In fact, experts often say that the most successful organizations are actually externally focused. They keep careful watch over the horizon, constantly scanning the external environment for societal, technological, economic and political changes that could open the door for opportunity.

Considered the greatest hockey player of all time and still the leading scorer in National Hockey League (NHL) history, Wayne Gretzky captured this concept beautifully when he said:

"A good hockey player plays where the puck is. A great hockey player skates to where the puck is going to be."

Gretzky may have been talking hockey, but in practice, the same principle holds true for the senior living industry.

We're operating in a time when aging well is the great disruptor. And if we're to remain relevant, we must anticipate and respond to the changing attitudes, needs and economic realities of our time. We must act adeptly and purposefully.

But even more to the point, we must be the drivers of change in our industry. We must be the agents and the very catalyst for that change.

Simply, we must skate to where the puck is going to be.

In *Creating your blueprint for a wellness-based community*, the International Council on Active Aging® shares guidelines to help our industry transition to new models that position our communities to score. Thank you to the participants in the ICAA Forum 2019, whose recommendations informed the guidelines that appear in these pages.

A handwritten signature in black ink, appearing to read "Colin Milner".

Colin Milner

CEO

International Council on Active Aging®

Creating your blueprint for a wellness-based community

International Council on Active Aging®

Changing the Way We Age®

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Aging well: The great disruptor

"Nowadays, if you make it to sixty-five you have a fifty percent chance you'll make it to eighty-five. Another eight thousand days! ... We're talking about rethinking, redefining one-third of adult life! ... Why don't we take that one-third and create new stories, new rituals, new mythologies for people as they age?"

Joseph Coughlin, founder and director of the Massachusetts Institute of Technology AgeLab, from *The New Yorker*, "Can We Live Longer But Stay Younger?" (Gopnik, May 13, 2019)

The ICAA Forum 2019 couldn't have taken place at a more opportune time. This think tank of industry leaders and experts grappled with how best to guide the industry in seizing the opportunities of change.

Inspired by the possibilities of living well at any age, efforts to redefine "old" are creating a new normal for an aging population. As baby boomers ready for a new chapter of life, they're expecting to age well. In fact, they now spend more on products and services to help them do so than they do on prescription drugs.¹

This transformation is embracing the full potential of life—driving innovations that will transform lives, industries, and your organization.

Longevity algorithms, earned health span, person-centered experiences, solo aging, bionics—these are just some examples of what is immediately on the horizon, if not already here.

Across society, efforts to advance cultures of wellness in businesses, schools and communities already have taken hold. And consumers of all ages are becoming savvier about health, wellness, and related technologies. In fact, the broadly defined wellness industry is one of the world's largest. And it's growing at almost twice the rate of the global economy.

Yet, nowhere is this transformation more prominent than in the senior living industry where traditional business models—built on care, ill-health, and dated thinking—are being reinvented. Whether an active adult community, independent or assisted living, long-term care, or a life plan/continuing care retirement community (CCRC), readying for this new normal in aging and living well is now imperative.

Where the industry stands on wellness

Over the past two decades, the industry has embraced wellness as a means to address shifting expectations and mindsets toward aging. But as the societal focus on wellness has intensified, we've also come to a tipping point—and we're well-positioned for more rapid acceleration.

In fact, ICAA research suggests that the industry is well on its way to reinventing itself—from operating on a care-based business model to one that is wellness-based, with care.

Today, more than half (59%) of senior living community staff and managers say their business model will be wellness-based, with care, by 2023—according to "Visions of the Future," ICAA's 2018 Active-Aging Industry Trends Survey.²

The fact is this: As an industry, we're on the brink of a watershed moment. How we move forward from here will dictate our future and that of the people and families who depend on the services we offer.

ICAA's think tank focused on what to recommend to help organizations and communities move forward expeditiously and transition to a wellness-based model with care. Based on the insights and input of this diverse group, who represented settings across the spectrum of senior living, the following guidelines suggest a comprehensive blueprint for action.

What is wellness?

While the definition of wellness continues to expand and evolve, ICAA defines it as follows:

Wellness is derived from our ability to understand, accept and act upon our capacity to lead a purpose-filled and engaged life. In doing so, we can embrace our potential (physical, emotional, spiritual, intellectual, social, environmental, vocational) to pursue and optimize life's possibilities.



Making the most of these guidelines

The senior living industry is comprised of many different types of communities. Each is at a different point in its transition to the wellness-based model, and each faces its own brand of challenges. But the shift to the wellness model is an ongoing transformation. And how we define wellness will continue to evolve as more science emerges and as societal values around what constitutes quality-of-life advances.

Regardless of where things stand within any individual organization, these guidelines will help communities identify the various elements they'll need to consider as they steer their organizations closer to a wellness-based model.

ICAA recommends you:

- 1) Create a wellness team of individuals who are 100% sold on wellness to start the journey together.
- 2) Use these guidelines to discuss, research, draw up, and implement a comprehensive blueprint along with goal-specific strategies for embracing wellness and moving to a wellness-based business model.
- 3) Ensure that all planning and implementation remain focused on a vision for today—and for the future.
- 4) Revisit these guidelines routinely as you continue to assess your strategies and fully implement your blueprint.

Wellness: The new normal in senior living

Wellness is no longer just a “nice to have.” It’s the new normal for senior living.

In the next five years, 59% of senior living communities will be based on a wellness lifestyle model with options for care, according to ICAA’s 2018 Active-Aging Industry Trends Survey. The remaining 41% believe their communities will be based on a care model but will still provide offerings for a wellness lifestyle. In short, 100% of the survey respondents say they’ll be adopting and implementing wellness in their communities.²

Yet, there's a distinct difference between the two models cited above. One remains based on health care. It looks at peoples' challenges and limitations. The other seeks to reimagine the industry. This new model embraces individuals' potential, regardless of capability or age, creating wellness-based communities that offer care as a service. But **in the wellness-based model, the care that is offered doesn't define the community—wellness and living to one's full potential do.**

Today, 64% of leaders in the industry view wellness as a “must-have” across all dimensions.^{2,3} Moreover, wellness concepts are a priority in current planning for 84% of leaders whose organizations have acted to implement a wellness culture over the last two years (2017-2018), while 72% include wellness concepts in future planning for the next few years (2017-2020).³

But why? What is the value of implementing a culture of wellness? And what outcomes have been realized?

Whether on-site or in the community at large, wellness broadens the client base for senior living. And as changes in demographics and attitudes among the aging population create new realities, they also present new opportunities. Shifting to a wellness-based business model provides the platform from which to leverage those opportunities.

Whether you decide to reposition your community in the public eye, shift your resident base from assisted to independent living, gain broader appeal among the next generation of residents, reshape perceptions of aging and senior living, or take a person-centered approach to resident well-being, this document outlines many opportunities on which you can act.

In the 2019 ICAA State of Wellness Survey, 305 senior living communities answered these questions.³

Value of wellness ³	
<i>In your opinion, what is or would be the value to your organization of implementing a culture of wellness? The culture would include services, programs, and environments that emphasize the dimensions of wellness: emotional, environmental, cognitive/intellectual, physical, social, spiritual and vocational.</i>	
Health and well-being of older adults would improve	93%
Staying relevant in a changing industry	71%
Participants and residents want it	61%
Can better compete against similar organizations	52%
Attracting younger adults	48%
Wellness programs bring in money	27%
Not sure/other	5%

Wellness outcomes ³	
<i>Considering the wellness initiatives that have been implemented in your organization, what outcomes have been realized?</i>	
Participation in wellness activities has increased	72%
Participants feel their health is maintained or improved	70%
Participants feel they have a high quality of life because of wellness choices	68%
Participants are satisfied with the wellness program	62%
In senior living, residents stay longer in independent living	60%
People move into a property because of the wellness opportunities	56%
Staff believe the workplace atmosphere has improved	31%

Creating your blueprint

Each senior living community is different. And each will have its own unique blueprint for change. But having a blueprint is essential. Not only does it give structure to thinking things through holistically, but it gives leaders and staff a more comprehensive view of their roles and how all departments and efforts interconnect. Moreover, creating a blueprint generates important conversations and helps organizations set milestones and implementation timelines.

The following steps are intended to provide a general guide to help communities create the tailored blueprints they'll need to move themselves—and the industry—forward as the wellness-based model becomes increasingly important to our businesses and society as a whole.

Six essential steps to creating your blueprint

Step 1.	Step 2.	Step 3.	Step 4.	Step 5.	Step 6.
Commit to a wellness-based community model, with care.	Rethink aging, wellness, and senior living.	Conduct a wellness audit.	Design your wellness model.	Implement and promote your new wellness model and strategy.	Evaluate, adjust, reevaluate.

■ Step 1: Commit to a wellness community model, with care

Your organization's transformation starts with one simple question:

Are you willing to shatter the status quo?

If the answer is yes, then buy-in of the transformation effort is essential to your success. Your organization and its leaders will need to embrace the opportunities that change and new, divergent ideas bring. And they'll need to nurture true diversity in all its manifestations—diversity of people, strengths, backgrounds, knowledge, ideas, and skill sets.

In short, your organization and its leadership will need to reimagine the business model and make meaningful changes—despite past practices or what others continue to do.

To help you in these efforts, ICAA has identified the following drivers that will enable senior living communities to lead the change.

1. A clear vision

A clear, compelling, powerful vision is everything. Organizations will need to envision and clearly communicate the kind of community they want to be. That vision will need to draw people in and inspire them to take action, overcome obstacles and achieve lasting change. Importantly, it will need to spotlight how a culture of wellness and a wellness-based business model will benefit both residents and staff. Above all, the vision will need to be centered around a broad, multidimensional view of wellness.

2. New purpose

An overriding, new sense of purpose that encompasses wellness should be built into the corporate culture and work ethic. It's this new purpose that will steer all efforts. And it's this new sense of purpose that will unite people within the organization and give them something inspiring to work toward.

In many ways, this new purpose defines the corporate culture, which includes the values, beliefs and behaviors that guide it. Together, these shape how management and workers engage with one another as well as with residents and their families.

According to the Society for Human Resources Management (SHRM), the most successful organizations have a strong culture where there's agreement on priorities and values, with leaders who are clear on how the cultural values direct the organization's operations.⁴

3. Engaged leadership

Committed, engaged leadership is essential. The C-suite and top management set the tone. Only they can make the promotion of a culture of wellness an organizational priority. Importantly, organization leadership will need to routinely and effectively communicate with all levels of staff so there's no disconnect between top management and the workers who interact with the residents and keep the community running.

Creating your blueprint

Step 1 continued

4. A shared mission and ownership

The task of shifting to a wellness-based model will need to be shared by all stakeholders. All levels of staff will need to own the mission and feel a sense of purpose in advancing it. In fact, McKinsey research shows that when you include employees across all levels of the organization in the change process, success jumps up dramatically.⁵

5. An outward focus

An outward, collaborative focus that leverages the broader community and all generations is ideal. Local communities offer many different resources and opportunities for collaboration. Moreover, an outward focus opens the door to new solutions to issues such as loneliness and isolation. For instance, one public opinion poll found that 92% of Americans believe that intergenerational activities can help

reduce loneliness across all ages; 94% agree that older people have skills and talents that can help address a child's/youth's needs; and 89% believe children and youth have talents and skills that can help address the needs of our nation's elders.⁶

6. Empathy in action

Identifying and understanding the viewpoints of residents, their families and the staff who provide services day in and day out is a key element for successful transformation. After all, any change initiative rests on one thing: people. Empathy in action helps the organization anticipate and better serve the needs and desires of residents. But it also helps management better anticipate, understand, and reduce any resistance to the change effort.

Once your community commits to a wellness model and the drivers of transformation, the next step is to rethink aging, wellness, and senior living.



Step 2: Rethink aging, wellness, and senior living

"A new model is challenged from the outset when it's implemented with dated thinking."

Colin Milner, CEO, International Council on Active Aging

Driven by science and media—and embraced by those seeking to live a better, healthier, longer life—new definitions of aging are helping to reframe what it means to be older. Yet, the greatest barrier to creating a better, longer life is how we currently conceive old age, according to Joseph F. Coughlin, director of the Massachusetts Institute of Technology AgeLab.⁷

"Frankly put, our concept of old age is made up," Coughlin says. "It is basically a social construct that originated around 100–150 years ago. The made-up notion of old age, as presented through products and marketing, tells us that it's a time to retire, to withdraw, to stop. But it's not... it's actually an entire life stage that has yet to be invented." And, to invent it, we need to look at old age differently.⁷

Like Coughlin, Sarah Harper, founding director of Oxford Institute of Population Ageing, believes that "old" should be reserved for those who are frail, in ill-health, and are towards the end of life. For everyone else, Harper sees the emergence of a new life stage—one she calls "active adulthood."⁸

This new thinking is driving the aging well movement. Not only is aging well giving birth to new industries, but it's also driving existing ones to reimagine their business models and offerings—as is happening within senior living.

Yet, tapping into the aging well opportunity will require current perceptions of aging—including those held by staff, residents and their families, suppliers, and investors—to focus on what residents *can* do, instead of on their limitations.

Changing mindsets—a new day

It's abundantly clear that for the industry to shift to the wellness-based model, with care, it will require us to change perceptions of what it means to age. More specifically, we need to rethink what it means to age well and look to the industry as a key driver of wellness.

ICAA recommends that your organization take the following steps to accelerate a change in perceptions:

- 1. Begin the conversation:** Gather your staff, residents and their families, along with suppliers and local experts, to discuss what mindsets need to change and how you can make that happen.
- 2. Define wellness:** The focus of wellness is on the creation of health and well-being, not on ill-health and health care. If you haven't already, define wellness for your organization.
- 3. Create a wellness mission:** Explore how to update your mission and vision statements to embrace this new thinking and your new model. Take your time during this process, as these will guide everything you do moving forward.
- 4. Make education a foundational pillar:** Changing misinformed perceptions or dated thinking about aging and senior living will require an ongoing effort to educate. In fact, it's difficult to change mindsets without education. This is compounded by the fact that health literacy is low among the older population.⁹

Creating your blueprint

Step 2 *continued*

ICAA recommends that you start with your staff, residents and their families, along with suppliers. Take the time to inform them of your new direction, educating them on why you made the decision and the benefits of a wellness-focused community. Discuss how they'll play a role in the success of your new model.

Education will be especially important in fighting ageism—which is becoming increasingly urgent as life expectancy goes up, birth rates go down, and the median age of entire countries increases.

Not only does ageism harm individuals, but it harms society. In an article published in the Fall 2015 issue of *Generations*, the journal of the American Society on Aging, Laura A. Robbins summed it up well: “Perceptions about older adults constrain the types of roles they assume in the community, limiting them as individuals and preventing communities from gaining the wealth of knowledge, wisdom, and energy from what some call our fastest growing natural resource (Greenya and Golin, 2008).”^{10a,b}

From shortening life spans to squandering valuable human potential, ageism has no place in wellness-based communities.

5. Recognize the importance of baby-boomer

perceptions: Leading-edge baby boomers are still 10 years away from moving into most communities, based on current models and age of entry—with

the possible exception of active adult communities. Changing your model changes your appeal to a market segment that is seeking experiences and residential settings that offer them the lifestyle they desire. And don't forget that wellness real estate commands a 10-25% premium on sale price.¹¹ Remember, as well, that it isn't just baby boomers who are seeking fulfilling experiences and a healthier life. This approach to community culture appeals to all generations.

6. Focus on function, not age: The media is filled with stories of older adults doing things once considered just for the young—because the fact is, it's not about age. It's about function. We're seeing greater numbers of active adults embracing their newfound potential. Take a close look at your marketing, spaces, policies, programs, and products, and either eliminate or redirect those that focus on age. Instead, structure them around capabilities and aspirations.

7. Create a judgment-free environment: Don't define people by their hardships. That isn't how they define themselves. Provide opportunities for residents, guests, and staff to make the most of their abilities and situations. At the same time,

demonstrate ways to compensate for change and loss relative to all aspects of life, including spouse, family, cardio capacity, strength, financials, hearing, and vision.

- 8. Make the invisible visible:** Once a clear vision and educational foundation have been established, your community can put a concentrated public relations effort in place to further change perceptions. The goal is to give voice to residents and their families, as older people often aren't heard or seen in marketing efforts. And, too often, when they are seen, they're mostly viewed through a lens of diminished capacity, ill-health, and as a burden to family and society. An important goal of your public relations effort should be to change that.

The bottom line

Changing perceptions is perhaps the most challenging of any kind of change. This is largely because the way societies view things can become entrenched over the years. But new ideas and new ways of looking at things can and do change perceptions. And with the influx of the aging baby-boomer population—a savvy-consumer generation that doesn't acquiesce to the status quo—the opportunities for reimagining aging and the industry are boundless.

But before you leap ahead, first stop and assess the current wellness situation in your community. This step is essential for your success.

More to consider:

- Create a guiding vision and new sense of purpose
- Align protocols, policies, and programs with that vision
- Reframe the work you do
- Exercise empathy to understand the reasons for existing perceptions
- Conduct outreach and strengthen relationships within the broader local community



Creating your blueprint

Step 3: Conduct a wellness audit

Where are you now? A communitywide wellness audit will enable you to determine the current state of wellness in your community. Establishing a baseline for wellness will enable your organization to effectively embrace the opportunities that this new paradigm offers.

Not very different from a SWOT analysis, a wellness audit will require a thorough assessment of the strengths, weaknesses, opportunities, and threats unique to your organization in making the paradigm shift. As part of the process, you'll need to look at:

- your organization's philosophy and/or mission
- its short- and long-term vision
- the state of your current wellness culture—if one exists
- your site plan, program space, and equipment
- input from staff, residents, and their families
- trends in the marketplace—both locally and industrywide—and how your organization compares

An important, more discerning part of the audit will be learning what your organization's board and management think. What's their vision? Are they stuck in the disease-management model? Will they consider a new paradigm? These all are questions to consider.

Many communities produce a master plan—that is, a comprehensive study projecting growth and development of a campus five to 20 years out. If the plan is current, the wellness audit should consider it and integrate what's relevant. Your organization may need to address critical elements such as timing, financing, market conditions, and design issues.

To more easily sift through all the data gathered for the wellness audit, ICAA recommends that you break it down into several subsets, listing observations, recommendations, and industry insights for each topic assessed. ICAA recommends that you then distribute it to all stakeholders for review, keeping in mind that prioritizing the recommendations will be critical.

Throughout the process, keep in mind that wellness outcomes are important for demonstrating business value, counteracting ageist assumptions, and establishing a competitive advantage.

In fact, ICAA research shows a growing trend in organizations tracking wellness program outcomes, with 44% of survey respondents planning to track participation and outcomes, and 40% saying they'll be purchasing software to do so.¹²

The information you gather from your wellness audit will be invaluable in helping you determine when and where to make minor modifications—and when and where to implement significant changes, using the guidance offered in this document.

The bottom line

Wherever things currently stand within your community, shifting to a wellness-based business model will require commitment to operational excellence from your community's topmost leaders, a willingness to let go of old ways of viewing residents and their needs, receptiveness to new ways of addressing those needs, and adopting a broader view of health and wellness.

More to consider:

- Continually communicate the new vision
- Take a holistic approach
- Listen to and understand the needs and interests of residents
- Set up a strong and nimble infrastructure
- Groom leaders at all levels
- Eliminate practices, policies, and programs that don't fit the new model
- Focus on key capabilities
- Raise awareness of the wellness-based model and its benefits within the marketplace
- Strengthen broader community relationships
- Measure and benchmark performance
- Establish effective hiring and training practices
- Address change resistance and other barriers to the paradigm shift

Step 4: Design your wellness model

With the results of your wellness audit in hand, you're now equipped with the information needed to design the wellness model that will best serve your community. ICAA recommends that organizations take the following actions as they move through the design process. Each action item will help your organization optimally leverage the opportunities that wellness presents.

Action item #1:

Create a person-centered approach to all aspects of your community.

Action item #2:

Follow the six essential principles for wellness programs:

- Embrace a positive focus
- Adopt an integrated approach
- Address the 24-hour activity cycle
- Develop an engagement strategy
- Place the effort on function
- Focus on interdependence

Action item #3:

Build and educate your wellness workforce, across all departments.

Action item #4:

Implement "wellness in all policies" and "wellness for all" approaches.

Action item #5:

Reimagine your built and natural environments to support wellness.

Action item #6:

Purchase products that support a multidimensional, person-centered approach to wellness.

Action item #1: Create a person-centered approach to all aspects of your community.

An aging population brings with it many challenges and opportunities, one of the greatest being the diversity of the demographic. No two individuals age in exactly the same way or at the same rate. Health, functional capabilities, lifestyle, life experiences, living environment, culture, age, income, race, upbringing, interests, and a myriad of other life elements differ from person to person.¹³

This simple fact requires marketers, program directors, policymakers, product developers, and the designers of environments to provide choice in their offerings. It also requires them to offer personalized and/or specialized solutions and experiences.

Incorporating a multidimensional person-centered wellness model gives communities the framework for providing greater choice.

Unlike the medical model that focuses on an issue or limitation, wellness offers an integrated approach to enhancing the whole person's well-being. Still, wellness doesn't eliminate or diminish the value of medicine or care. It simply reduces or delays the need for both.

To help organizations meet residents' diverse needs, expectations, and dreams, ICAA has identified four concepts that should be incorporated into all services, programs, policies, product selections, staff trainings, and environments. These concepts provide a framework for responding to the diversity of an older population and will help organizations find new ways to assist residents in their efforts to age well.

Creating your blueprint

Step 4, Action item #1 continued

- **Person-centered wellness:** The baby-boomer generation has been and still is labeled the “Me Generation.” This fact continues to impact their decisions. Whether it’s the experiences they seek or the places they live, this group wants to be at the center of their life decisions. They want to be heard, share ideas, and seek feedback and guidance. A wellness-based community will enable residents to focus on their interests and needs, casting aside the outdated model of one size fits all.
- **Precision-wellness solutions:** With precision wellness, medicine, health care, and sports science, the focus is on tailoring decisions, programs, practices and products to the specific resident. At the heart of this model is the use of technology, big data, and artificial intelligence to offer residents more targeted solutions to their specific issues or goals. Precision wellness requires a strong education component and expertise to analyze the data and make more precise recommendations. Wearables—as clothing or worn on the wrist—smart pills, and genomic profiles all are examples of tools used to support precision wellness.
- **Specialization:** As populations continue to age, addressing the diverse needs and expectations of this older cohort becomes increasingly important. Specialization will drive new lines of business—both within communities as well as within the broader geographic area. All aspects of aging well will be affected—from the physical and cognitive, to social settings, to product offerings, to environments, to programming, to policies, and more. Rock Steady Boxing and Delay the Disease by Ohio Health are two excellent examples of specialization that address Parkinson’s disease. But whatever the specifics, at the heart of specialization is the focus on meeting the needs and goals of the individual.

- **Choice:** The top addition to community environments over the past six years has been cafes, according to ICAA research. Behind this surge in cafes—and away from formal dining rooms—is the growing expectation of greater choice. In this instance, the choice concerns when residents can eat. But cafes are just one of the many ways in which organizations are providing a more diverse selection of offerings. Perhaps the most significant example is senior housing itself. Whether communal living, pocket neighborhoods, villages, dementia villages, LGBTQ communities, or wellness communities, a diverse population continues to push for a diverse array of choices.

The bottom line

A community's success depends on its ability to attract and retain residents. And this requires a focus on residents' needs and dreams. The key is to give residents choice—and voice—respecting how they wish to live to their greatest potential.

More to consider:

- Meet people where they are individually
- Better understand the individual
- Take a realistic, person-centered approach
- Promote self-empowerment, self-healing, and self-care
- Change the daily dialogue
- Continually assess and reassess

Action item #2: Follow the six essential principles for wellness programs

As your community aligns itself more fully to a wellness-based business model, enthusiasm will likely generate a seemingly endless list of potential wellness programs. But as you consider how to make the shift relative to programming, it will be important that the offerings not only be compelling, but that they be multidimensional as well. Following the framework of the seven dimensions of wellness will help ensure that they effectively meet the diverse needs, capabilities, and expectations of your residents.

Above all, as your organization shifts more completely to the wellness-based paradigm, it will be important that the programs your community offers embrace the basic principles outlined below.

Assess all seven dimensions of wellness, and build or remodel so the design of buildings, landscapes and hardscapes supports and encourages healthy lifestyles and the wellness-based paradigm.

- 94% of communities say providing lifestyle/wellness programming is an extremely or very important strategy for growing their business
- Over the last decade, there's been an increase in programs, environments, and services focused on all dimensions of wellness—a departure from the traditional focus on the physical dimension alone
- 89% of organizations added more activities, classes, or programs in 2017-2018¹²

Embrace a positive focus

Shifting to a wellness-based business model enables communities to also shift the organization mindset so it focuses on ability, as opposed to disability. The wellness-based paradigm provides communities with the chance to create a culture that is both judgement free and defined by caring—rather than “caring for.” Simply, it provides an open door for communities to encourage their residents to be who they are and live their later years to their fullest potential.

To reinforce this mindset, ICAA recommends that communities adopt selective optimization with compensation strategies. This model for active aging encourages people to recognize what they can do while accepting their challenges. They choose to leverage their current strengths and abilities, making the most of their situation—whatever that may be. At the same time, they work around—or compensate for—any losses or waning abilities. A simple example would be the individual who can no longer run but continues to exercise by walking.

Your community should guide and empower residents in making the most of their opportunities while demonstrating ways to work around change and loss across the seven dimensions of wellness.

In short, the focus moves more intently to creating health, with less emphasis on managing disease.

Adopt an integrated approach

Wellness is not singular by nature, as all seven dimensions are interwoven. Wellness programs and environments provide your community with the chance to have an impact on the whole person in various ways, depending on their needs and passions.

Cognitive function, for example, is affected by social connections, physical activity, sleep, medications, and other elements. If a resident doesn't want to do brain fitness exercises, that individual can still gain better cognitive function by participating in other wellness offerings, such as social clubs, book clubs, and exercise classes.

Creating your blueprint

Step 4, Action item #2 continued

Walking is another prime example of a single program that covers multiple dimensions of wellness. Walking is part of the physical dimension. Yet, with a group, it now incorporates the social dimension. Done in a majestic setting, walking also can enhance the spiritual and emotional dimensions of wellness. Further still, if there's an educational component to the walk, the intellectual dimension will be fed. Be sure to consider all the dimensions of wellness in each activity, program, or setting. And take into account how they support the whole person—intentionally and unintentionally.

It's important to note, as well, that the physical dimension of wellness is a very large category. People tend to associate it with physical activity, which is an important element. But this dimension also includes nutrition, health care, self-care (such as managing diabetes with diet and exercise, or a massage to relieve sore muscles or stress), adequate sleep, exercise, maintaining a healthy weight, limiting tobacco and alcohol, using safety precautions, and more.

This type of integrated, inclusive approach builds wellness into all programs and across all departments for all residents, providing seamless support for wellness across the full spectrum of services.

Address the 24-hour activity cycle

Residents' wellness is affected 24 hours a day, every day. So in addition to formal programming, communities shifting to a wellness-based business model also will need to offer plenty of self-directed opportunities. Self-directed options should span the full range of the seven dimensions of wellness—from sleep environments for those who can't sleep in their own beds, to tranquil settings for those in need of stress reduction, to learning opportunities that exercise the mind, to outdoor gardens developed to stimulate all five senses, to exercising in a fitness center, on a sports court, or on an outdoor walking path.

Understanding what residents' lives are really like, from when they wake up in the morning until they go to bed at night, is essential to fulfilling this strategy. Importantly, self-directed technologies that provide lifestyle monitoring—like wearables—will help inform recommendations for lifestyle changes, along with providing the inspiration to make them.

Develop an engagement strategy

Providing a menu of diverse activities or programs for residents is an appropriate first step in encouraging an active lifestyle. Yet, without resident engagement, the organization's efforts will fall flat, and residents won't gain the benefits of an improved quality of life. This is one of the many reasons that engagement in life is emerging as a critical indicator of healthy aging. But what is engagement?

In 2011, an ICAA work group wrote a white paper on engagement, providing the following definition:

Engagement represents a dramatic business shift from traditional programming that is typically rooted in activity theory. Getting to know an individual's life story, desires and dreams requires more time and an additional skill set for staff. For example, an engagement approach positions program and activity directors as personal life coaches. Staff roles would shift from designing and delivering large group programs to the role of 'engagement coach' with the purpose of helping each client to live the life that they chose to live. Providing programs and professionals who facilitate engagement is a more complex business model than simply offering older clients things to do.¹⁴

Getting people to show up at an activity isn't engagement. Participating with joy is.

Creating an engagement strategy to support programming efforts is an important aspect of shifting to a wellness-based business model. And it relies on just a few simple factors:

- Is it fun?
- Was it an experience?
- Did it put a smile on my face?
- Do I want to do it again?

Keep in mind that despite the best of intentions, too many program options can inadvertently diminish engagement—simply because there's too much to be engaged in and people are spread too thin. It may be more beneficial to offer fewer choices of a higher quality and with higher engagement.

When addressing engagement, it's also important to recognize that the world keeps telling older people what they're supposed to do. Try asking them what they want instead.

The driving force behind any successful wellness model is the individual. And at the heart of the person-centered wellness model is choice. With this in mind, the programs and services your community offers should support self-directed wellness that pays close attention to what the individual's needs and expectations are.

Many people know what they want based on past experiences. This will help drive engagement.

Place the effort on function

How the World Health Organization (WHO) defines healthy aging has moved from "the absence of disease" to the "maintenance of functional abilities."¹⁵

Why? Because many older adults are living well with chronic health issues. In fact, 69% of those with chronic conditions (ages 50-70) aren't letting these issues hold them back from doing the things they want to do.¹⁶ Yet, the loss of *function*—such as the ability to get out of bed, rise from a chair, or stand—can be life altering.

Any community shifting to the wellness-based paradigm should design all their programs with the explicit goal of delaying, restoring, managing, or improving physical, cognitive, or social function. And the effort should involve educating and training staff and residents on how to adapt a program to the individual's level of function.

Assisting residents in meeting their human potential—no matter what their situation—and realizing that to do so requires the human body and spirit to be challenged, is at the center of this approach to programming.

ICAA recommends that communities working with lower-functioning adults refer to the WHO Guidelines on Integrated Care for Older People (ICOPE), which supports a focus on function and intrinsic capacities, and offers a multitude of programming considerations.¹⁷

Focus on interdependence

For many, independence may seem like the Holy Grail. Yet, just as important to our overall well-being is interdependence.

The dictionary describes interdependence as "depending on one another."

Although the word "dependence" comes with a certain connotation within senior living, what we're talking about here is building into the community intentional and self-directed ways in which residents can connect with others. In a wellness-based business model, the culture should support the kind of interdependence wherein residents and the community as a whole enjoy opportunities to interact and provide one another with social support. Volunteering, mentoring, workout buddies, walking partners, and prayer groups all are examples of healthy interdependence within the wellness-based paradigm.

The bottom line

As 76% of communities shift their programming in order to attract and serve the incoming baby-boomer population, while serving their existing resident base, the principles for program development outlined above will be vital to success. Most important, these principles will guide your community in shifting to the wellness-based business model.¹²

Creating your blueprint

Step 4, Action item #2 continued

More to consider:

- Ask for input from your residents and staff
- Base your programs on data and survey information
- Consider incentive- and/or challenge-based programming for externally motivated residents and consider linking these programs to charity causes
- Communicate information about program availability clearly, often, and in different ways
- Explore partnership programs like SilverSneakers
- Engage residents—and staff—through recognition
- Ensure that some programs focus their appeal on forging connections with the broader, intergenerational local community
- Evaluate engagement and value to residents to consistently refine programming
- Leverage the sway of the natural wellness leaders among your residents and staff

Resource

ICAA White Paper: Key elements for developing a wellness program for older adults 2014
[iccaa.cc/listing.php?type=white_papers](http://icaa.cc/listing.php?type=white_papers)

Action item #3: Build and educate your wellness workforce across all departments

The success of a wellness model within any community rests on senior management's commitment to giving it strategic importance. But for this to happen, the CEO and executive team will need to understand what wellness is and its full potential for both the community and business.

Once senior management are fully informed and on board, the next step is to look to the wellness audit, as it's a valuable tool for developing a people strategy—whether for staff, contractors, consultants, management organizations, volunteers, residents and their families, or investors. Keep in mind, however, that this strategy needs to be created and implemented in unison with human resources. It's crucial that they're 100% on board with the organization's new vision and wellness culture.

Specific to staffing, the wellness audit should assess targeted questions, such as the following:

- What do we need to change to have a wellness community?
- Do we currently have the right staff expertise?
- Will our staffing levels and knowledge in each department need to shift?
- What new roles may need to be created?

In the next few years (2019-2021), communities intend to implement the following staffing, building toward a wellness culture:

- 50% will train staff in all departments about wellness
- 28% will hire additional staff to develop and manage wellness programs
- 28% will reorganize departments to implement wellness³

- How will we need to adjust our staff evaluations and staffing return on investment (ROI)?
- Will our recruitment policies, efforts and partners need to change?
- Will our staff compensation and expertise need rethinking?
- What staff training and educational partners will we need?
- What will career advancement look like under a wellness model?

Staffing level is a prime example of the type of staffing concerns that your organization will need to consider. The wellness audit may identify the need for additional staff for person-centered programming or precision wellness solutions. It also may allow you to outline—based on industry and community data—your wellness ROI and how your new or existing staff contribute to it.

According to the 2019 ICAA “State of Wellness” report,³ the following staffing elements are rated as the most important for a wellness culture. You’ll notice, however, a significant difference between an element’s importance and the effectiveness of its implementation. These gaping holes show areas that need focus and change.

Workforce rating of important elements for and organizational effectiveness in achieving a wellness culture ³			
Staffing elements needed for a wellness culture	Very and extremely important	Very effective and extremely effective	Gap between importance and effectiveness
Wellness programs have full-time staff	86%	66%	20%
All staff in every department support wellness	92%	34%	58%
Duties related to wellness are in job descriptions for staff in all departments	81%	37%	44%

When considering your wellness audit findings, specific outcomes will likely interest executive leadership and program managers, while anecdotes and testimonials will help inform marketing efforts and strategies for person-centered care.

Career path

Shifting to a wellness-based business model across the industry opens new career paths. And it can help clarify roles and responsibilities. But for medical and allied health professionals such as accountable care organizations to be motivated to recommend preventive and wellness services, there needs to be clarity and consistency within senior living as a whole. Only then will older adults be able to move more easily along the care and wellness continuum.

A clearly defined wellness career path will enable organizations to build job descriptions aligned with this model that are consistent across the industry in both role requirements and terminology.

Creating your blueprint

Step 4, Action item #3 continued

The term *wellness director*, for example, currently can apply to the individual who is responsible only for fitness; or for health care services and nursing; or for fitness, activities, recreation, and cultural programs.

Clarity and consistency are important for a number of reasons, including the fact that human resource departments use responsibility levels to develop job descriptions, recommend compensation levels, and plan for future staffing. But above all, clearly and consistently defined roles and career progression within the wellness-based business model allow senior leadership to prioritize wellness, making it the foundation for a broader wellness culture. This culture, in turn, empowers older adults to live as well as possible.

Develop your wellness team

Developing a dedicated wellness team will enable your community to expand its wellness reach without necessarily expanding payroll. Start with a wellness leader—an executive role. This individual will develop and prioritize a wellness strategy across all departments for an integrated approach that removes barriers to collaboration and breaks down operational silos. The wellness leader also should identify and mentor wellness leaders across all departments, among all staff, and at all levels—forming a communitywide wellness team that interacts with all residents of the community across all aspects of well-being.

Promote education

Building a clear understanding of wellness among your team members is key to competently implementing your mission. This includes building a foundational understanding of wellness into onboarding new hires—something 50% of communities plan to do between 2019 and 2022³—reskilling current staff, and conducting

team meetings. But an understanding of wellness is just the starting point. Ongoing training will show staff how they can implement wellness programs, services, and environments day to day, building it into their responsibilities. By promoting education, you support a communitywide wellness culture that drives resident quality of life and satisfaction.

With a wellness focus, onboarding, reskilling, and expanding staff's current capabilities become especially critical. Consider bringing in a different set of educational partners—such as colleges, universities, consultants, and training systems. And seek out organizations that are both knowledgeable about the older population and have extensive experience in creating wellness cultures.

How the industry educates staff also may need rethinking. According to ICAA's 2018 research, when organizations adopt new technologies, the training offered is missing the mark. Among seven types of technology training, none were rated as effective by more than 45% of respondents. Ineffective training results in ineffective staff. Given that staffing is one of the most significant ongoing investments that a community can make, this is an issue that needs solutions.²

The bottom line

It's an organization's people who will make or break a community's ability to make the shift to a wellness-based business model. Attracting good people, training them well, creating a positive work environment that offers a new sense of purpose—all built around the promotion of wellness—will yield greater results for communities overall.

More to consider:

- Emphasize the new sense of purpose within your community
- Improve work environment with an emphasis on worker well-being
- Create a positive, supportive work environment in which professional co-worker relationships are valued
- Understand why workers leave

Resources:

ICAA Career Path for Wellness Professionals
icaa.cc/careercenter.htm

ICAA Competencies for wellness managers
icaa.cc/careercenter/ICAA-Competencies-for-wellness-managers-career.html

Training:

ICAA Leadership in Wellness Management Certificate
icaa.cc/certificate/overview.htm

Action item #4: Implement “wellness in all policies” and “wellness for all” approaches

Senior living communities have a vast array of policies in place to guide their decisions—whether related to programming, marketing, product purchases, staffing, or built and virtual environments. Determining what these policies should be takes careful assessment of what the policy's impact will be, barriers to adoption, and whether the policy is quantifiable.

In shifting to a wellness-based business model, it will be important to recognize that changing human behavior is difficult. Your community's physical, social, and policy environments, and how they overlap, affect the overall culture. Together, they'll influence whether or not residents become effectively engaged in their own well-being.

By recognizing this and embracing a social-ecological model—that is, taking the impact of social, physical, and policy environments on wellness participation into account—policymakers within your organization will be more effective. All told, to support change and promote engagement, the approach to policy must focus not only on individual behavior but also on those factors that influence behavior choices.

Wellness in all policies

Although there are many similarities in policy development across the industry, each community is unique. Yet, regardless of community type, creating a wellness community requires integrating a culture of wellness into all decisions made across all sectors of the organization.

To ensure that each department takes wellness into consideration in all policymaking, ICAA encourages communities to establish a “wellness in all policies” strategy and a “wellness for all” culture. This approach provides an overriding philosophy and framework that underscore the importance of all staff and departments working together—not just the wellness department—to improve residents' overall state of well-being.

Hiring practices, for example, can include candidate screening to discover attitudes of applicants toward older adults and their abilities—and if they even view older adults as having the potential to participate in wellness.

Creating your blueprint

Step 4, Action item #4 continued

Another example is connecting public policy initiatives to programs intended to encourage active lifestyles.

An important area in which to apply “wellness in all policies” would be the built environment. This area holds great promise for improving physical activity levels in older adults. With thoughtful policymaking that encourages environmental wellness and prioritizes opportunities for physical activity, your community can foster safe, accessible environments—such as cycling and walking paths to outdoor exercise stations and meditation gardens, or to swimming pools and golf courses. Creating policies that promote well-being can effectively support the positive behavior change that the wellness-based paradigm seeks to advance.

The bottom line

Employing a “wellness in all policies” strategy and using the social-ecological model will ensure that your community’s policy decisions advance behavior changes toward wellness. At the same time, they’ll support your “wellness for all” culture.

More to consider:

- Establish HR policies that are consistent with wellness promotion
- Review and adjust internal policies to remove barriers and maximize resident wellness
- Create policies that encourage empathy, innovative ideas, and input from staff to advance a more effective wellness paradigm
- Engage and collaborate with local nonprofits and service organizations on wellness-related policy issues within the wider community

Action item #5: Reimagine your built and natural environments to support wellness

“Senior housing has a great challenge ahead of it. But, rather than just provide better housing, the industry’s strategic advantage may be to act now to envision a new lifestyle that is exciting. Something that is new and novel and beyond golf, sand and beach walks.”

Joseph F. Coughlin, director of the Massachusetts Institute of Technology AgeLab, from the *Journal on Active Aging*¹⁸

As investors, developers, builders, architects, and interior designers focus their efforts on shifting to wellness-based communities, they’ll need to explore how to build environments that lead to better health and well-being by encouraging people of all ages and physical and cognitive abilities to lead active, engaged lifestyles. Accomplishing this starts with understanding how the built environment affects residents’ health and wellness—and how it inspires them to advance their own well-being.

Clarify what well buildings and well environments are

A well building provides the environment for nourishing body, mind, and soul—whether through the building itself, or through interior or landscape design. It also is comprised of nontoxic materials, furnishings, and interior and exterior design items that enhance health. Specifically, these elements work toward ensuring clean air with good circulation, clean water, a healthy temperature, and the ability for residents to get adequate sleep—which means circadian lighting at a minimum.

Well buildings also address sustainability, energy efficiency and renewability, and recycling and waste reduction. Although not specific to the building itself, well communities also explore opportunities for providing residents with options to access locally sourced and organic food and products, and community gardening and composting. Importantly, well communities work to keep residents easily connected with nature, animals, culture, and traditions. On a broader scale, they're committed to preserving open green space and wetlands.

Needless to say, your community will need to be practical and prioritize changes over time. Energy efficiency and recycling, for example, don't cost much or require construction. Protecting wetlands within the broader neighborhood, however, takes a different kind of investment.

As you align your community even more closely to the wellness-based business model, ICAA recommends that you look to the International WELL Building Institute™ at wellcertified.com for guidance.¹⁹

Create a wellness environments map

Using multidimensional wellness as a framework, map out the entire community—from stairwells and hallways, to sidewalks and gardens—to determine how each area within the community can support one or more of the seven dimensions of wellness:

- emotional
- intellectual/cognitive
- physical
- professional/vocational
- social
- spiritual
- environmental

At the same time, determine if these settings were, or can be, intentionally designed for specific programs, or if they were intended to, or can, support self-directed wellness among residents. Consider the flexibility of these spaces to maximize their use across your diverse resident population—now and in the future.

You might repurpose a quiet room into a tranquil setting for those in search of stress management, spiritual connections, and meditation, for example. Simply address lighting; color scheme to enhance relaxation; the idea of introducing plants, water elements, and other accoutrements that induce calm; the ability to adjust temperature, fragrance, and sound environment—whether music or the sounds of nature; and room-purpose adaptability, by bringing in pillows, mats, and blankets for specific activities and uses.

Once you've created your community wellness map, the next step will be elevating these settings so they're not just spaces but become experiences for your residents. To accomplish this, develop a transcendent design strategy.

Develop your transcendent design strategy

"What transcendent design asks is that you do more than simply respond to an older customer's—or frankly any customer's—needs. Stand back and consider what you can do to excite and delight your customers. To offer not just usability or access to something, but to offer a new and novel experience that excites them so much that, by doing so, you've created not simply a doorknob or a kitchen device, but a lifestyle. A new way to stay independent, to stay engaged, to stay productive... In fact, the greatest challenge for senior housing providers will not simply be trying to integrate new technology and design into their spaces and places, but to understand how they can introduce new experiences on a regular basis."

Joseph F. Coughlin, director of the Massachusetts Institute of Technology AgeLab, from the *Journal on Active Aging*¹⁸

Creating your blueprint

Step 4, Action item #5 continued

Coughlin captured the meaning of transcendent design well when he expounded on the somewhat esoteric term in his 2017 interview with the *Journal on Active Aging*.¹⁸

Now, with your fuller understanding of the intent behind transcendent design, thoroughly review your environments across all areas and through the lens of all departments, asking these questions:

- How do we create an experience that enhances health, wellness, and well-being in these spaces?
- How do we bring all senses to life with elements such as natural lighting, aromas, colors, sounds, nature, and water features?
- What aren't we doing and why?
- Considering that we spend 90% of our days indoors, what kinds of environments will support programs and self-directed wellness—along with the experiences they create?²⁰
- How do we address multigenerational and intergenerational use?
- How do we respond to residents' desire to have fun and build community?

When it comes to transcendent design, the details make all the difference.

The bottom line

While many elements go into building a wellness community, understanding and creating well buildings, sketching out a wellness environments map, and developing a transcendent design strategy will provide the foundation for what is needed within the physical environment.

More to consider:

- Create a sense of place that appeals to this population
- Assess all seven dimensions of wellness and build/remodel so the design of buildings, landscapes, and hardscapes supports and encourages healthy lifestyles and supports the wellness-based paradigm
- Avoid physical isolation by design by ensuring that place, space, and philosophy underscore the interconnection between people
- Maintain a logistical connection to the broader community, ensuring intergenerational access and interaction

Wellpoint Community at Hampton Cove: An example of the future today

When Phase 1 opens next May [2020] in Huntsville, Alabama, Wellpoint will be the start of a master planned development with an emphasis, and distinguishing edge, they believe, on health and wellness.

Charter Senior Living will be in charge of the 114 independent-living units, 50 assisted-living apartments and 26 memory-care suites on site. This community will be called Charter at Wellpoint.

In 2021, the property will add a 90-room boutique hotel, a 40-home active-adult community and the Via Center, a 50,000-sq.-ft. "progressive integrative wellness center." Near Wellpoint is a long-established neighborhood of 2,200 homes from which it hopes to draw members of all ages to Via.

LifeCenters Communities, the developer/sponsor of the 20-acre master planned community, together with Hutchinson Consulting, is distinguishing it as a place for proactive wellness that combines hospitality and healthcare.

"We conceived a prototype of a planned community cloaked in lifestyle rather than aging services," says LifeCenter's CEO Joseph McCarron. "We are promoting active engagement, wellness, social engagement and supportive care as needed."

Wellpoint is located at the 18th hole of a 54-hole Robert Trent Jones Golf Trail. Its Via Center will offer wellness planning and programming, health coaching, preventive care, fitness and lifestyle classes, medical offices, nutritionists, and a spa—float rooms, salt caves

and cryosaunas anyone? Other features will include the latest workout equipment and facilities and a restaurant with a cooking school to make healthy meals.

Via will also house The Enterprise Center, a coworking space open to the public as well as a collaborative "community incubator where various generations can work together, advance technology and create opportunities in aging services," says McCarron. That may mean partnering with local medical schools and universities, healthcare providers, community members, corporations, scientists and entrepreneurs in the field.

"The exhibiting trend is accelerating convergence," McCarron explains. "Collaboration is displacing competition. It's important to think about what organizations, nonprofits, educational and other respected institutions you could partner with to provide residents with opportunities and a sense of purpose."

LifeCenters has hired experts in their fields of hospitality and senior living. "The growth of senior living has largely been fueled by capital markets and real estate development," McCarron states. "This deal mentality has focused on real estate and financial returns without recognizing the significance of operations management."

Excerpted from Sally Abrahms' "A new master plan for senior living" in the Journal on Active Aging²¹

Creating your blueprint

Action item #6: Purchase products that support a multidimensional, person-centered approach to wellness

Organizations that embrace a wellness model will create a new normal within their communities. The focus will be on what residents can do—not on their limitations. This means offering care as one of many services instead of being defined by it.

This new vision for senior living will encourage residents to embrace their human potential, creating new perceptions of what it means to age. More to the point, it will create a new normal for what it means to age well.

As part of the shift to a wellness-based business model, your community will need to purchase products that support a multidimensional approach to wellness throughout the community.

Take the time to think about each setting and each dimension of wellness, and the products that will be needed. In your cafe, for example, you may wish to have long tables that seat six people. This would support the social dimension by creating intentional and unintentional connections.

People who live in amenity-rich communities are more content with their neighborhood, more trusting of others, and feel less socially isolated, according to the American Enterprise Institute.

Sally Abrahms, from the *Journal on Active Aging*²¹

Looking for person-centered solutions

As your organization explores products that support the wellness-based paradigm, one area you'll want to focus heavily on is products that align with person-centered solutions.

Look carefully at each of the following:

- self-directed wellness
- precision wellness
- integrated solutions
- specialization
- well-care
- a 24-hour activity cycle

For example, a wearable that can track food intake, calorie expenditure, activity levels, heart rate variability, and exercise duration and intensity would support efforts to deliver more person-centered recommendations for activity over a 24-hour timeframe.

Understanding your residents intimately will help your organization in creating or purchasing products that support your wellness vision. Staff will need to become students of your residents' needs, expectations, and aspirations. Results from your organization's wellness audit and wellness map will help you gain a more complete understanding of the products needed.

Keeping up to date on trends and research, and applying them to your product strategy

In making the shift to a wellness-based business model, communities will need to be aware of industry and scientific trends and research that have the potential to drive new programs, environments, and related products. For example, if research says outdoor exercise is beneficial to overall health and well-being, your community may wish to explore exercise trail equipment.

One way of maximizing this information is to have your community's wellness leader meet monthly with department heads to review the latest research. Together, discuss how these research findings might have relevance to your community's programs and environments, across all departments. And determine what products might be needed to support these areas. Ask yourselves the following questions:

- Why is this product needed?
- How will this product reinforce our community's wellness strategy?
- How will this product support our residents' efforts to embrace their potential?
- How will people of all ages and capabilities use this product?
- In what wellness environments will we deliver this product?
- How will this product create a memorable experience?

- Is this product evidence-based or evidence-informed?
- Who or what will deliver this product?
- What training is needed, initially and ongoing?
- Who will pay for this product and what is the ROI?

To demonstrate this approach in action, consider the findings of the ICAA "Visions of the Future Survey," which found that respondents expect the following six wellness activities and programs to increase over the next five years (2019-2023).²

Asking the questions above—along with others developed by your wellness team—identify products that might be needed for each of the following:

Five-year plans for wellness activities and programs	
Senior Living and Care, 2018 Active Aging Trends	More will be offered
Technology-led exercise using robots or Skype, or online programs	68%
Instructor-led exercise and fitness	62%
Education, lifelong learning, teaching	62%
Food and nutrition education and preparation	56%
Intergenerational—youth and older adults join in programs	55%
Health education, disease management	53%
Connections to nature/environment	52%

Creating your blueprint

Step 4, Action item #6 continued

As an example, take the first item on the list, “Technology-led exercise using robots or Skype, or online programs.”

You might ask:

- Is this solution appropriate for older adults with limited functional abilities?
- What products will be needed to support technology-led exercise?
- Will there be a need for building unique spaces?
- Will the environment require lighting that changes the walls, such as a jungle, hilltop or beach?
- Will it require a large wall-sized screen, along with a video library?

Then discuss what other products may be needed to achieve the experiences desired. On a small scale, the product could simply be a computer with a library of instructional videos.

The bottom line

Understanding your residents' needs, expectations, and aspirations—as well as anticipating how the latest industry and scientific research might affect your organization—will help inform the development of new environments, programs, and products. Together, these considerations will help ensure that your community's product selections support your wellness vision.

More to consider:

- Understand what residents and target audiences want
- Understand how and why the population you serve makes buying decisions (e.g., functionality vs. self-perception)
- Use different types of research to gain greater insight
- Address ageism with the products and services you offer
- Educate and change the story on aging through the content of promotional materials

Step 5: Implement and promote your new wellness model and strategy

How the industry positions and promotes this new wellness-based paradigm requires an altogether new approach. After all, the first thing that innovation demands isn't a new technology or new product, or even a new experience, but a new language, according to Joseph F. Coughlin, director of the Massachusetts Institute of Technology AgeLab.¹⁸

So, what is the language of wellness? And, how will this language help you develop a new brand promise—that is, your organization's statement to customers about what they can expect from your products and services?

As our industry shifts more fully to the wellness-based paradigm, we'll want to preframe potential residents' minds long before they call or visit our communities. This means your organization will need a brand promise that staff will be tasked to fulfill and live by, that will drive who the organization does business with and hires, and one that residents will embrace and share. Your newly created mission statement provides the launching pad for all of this.

The language of wellness

Wellness is about living the best life one can on the individual's terms, given their current and future capabilities. It's about embracing one's potential in areas of life that interest them. It's about seeing a new vision of aging and fulfilling it by understanding that even with limitations, a can-do approach to wellness will increase quality of life and improve lifestyles.

Wellness isn't about issues and limitations. It's not about judgements. It's not about trying to fix people. Wellness is about the individual taking responsibility for his or her own health and well-being. And it means communities need to support these decisions by providing environments that are conducive to self-fulfillment and inspiration.

Your organization will need to embed this language into its culture. And the staff will bring it to life. Policies should support this new language by being less restrictive and reflecting your new brand promise. Person-centered wellness programs will need to embody this language, offering opportunities for self-discovery. Environments will need to inspire wellness. And products should be inclusive of all capabilities so everyone can experience their benefits. Still, others will need to be specialized for individuals seeking precise or specialized solutions.

But regardless of how it's framed, the language of wellness and your brand promise will need to support your residents' needs, and expectations for a better life. New language will go far in positively transforming both your community's offerings and perceptions of senior living.

Once you've developed your mission statement, brand promise, and language of wellness, you can set out to promote your new wellness-based community to all.

Most of the tools you'll use to promote your community will remain the same—from advertising, to direct mail, to emails, to website and social media. What will change are your messages, approach, and audience. Like the “wellness in all policies” strategy, a similar “wellness in all marketing” approach is crucial to support the wellness culture, model, and connections across the community.

Creating your blueprint

Step 5 continued

Messages

Effective promotions and marketing must be rooted in the realities of life for older adults. It will be important to use the language of wellness—embracing all life has to offer no matter what the individual's capabilities. Keep it upbeat, positive, well-being-focused, person-centric, and paint a picture of this population as they see themselves. Avoid language about anti-aging or super-seniors. For example, a Ford Focus TV ad titled “For the Fun of It” shows a granddaughter and grandfather out for a drive. The grandfather uses the self-parking control, sits back with the granddaughter and laughs until the car is parked—just for the fun of it. The implicit message is a positive one focused on the joy that can be shared through new experiences.²²

Promotional materials should appeal to broad wellness needs, including enhancing independence, providing security, optimizing health and fitness, strengthening family and social relations, and having fun and enjoying life. Importantly, promotions should focus on how the community will help them lead the lifestyle they choose

By positioning your community as a wellness lifestyle—one that offers better quality of life, greater social connections, and access to wellness and well care services—the industry has an opportunity to reframe itself so it can attract more than the small percent of the older population it currently serves.

Approach

As you promote your new model, pay close attention to how this demographic sees itself—that is, as healthy, active, and engaged, versus how they've been viewed in the past. Offer an authentic, ageless, inclusive brand.

For example, in the ad for the Bank of Montreal titled “The Wallet,” a young man gives his grandmother a wallet as a gift. But she doesn't seem to understand what to use it for. She already uses the bank's app to store all her cash and credit cards, as well as to take out cash or send money. Like the Ford ad, the implicit message here is a positive one.²³

One outreach approach to take would be to educate residents and older adults in the greater community on the impact that their lifestyle choices have on their functional abilities and overall feelings of well-being—from healthy eating, to meaningful pursuits, to physical activity, to social and spiritual activities. Then, devise programs and campaigns with specific, measurable outcomes that enable your audience to act on your message.

Another approach would be to provide opportunities for residents to serve as wellness role models and educators. By doing so, you're providing a new sense of purpose by reframing their role and the role of your community in changing negative perceptions of aging.

Above all, ensure that each approach and strategy you take makes your residents—and potential residents—feel valued as individuals.

Audience

The base population of the industry continues to move into communities at an older age and with more acute health conditions that result in shorter stays. By moving to a wellness-based business model, your community now becomes more appealing to a broader mix of younger, healthier residents—while continuing to serve the needs of those requiring care. The big difference is that this wellness-based model looks beyond limitations. It now offers greater appeal to multiple generations who seek a longer, healthier life—as well as to your organization's investors.

Importantly, targeted outreach strategies should include outreach to allied services with an interest in wellness, geriatricians, other medical professionals, and places of worship within your greater community.

The bottom line

The success of your promotions moving forward rests on the language you use. And it all starts with your new story. So, think about how you can tap into the extensive reservoir of life experiences of your current residents to tell it. Real people, real images, and a real story—all told in appropriate language—add up to real results.

More to consider:

- Position your community as a lifestyle choice
- Pay attention to how baby boomers see themselves
- Follow website best practices and ensure that content underscores wellness and exudes positive messaging
- Keep materials genuine, clear, and concise
- Show consumers that they're valued
- Highlight the most standout aspects of the wellness paradigm
- Appeal to broad wellness needs across all seven dimensions
- Communicate that a wellness approach to care is available
- Develop and implement a targeted outreach strategy

Creating your blueprint

Step 6: Evaluate, adjust, reevaluate

Shifting to a wellness-based business model, with care, isn't a one-time proposition. It's an ongoing effort that will require routine evaluation and adjustment. This isn't simply to make sure that organizational commitment and effectiveness don't slip. It's largely because how society views wellness and our knowledge about well-being as we age will continue to evolve and expand.

Once your community's blueprint is in place and initially implemented, ICAA recommends that at a minimum, you reevaluate and adjust it annually—and certainly more often during times of change and flux. To ensure that appropriate follow-up happens, ICAA strongly recommends you create an annual implementation timeline to help you stay on track.

More to consider:

- Measure and benchmark outcomes
- Make program adjustments based on data
- Continually assess and reassess

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A better tomorrow

Demographics are changing. And so are attitudes about aging, creating new realities and new norms. Our industry not only needs to recognize and respond to these societal shifts, but it must approach these changes as opportunities for creative and altogether new ways of doing things.

The fact is, our industry serves an ever-evolving client base. And the approaches and solutions we apply must evolve as well.

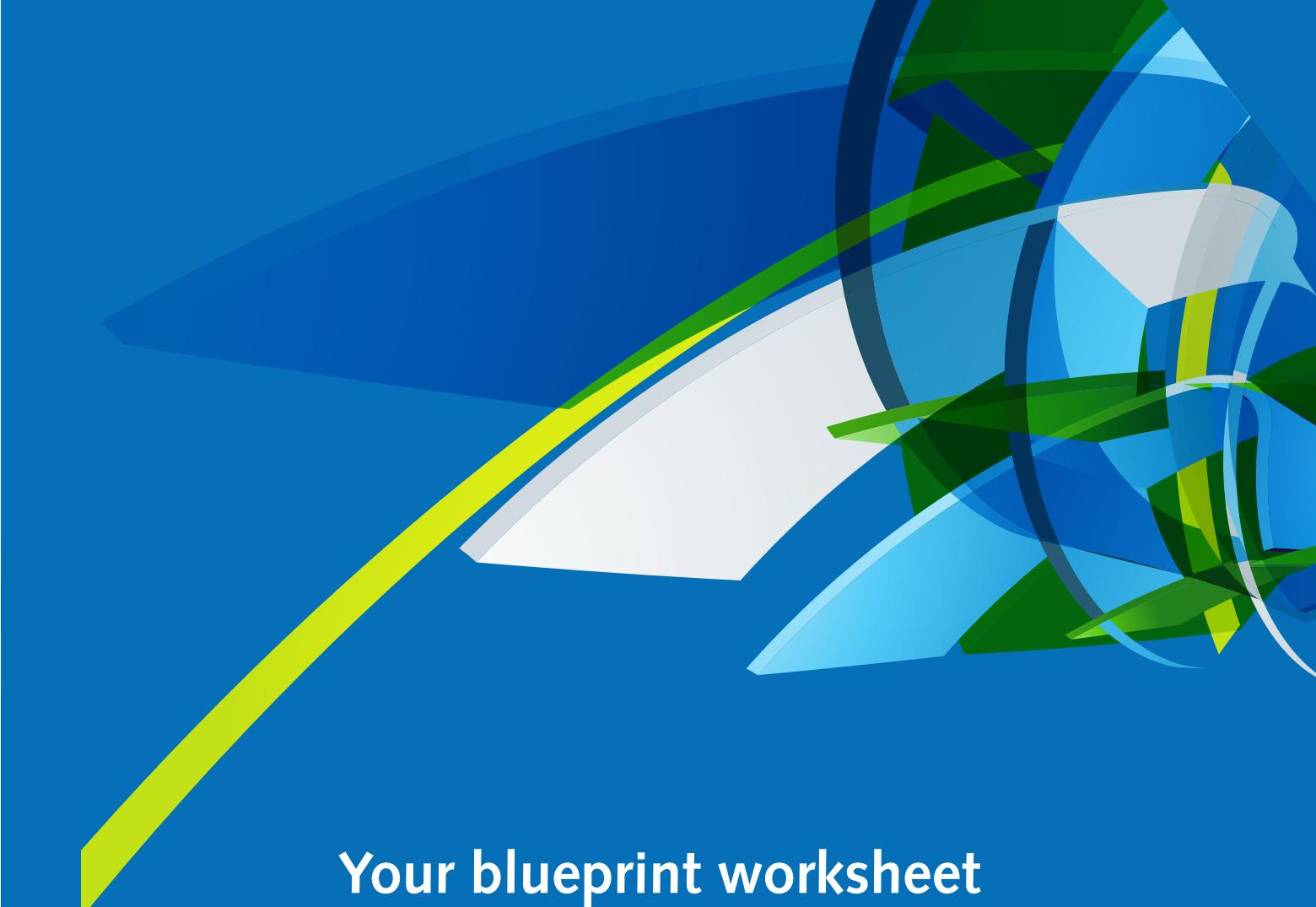
Making the shift to a wellness-based business model, with care, opens the door to tremendous opportunity for our industry. But it also enables us to make an even greater difference in the well-being of entire populations.

Simply, as the median age within societies continues to increase, so does the opportunity for us to be leaders in wellness.

Working in our favor are the baby boomers' evergreen spirit and their new view on how to live as you age, the convenience and versatility of technology, the broadening interest of wellness across all sectors of society, the adoption of telemedicine, and the disruption and rejection of old business models.

These guidelines provide you with an important tool.

ICAA believes that by using it to shift our industry to a wellness-based model, we can create a better tomorrow for the millions of people we serve.



Your blueprint worksheet

Your blueprint worksheet

This worksheet will help your organization develop and implement your “Blueprint for a wellness-based community” by enabling you to see just where your community currently stands. Specifically, it will help you identify those areas that need to be improved upon—or developed and implemented—as you move forward with your new model.

For your organization to get the most out of this worksheet, it's important to answer the questions accurately. A candid reflection will provide important insight on how to move most effectively toward a successful wellness, with care, model.

Directions

When answering the questions, circle “E” if your organization is excellent in this area, “M” if your organization is moderately good but could improve with focused effort, and “I” if your organization needs improvement—or if this area is altogether absent from your organization.

Commitment to change

- E-M-I Leadership understands what it means to age well
- E-M-I Leadership has a clear understanding of what a wellness, with care, model offers
- E-M-I The executive team fully understands the value of wellness
- E-M-I Wellness concepts are a priority in current and future planning
- E-M-I Additional investment in wellness, or reallocation of a portion of the care budget towards wellness, is planned
- E-M-I Leadership is committed to creating and implementing a wellness blueprint

Score: E_____ M_____ I_____

Wellness audit

- E-M-I Have developed a wellness audit
- E-M-I Have implemented a wellness audit across all departments
- E-M-I Have used information from the wellness audit toward developing a wellness blueprint

Score: E_____ M_____ I_____

Vision

- E-M-I Have a clear definition of wellness
- E-M-I Have a wellness-centric vision and mission statement
- E-M-I Ensure that all staff and residents understand the value of a wellness model and why the organization is committed to moving further toward it

Score: E_____ M_____ I_____

Philosophy

- E-M-I Listen to and understand the needs and interests of residents and staff
- E-M-I Take a person-centered approach in all aspects of the community
- E-M-I Create environments to support residents' desire to embrace their potential
- E-M-I Hold a "wellness for all" philosophy
- E-M-I Focus on capabilities—not age
- E-M-I Embrace the positivity effect of aging
- E-M-I Focus on interdependence
- E-M-I Provide judgment-free settings and staff
- E-M-I Meet residents where they are individually
- E-M-I Promote self-empowerment and self-directed wellness
- E-M-I Stay current on wellness trends and research, and apply to all areas of the community

Score: E_____ M_____ I_____

Staffing

- E-M-I Human resources is 100% on board with the new wellness vision
- E-M-I Have a wellness team to develop and implement the community's vision
- E-M-I Have a wellness leader at the executive level
- E-M-I Have roles in place to support the wellness culture
- E-M-I Duties related to wellness are in job descriptions for staff across all departments
- E-M-I Work with all staff in every department to support wellness
- E-M-I Wellness programs have full-time staff
- E-M-I Have a clearly defined wellness career path
- E-M-I Recruitment policies, efforts, and partners support the wellness focus
- E-M-I All new hires are provided wellness training during onboarding
- E-M-I Current staff members are reskilled to support wellness
- E-M-I Ongoing wellness education and training are provided to staff
- E-M-I New wellness educational partners are used
- E-M-I Staff evaluations and staffing ROI have been reviewed and or adjusted
- E-M-I Staff compensation matches the value of wellness

Score: E_____ M_____ I_____

Policies

- E-M-I A "wellness in all policies" strategy is in place
- E-M-I A "wellness in all policies" strategy has been implemented
- E-M-I Internal policies have been reviewed and adjusted to remove barriers to residents' wellness
- E-M-I Practices and policies that don't fit the new model have been eliminated

Score: E_____ M_____ I_____

Your blueprint worksheet

Programming

- E-M-I Take a person-centered approach to all programming solutions
- E-M-I Emphasize all dimensions of wellness in all programs
- E-M-I Provide precision-wellness solutions
- E-M-I Offer programs for those with needs that require specialization
- E-M-I Maintain healthy literacy and education as a foundational pillar
- E-M-I Focus on all aspects of life, across a 24-hour activity cycle
- E-M-I Provide a greater choice of offerings to meet the diverse needs of the population
- E-M-I Follow an engagement strategy
- E-M-I Offer self-directed opportunities for residents
- E-M-I Provide instructor-led programs
- E-M-I Base programs on capabilities and interests, not age
- E-M-I Deliver programs indoors and outdoors
- E-M-I Deliver programs online
- E-M-I Provide programs to the broader community

Score: E_____ M_____ I_____

The built environment

- E-M-I Maintain a “well” building environment
- E-M-I Have a “wellness map”
- E-M-I Ensure environments offer person-centered solutions
- E-M-I Ensure outdoor environments support all dimensions of wellness
- E-M-I Ensure indoor environments support all dimensions of wellness
- E-M-I Follow a transcendent design strategy
- E-M-I Provide opportunities for self-discovery
- E-M-I Support interconnection with people within the broader community through environments and programs, ensuring intergenerational access and interaction

Score: E_____ M_____ I_____

Product purchases

- E-M-I Support the community's multidimensional approach to wellness across all areas of the community
- E-M-I Support person-centered solutions, including:
 - Self-directed wellness products
 - Precision wellness products
 - Integrated solutions
 - Specialized products
 - Well-care
 - A 24-hour activity cycle
- E-M-I Create a memorable experience
- E-M-I Meet the diverse capabilities of residents
- E-M-I Offer a meaningful ROI for the community and residents
- E-M-I Employ evidence-based, evidence-informed products
- E-M-I Offer training for wellness staff

Score: E_____ M_____ I_____

Marketing

- E-M-I Have a "wellness in all" marketing focus
- E-M-I Marketing supports mission statement
- E-M-I Have a new brand promise centered on wellness
- E-M-I Make consumers feel valued
- E-M-I Have a plan for continually communicating the new vision
- E-M-I Use the language of wellness
- E-M-I Avoid language about anti-aging or super-seniors
- E-M-I Have a plan for repositioning the community in the public eye
- E-M-I Have a strategy for gaining broader appeal among the next generation of residents
- E-M-I Address ageism with the products and services offered
- E-M-I Ensure that the content of promotional materials is educating and changing the story on aging
- E-M-I "Embracing all life has to offer no matter what the individual's capabilities" is a core message in all messages in all communications
- E-M-I Have a strategy for raising awareness of the wellness model and its benefits within the marketplace
- E-M-I Are strengthening broader community relationships
- E-M-I Are committed to painting an authentic picture of this population
- E-M-I Are making residents and potential residents feel valued as individuals
- E-M-I Offer an authentic, ageless, inclusive brand

Score: E_____ M_____ I_____

Your blueprint worksheet

Return on investment

- E-M-I Measure and benchmark outcomes
- E-M-I Make program adjustments based on data
- E-M-I Continually assess and reassess

Score: E_____ M_____ I_____

Total score

"E" Excellent: _____

"M" Moderate: _____

"I" Improvement or implementation: _____

Next steps

Step 1.

Keep doing what you're doing within the areas that received a score of "E." For all other areas, prioritize those that should be addressed first so they don't impede your success with the wellness model.

Step 2.

Create and implement your blueprint for change based on your strengths and weaknesses. You can also apply this information to a SWOT analysis.

Step 3:

In six months, repeat. See where you've improved, and adjust accordingly. Repeat this exercise every six months.

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About ICAA

International Council on Active Aging®

Changing the Way We Age®

The 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 organizations focused on older adults benefits both the people they reach and the organizations themselves, ICAA has a vision shared by over 10,000

organizations. ICAA's support of the active-aging industry includes Industry Research Reports, environment and program development, market development, education and research on healthy aging and wellness, and Active Aging Week.®





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