

Retirement Communities

Planning for a Friendly Future

Wellness and resort-style amenities dominate luxury senior living communities

by *Tonie Auer*

Senior housing has evolved over the past 10 years, creating more options in varying price points and in more markets. Even better, the emphasis has moved from institutional facilities to community, wellness and staying engaged.

“Senior housing today is really focused on remaining connected with surrounding communities,” says David S. Schless, president of American Seniors Housing Association. “While the people moving into these communities are older, they’re still looking to grow and stay as healthy and as independent as possible.”

“There is an entire range of activities and programs that are part of these communities now that you wouldn’t have seen a number of years ago,” he says. “They are vibrant and encourage residents, even at an advanced age, to continue growing and doing the things they love to do.”

EVOLUTION OF SENIOR LIVING

Activities and surroundings are some of the biggest changes in senior living. “Operators are paying attention to the way they use space,” Schless says. “For instance, many communities feature a bistro and multiple dining areas. In the past, there was one dining room, and the meals were served at certain times with no flexibility. That’s not how people want to live. They want to eat when they want, and they want variety.”

Spaces are designed with inviting atmospheres to encourage interaction and make the community feel like home. Many seniors experience a reawakening after making this new adjustment; instead of feeling like they are in decline, they now have purpose.

“They find their lives much more fulfilling,” Schless says. “We often hear residents say they wish they had done this years ago. They’re making new friends and meeting for activities.”

The Wall Street Journal news organization was not involved in the creation of this content.



TidePointe in Hilton Head, South Carolina, features country club amenities and a coastal atmosphere.

PHOTO COURTESY OF VI

PICKING A PLACE

Schless encourages families and seniors to visit different communities, stay for a meal and talk to residents and staff. “Don’t just focus on one — find a place that will really speak to you, where you feel comfortable,” he advises.

Senior living options are often defined by the acuity level of an individual, says Randy Richardson, president of Vi, which operates 10 Life Plan Communities across the U.S. Skilled nursing is on the far side of the continuum for those who need 24/7 care, followed by assisted living and memory support. Independent living is where most residents start, and Life Plan Communities (formerly known as Continuing Care Retirement Communities or CCRCs) combine all those on one campus. They’re for the planners who ponder the possibilities of needing more care as they age.

“Most people move into independent living in their late 70s, because they don’t want their kids to have to worry about finding a place for them later if they need care,” Richardson says. “They understand what their living experiences will likely be over the next 10 to 15 years.”

Most Life Plan Communities have a buy-in model with a refundable component, says Adam Payn, vice president of sales and marketing for Pacific Retirement Services. With an entry-fee model, a sizable amount of money is required, he explains. The cost varies by unit and community, from \$300,000 to \$900,000. Entry fees are 60% to 90% refundable, depending on the operator

and property when a resident passes away or moves out. There is also a monthly fee for amenities, services and so on. Those can range from \$4,000 a month on up.

“As they age, there are a variety of levels of care on site from assisted living, which helps with bathing, dressing and so on, through long-term nursing around the clock,” Payn says. “Memory care is a specially designed space to meet their needs, and we also have hospice and palliative care. These residents move in and live a great lifestyle, and they have a plan in place for the future.”

At Hayes Barton Place, under development by Liberty Senior Living, the Life Plan Community operates on a rental basis. “Most people who come to these communities are planners looking for financial options best suited to them,” says Donna McCaskill, senior residency counselor. “While every community has a monthly fee, some people like the flexibility of the rental financial plan, which allows them to manage their assets versus paying a large upfront deposit and waiting for a refund when they leave the community.”

“At the end of the day, the average customer winds up paying the same amount across different community models,” says Will Purvis, president of Liberty Senior Living. “There are a lot more rental properties being developed now. As people are planning, many like the flexibility of not getting tied down to one community.”

Ultimately, this is the route for people who want to remain engaged socially. “That is the beauty of senior living communities,” Schless says. “The ability to not be alone and to make new friends.”

Tonie Auer is a freelance writer focused on real estate and construction.



PHOTO COURTESY OF VI

TidePointe's wine room is a great example of amenities found at the South Carolina community.

A Quick Guide to Senior Living Options

Elder care communities come in all shapes and sizes. These are the most common accommodations, according to the American Seniors Housing Association.

Life Plan Communities include independent living, assisted living, skilled nursing and memory support services, typically provided on one campus. Payment is usually a one-time entrance fee and a monthly fee, covering services, amenities and access to long-term, on-site health care, if needed. There is also a rent-based Life Plan model with fees that vary along the continuum of care.

Independent living is a residential setting for older adults who require minimal to no assistance. Hospitality and supportive services are generally provided. Residences may be apartments or freestanding homes obtained for an entrance fee or through a rental arrangement. A monthly fee for services and amenities may be required.

Assisted living is a combination of housing, personalized support services and care for older adults who require help with daily activities such as eating, bathing, dressing, toileting and walking, while still remaining in their own unit. Residents usually pay a monthly rent, plus fees for care-related services.

Memory care/memory support facilities specialize in services dedicated to residents with Alzheimer’s, dementia or cognitive impairments. These facilities can be either freestanding or part of an existing senior living community.

Skilled nursing facilities offer licensed, around-the-clock medical care to assist residents with most, if not all, daily living activities. They are typically Medicare-/Medicaid-certified. Monthly fees include meals, personal assistance and most medical services (except for medications). Nursing homes often fall under this category.

Active adult communities, typically restricted to people who are 55 and older, are usually single-family homes or multifamily properties, either for sale or for rent.

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Left: A Mirabella at ASU resident receives her Arizona State University ID card from ASU's Lindsey



PACIFIC RETIREMENT SERVICES

Innovative Approaches to Senior Living

by *Tonie Auer*

Retiring on a college campus. Conducting studies on how moving into a Life Plan Community enhances one's well-being.

Combining hospitality with senior living management in new college majors. These are all advances in the elder care industry right now.

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Mirabella residents who have knowledge and skills from their careers in various industries," Beagley says. "And it's a way for retirees to leverage their experience in meaningful and impactful ways after retirement."

In addition to the opportunity to take classes, ASU offers a professional teaching assistant program, which allows Mirabella residents to help professors in a classroom setting or give career development lectures. There's also an intergenerational docent program at the ASU Art Museum.

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who choose to live here are drawn to the idea of giving back and ensuring success in the next generation of learners and leaders," she says.

TESTING THE SUCCESS

Continuing the learning efforts, planners have become engaged in research on how to best serve the growing senior population. "Because people are living longer, we want to better understand the impact our communities have on senior living," says Mary Leary, president and CEO of Mather, a senior living Life Plan Communities operator. The organization's research arm, Mather Institute, was created in 1999 to lead research efforts and share innovations. By collaborating with universities, the institute serves as an innovation incubator with the goal of transforming the senior living industry by bringing cutting-edge research to real life.

Currently, the Mather Institute is collaborating with Northwestern University to conduct a wellness study focused on Life Plan Communities. The study is entering its fourth year.

"We have had great results," Leary says. "The five-year Age Well Study is the only national longitudinal study evaluating the impact of living in a Life Plan Community on residents' cognitive, physical and psychosocial health and well-being. About 92% of residents surveyed were satisfied with living in a Life Plan Community — even during COVID-19, their feelings and perceptions were positive."

TEACHING THE NEXT GENERATION

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Business is the third-oldest hospitality program in the country. Ten years ago, university leaders were approached by a group of senior living community executives interested in partnering to train hospitality students in the senior living realm.

That meeting led to the creation of an original program where business, hospitality and senior living are married. "We have had industry COOs and presidents come together to share what the industry needs: high-quality, trained people to run their companies," says Nancy Swanger, founding director of the Granger Cobb Institute for Senior Living at the Carson College of Business.

Those same leaders created the curriculum for the introductory class and provided professionals to serve as course instructors. Last fall, a senior living management major was added, and a minor is coming next fall. For non-degree-seeking students, there is an online certificate program, as well.

The research portion serves as a hub to set up partnerships. In one study, a nurse gerontologist is working with a company that produces bidets, studying their use in dementia or memory-care facilities. Toileting is one of the most difficult aspects of caregiving, so making this act easier might improve employee retention, Swanger says.

Part of the graduation requirement for most hospitality majors is to have 1,000 hours of hospitality or senior living employment. "With senior living, you have a caring heart for older people and see that as rewarding and fulfilling," Swanger says. "We listen to the industry to deliver the students who can hit the ground running."

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What Older Adults Really Want



PHOTO COURTESY OF SHENANDOAH VALLEY WESTMINSTER-CANTERBURY

Walking trails like this one at Shenandoah Valley Westminster-Canterbury are an amenity in demand. Residents enjoy the opportunity to exercise in the outdoors.

by *Tonie Auer*

A morning swim or stretch class. Meeting friends for a glass of wine in the evening. That's the kind of lifestyle Allen and Kathleen Moore are planning for in their retirement.

When the couple started contemplating their next step after retirement, it wasn't a stretch to consider a Life Plan Community, where they could enjoy resort-style amenities and have the appropriate level of care available all in the same location. "My 97-year-old mother has been living like a rock star in The Mather in Evanston, Illinois," Kathleen says.

The Moores are self-proclaimed planners who enjoy socializing. "We like the idea of going downstairs for coffee or breakfast on our own and joining friends for dinner," Allen says. "We actually anticipate a rich social life simply because there are so many people close by.

We can meet up at the garden patio or in the library. Or we can talk in the green space or while walking our dog."

"We're trying to be smart about the future, and we are familiar with retirement communities," Allen continues. "So, we decided to investigate local options and see if anything made sense to us." At 76 and 64, respectively, Allen and Kathleen have reserved a spot in The Mather in Tysons, Virginia, which is under development with a targeted opening in 2023.

"With that time frame, we should be ready for that next step," Allen says. "And the location is perfect because it is so close to where we live, which is a plus. We

have family and friends nearby, and our church home is here."

The couple has roots in the community. Allen spent much of his life working in politics as Under Secretary of Commerce for President Reagan, White House aide to President Ford and senior aide to two U.S. senators, among other roles. The D.C. area has been home for some 50 years. Kathleen, 64, has lived in D.C. for over 30 years. She was a trained dancer before studying for the ministry. She retired from congregational work, but she still works part time as a leadership coach for churches.

"Most Life Plan Community customers — around 85% — come from within a 15-mile radius of one of our locations," says Randy Richardson, president of Vi, which runs 10 Life Plan Communities across America. "These people have their golf courses and club ame-

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nities that are a big part of their lives and they want to continue those social experiences even if they move. And, when they transition to our community, we often see a herd follow when their friends see the appeal.”

Moving into an attractive, high-quality-living, amenity-rich environment without having to move away is very appealing to wealthy seniors, Richardson adds. For The Mather in Evanston, the location is one of the amenities itself, says Mary Leary, president and CEO of Mather. The Mather in Evanston is 100% sold and 99% occupied.

IN THE MIDDLE OF THINGS

“People love the location,” Leary says. “We are on the edge of Downtown Evanston, two blocks from Lake Michigan and two blocks from Northwestern University. Our residents can walk to entertainment, restaurants, retail and services, take a class at the college or go to the beach.”

Among the most popular amenities are the outdoor spaces and multiple restaurants, from al fresco on the rooftop overlooking Lake Michigan to casual dining and cocktails in the lounge to fine dining.

“We spend a lot of time and effort on our dining program, because beyond the food, it is also a social experience,” Richardson says of the Vi communities around the U.S. “If you’re eating in the same two or three dining options in a community, you have to change up the menu regularly. Creating healthy food options for seniors, such as using less salt and adding quality spices that enhance flavors, is becoming more important.”

“Twenty years ago, most communities only had one dining option,” he continues. “Today, each Vi location has three, including a quick-serve bistro and a full-scale dining room experience for both casual and fine dining. We also have private dining rooms for special occasions.”

“We recognized the importance of the food options and partnered with the Culinary Institute of America to develop proprietary meal prep for seniors. They have been training our executive chefs and front-of-house staff since around 2004. It is a tremendous benefit, as we serve one-plate-at-a-time meals, like in a restaurant,



PHOTO COURTESY OF LIBERTY SENIOR LIVING

Residents at Liberty Senior Living's South Bay community can dine outdoors or simply enjoy sunny days on the patio. Adjacent park space provides an abundance of ways to gather with friends.

and that is a big selling point. We prepare everything on site, from making our own soup to baking all our pastries. We even make ice cream,” he says.

FOOD FOR THE SOUL

Fueling the creative juices is another draw for residents. Vi has its own brand for its activities program: Living Well, which offers more than 600 programs, including traditional activities like playing cards and bridge groups, lecture series with university speakers, brain games, trivia contests, memoir writing, volunteer opportunities and more.

At the Mather in Evanston, “We have a very strong focus on creative arts as well, and employ a number of art and music therapists,” Leary says. “We also have programs that partner with the culinary staff to focus on cuisines from around the world. We’ll have everything from menus to music and informative lectures focused on specific regions.”

The Mather in Tysons, where Allen and

Kathleen plan to live, will be like the location in Evanston, with walkability and numerous lifestyle options. “The Metro is four blocks away with a direct line to the Smithsonian, among other destinations,” Leary says. “We will also have a large park adjacent to our site, along with a private park for residents. There will be tennis courts, a dog park, walking paths, a concert lawn and private areas that include gardening spaces, a golf simulator and a fire pit.”

Tysons will have two towers, with the second tower targeting a 2024 opening. Phase one is already 82% pre-sold.

“We’re also addressing what the next-gen customer wants in terms of apartment homes,” Leary says. “They’re accustomed to living in a very spacious home and might not want to give up square footage. We have homes in a variety of sizes. We are also providing smart homes with technology, allowing each home to have its own automation hub with access to their device,

controlling everything from automated lighting to temperature settings, appliances, window treatments — you name it.”

Additional perks include access to valet parking, work order requests for repairs and meal delivery. And for those who like to cook, gas cooktops — which are not always an option in apartment living — are featured in each apartment.

AMENITIES AND BEYOND

Vi’s Richardson says it is all about bringing hospitality-level services to senior living. Residents enjoy having a beauty salon and spa on site, in addition to the amenities surrounding physical health.

“We have seen expanded demands by customers for more physical activity space,” Richardson says. “We have trainers and full-size gyms featuring the latest equipment. Or you can create your own workout regimen and plug into equipment to track and monitor. Every location we operate has a swimming pool, and some locations have two. At our location in Naples, there is an 18-hole golf course, bocce court, tennis court, a full-size health club and an entire building dedicated to physical fitness.”

Wellness is also important at The Mather. The Tysons location will include an indoor swimming pool, sauna, whirlpool, fitness center, day spa and more. The Evanston location already has these features in place.

“We really look forward to having more of a community directly around us,” Kathleen says. “That is a big part of our decision. It has been so good for my mom. The Mather in Evanston encourages the residents to use their gifts in ways that can benefit the whole. She was a musician and teacher and created the Mather Singers. She loves to sing. Like my mother with the music group, I could help build a spiritual life or offer dance classes. There is a wealth of cultural activities that happen, so I feel like we will grow intellectually and spiritually.”

“The thing that surprises people the most is the residents’ ability to live a really engaged lifestyle and the friendships they form,” Leary says. “Being engaged is critical for people’s health and well-being.”

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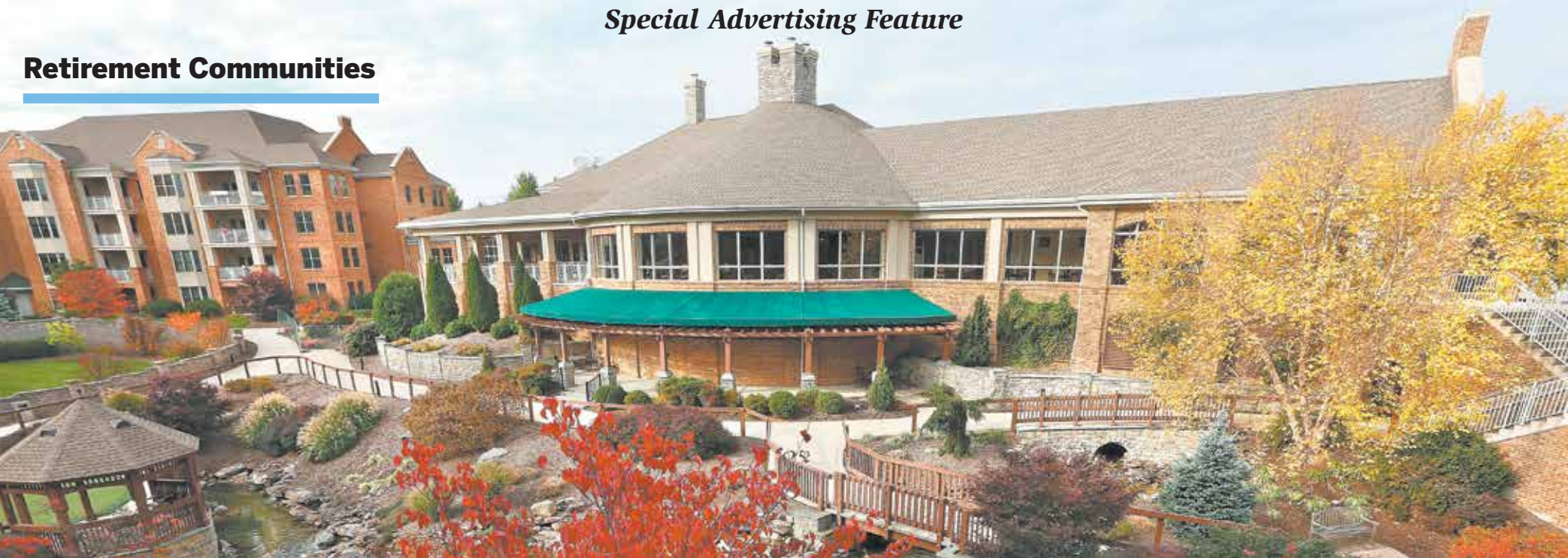


PHOTO COURTESY OF SHENANDOAH VALLEY WESTMINSTER-CANTERBURY

Residents at Shenandoah Valley Westminster-Canterbury bask in the beautiful scenery of life along the Eastern Seaboard.

Living in the Heart of History and Culture

by *Tonie Auer*

Retirement today doesn't relegate seniors to games of canasta or hanging out at the local diner drinking coffee. And, it certainly doesn't have to mean a move to Florida to avoid a dreary existence in an institutional environment.

Along the Eastern Seaboard, hidden gems are nestled in college towns where everything from beautiful scenery to entertainment opportunities abound.

"Location is everything," says Shenandoah Valley Westminster-Canterbury (SVWC) sales counselor Leila A. Orndorff. "Based in Winchester, we have Washington, D.C. about 70 miles to our southeast, Dulles International Airport is an hour away, and we sit at a crossroads of Interstate 81, Routes 7 and 50, and we are close to I-66."

Many residents at SVWC come from the northern Virginia and D.C. areas, Orndorff says, looking to get outside of the metropolis but hoping want to have access to big city living when they please.

OFF THE BEATEN PATH

Another desirable location is in Raleigh, North Carolina, at Hayes Barton Place, which is being developed by Liberty Senior Living at Hayes Barton Place. This new

community will sit on 5.5 acres adjacent to the Hayes Barton Historic District, says Donna McCaskill, Hayes Barton Place senior residency counselor. The planned 169 residences — with a targeted 2024 open — will cater to an upscale clientele, she says.

Both SVWC and Hayes Barton Place are Life Plan Communities (formerly known as Continuing Care Retirement Communities). SVWC has a front-loaded payment structure, and Hayes Barton Place has a rental model.

"The beauty of our community is its location, next to the most historic area of Raleigh, where there has been very little space to have any kind of development. We will be positioned conveniently to restaurants, shopping, churches, hospitals and multiple colleges," she says.

Orndorff notes that Winchester is often a surprise for people from metro areas. "They worry about losing amenities, but once they are here, they become im-

mersed in the community," she says. "Shenandoah University is a huge part of that with educational offerings and a conservatory with year-round theater and musical performances."

"We do enjoy a slower pace with less traffic, but we still have many great assets as well as picturesque vistas," she adds. "The campus sits on 87 wooded acres with a trail network featuring well-marked pathways and wooden benches made by our residents in the woodworking shop."

HAVING A VOICE

At SVWC, resident activities like woodworking often result from resident input, Orndorff says. The community's music program blossomed — even beyond having a full-time music therapist on staff — from the residents' love of music.

"We have a monthly Bistro Concert Series spearheaded by our residents, and it encompasses a variety of genres from swing to Celtic," Orndorff explains. "World-renowned pianist Thomas Pandolfi comes to our community to perform and, outside of pandemic protocols, we open the concerts to the public. It is remarkable to have someone of his stature here."

Because much of the programming is driven by the community, there's always

something for everyone. "It is important for our people to have a voice," she continues. "All are members of a residents' association, and they have their own leadership. The president is a voting member of our board of trustees and has a say in how we plan strategically, including development and expansion decisions."

"They've had a role in SVWC's plans for hybrid villas, which are a fusion of cottages and apartment units featuring garages and patios," she says. "Construction is slated to begin this year, with a completion date of 2023."

At Hayes Barton Place, prospective residents will have a say in planning the new development. The refundable \$1,000 Priority Partner deposit opens the door to future opportunities and to providing input on amenities and programming.

"Liberty Senior Living has locations across North and South Carolina, and they are not cookie-cutter projects," McCaskill says. "We want Hayes Barton Place residents to share what they want in their community. We want partners to be engaged and part of the process. It's about more than having a heated pool or exercise room. We want to include Priority Partners' input on amenities to create a truly special community."

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RENDERINGS COURTESY OF MATHER



Top: Rendering of The Mather in Tysons, Virginia, which will be built in two phases. Below: Rendering of one of the patios at The Mather. The project coming in 2023, will include tennis courts, a dog park, an outdoor concert area, a fire pit and a golf simulator.

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