



Mather Lifeways Study Identifies Expectations of CCRC Residents about Transparency

“How much information do you need to share with residents who call your community home?” “What input/influence do residents have regarding operational decisions?” These are two questions asked by researchers from Mather Lifeways Institute on Aging of executive staff who oversee continuing care retirement communities, otherwise known as life plan communities. The purpose of the study was to understand how these communities are responding to changing resident desires as well as the benefits and operational challenges associated with increased transparency and resident participation in decision-making. To download "Resident Expectations Regarding Transparency and Decision Making," please visit <https://www.matherlifewaysinstituteonaging.com/senior-living-professionals/free-industry-information/transparency-survey/>.

The survey was conducted from November 2016 to March 2017. Providers were recruited by word-of-mouth with 260 communities participating (13% of CCRCs nationwide) so it was not a random sample. Non-profit providers comprised 87% of respondents while 49% of respondents were from CCRCs that have a religious affiliation. 58% of respondents were from single site communities, and 29% of respondents represented communities located in the South.

Executive staff who work in these communities identified the top two areas of resident interest in transparency and engagement in decision-making as details about expansions and renovations and increases in monthly service fees. The top two services and departments of interest related to resident engagement in decision-making were culinary services and resident programming.

Survey respondents generally reported stronger resident interest in transparency in decision-making, but overall, strong interest was reported in both areas. Nearly all respondents (92%) reported that residents are very interested or somewhat interested in transparency of information, while 86% of respondents reported that residents are very interested or somewhat interested in having input in decision-making.

63% of respondents indicated that resident desire for transparency is greater than it was three years ago which has made management’s role more challenging according to 87% of respondents. But, on the flip side, 79% of respondents indicated that it resulted in better relationships between management and residents.

The report identifies what respondents believe are the advantages and disadvantages of increased transparency and resident involvement in decision-making. It also includes tips on how to successfully respond to resident expectations in these areas including: setting clear boundaries about the extent of resident input allowed, developing a small number of solutions to present to residents for discussion, utilizing resident committees (24% of respondents reported having 16 to more than 50 committees while the remainder have fewer committees), clearly defining the types of decisions in which residents can have input, reminding residents that management needs to consider what is best for the entire community and its long-term success, and providing information before it is requested.

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Residents serve on the community or parent board of 60% of CCRCs that participated in the study. However, only 83% of those residents are voting board members. Not-for-profit community respondents were more likely to report that residents serve on the board compared to for-profit (95% vs. 76%). Nearly 3/4 of respondents reported that resident representation on the board affects operations positively while 25% reported that it does not affect operations, and 2% reported that it affects operations negatively. Respondents who reported that residents serve on their board were asked how they would prefer residents to be selected. Selection by the board was preferred by 36% of respondents while 18% preferred selection by the resident council, 19% by residents and 18% by management. This is interesting because other studies have shown that it is preferable for resident representation to be vetted, selected, and trained in the same way as other members of the board. These same studies suggest that there is an inherent conflict of interest with a member of the resident council serving on the board of a CCRC since that person's primary responsibility would be to residents rather than to the organization and its current and future success and financial strength.

Report finding should not be a surprise to Florida CCRCs since residents have long pushed for increased transparency. As a result, chapter 651, Florida Statutes, includes a lengthy list of documents and information (click [here](#) for a checklist developed by LeadingAge Florida) that must be disclosed to prospective residents and residents. The list has expanded multiple times as expectations of consumers in Florida have changed. Some CCRCs voluntarily provide even more information to prospective residents and residents.

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