

BREAKING

THE MOLD

*Crafting High-Payoff Places for
Rich Personal Experiences*

CONTENTS

CONTRIBUTORS

INTRODUCTION: What Sells, What Works, What Sustains?

Part I – The Centrality of the Guest / Resident Experience

The Built Environment

The Experiential Environment

Part II – Lensing

What is Lensing?

How to lens

“What are we missing?”

Affinity Lifestyles

Part III – Cost and ROI

Functional Obsolescence

How to Make a High ROI Plan

Return on Intent

Part IV – Cooking with a Proper Recipe (Avoiding the “Un-Built” Design Awards)

Thank you for the Unbuilt Project Award

What did you never build?

Part V – Taking the Next Step

WELLPLAN GROUP

Providing Strategies for Fruitful Senior Living
Wellness by Design; Yielding High Payoffs!

“The next wave of older adults has even less interest in our products than the generations living in (Life Plan) Communities today.”

“If we don’t build a congregate living experience that makes staying at home pale in comparison, we are toast.”

-CONFESSIONS OF A CHIEF STRATEGY OFFICER ¹

¹ <https://seniorhousingnews.com/2017/12/18/confessions-chief-strategy-officer-senior-housing-industry-lacks-imagination/> accessed 2/1/19 – Senior Housing Industry Lacks Imagination, Senior Housing News, published 12/18/17

CONTRIBUTORS

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**INTERNATIONAL SOCIETY OF HOSPITALITY CONSULTANTS
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Mr. Anderson, a 30-year veteran in the leisure industries, is the founder and CEO of Anderson and Associates, a consultancy firm specializing in developing and programming issues related to planned wellness communities, destination resorts as well as resort, recreation and lifestyle issues. He is sometimes referred to as the “dream killer” as he vets clients’ creative ideas to see if they are financially feasible. To this end, his job is to provide objective and empirical support to move forward or not.

Mr. Anderson sits on the board of directors for the Cal State Long Beach Hospitality Management program, and is also a full-time faculty member at both the Collins School of Hospitality Management at the California State University’s campus in Pomona, CA. and the California State University Hotel Management Program in Long Beach, CA. He is a member of the International Society of Hospitality Consultants, an invitation-only organization composed of approximately 200 members from 37 countries, dedicated to technical and ethical excellence. Additionally, he is a member of the Global Wellness Summit a vetted group of 300 industry leaders from over 80 countries who evaluate the social, medical and financial impact of lifestyle, wellness and leisure issues globally.

Mr. Anderson holds a Bachelor of Arts from the University of Pennsylvania and a Master of Professional Studies in Hotel Administration from Cornell University.

ADRIANE BERG

FOUNDER OF GENERATION BOLD

Adriane Berg is the founder of Generation Bold, a futurist, business development, staff training and outreach firm specializing in the Boomer and Mature Markets. Clients include municipalities, real estate developers, and tourism boards, among many others. She is also a spokesperson and message creator for advertising and branding campaigns.

As the boomer generation ages, millions take on a new and bolder life style...hence they become, Generation Bold! We look at the “psychography” of how these markets think and act, what they want and need. We believe that the Boomer and Mature are unified, not by their chronological age, but by their enthusiasm for lifelong relevancy and quality of life.

To meet the needs of these markets, Adriane has invented a system called LENSING. She works with your team to evaluate your practices, designs and staff training through the “lens” of the Boomer, Mature and Family Caregiver markets. The result is change that meets the highest standards of ROI.

Adriane hosts Generation Bold: The Fountain of Truth, syndicated on BIZTALK Radio. She is the popular blogger of, Aging for Beginners, published by Bottom Line Personal. Ms. Berg graduated Phi Beta Kappa and Kappa Delta Pi from Brooklyn College, and was an Editor of the Law Review, NYU School of Law, where she achieved her Juris Doctorate degree.

SCOTT GIRARD

PRESIDENT OF LANDECONICS

Scott is the President of [LandEconics](#), the proven, data-driven software program delivering cost savings for smart landscapes. Scott has over 45 years of passion and experience in the design, construction and maintenance of large-scale projects around the globe. He served as the head of Landscape Architecture & Horticulture worldwide while at Disney Imagineering for almost three decades. His diverse portfolio of projects includes international eco-tourism sites, theme parks, destination resorts, multiple Olympic games, international festival and recreation events and senior living campuses and communities totaling over \$6 billion in capital development. And as a baby boomer himself, for the past decade, he has focused on creating places that engage, enhance and inspire today’s ever-growing legions of fellow boomers, and the expectations they are carrying with them into retirement.

BRAD SMITH

Founder & Chairman of Brad Smith Associates, Inc.

As the Founder & Chairman of Brad Smith Associates, Inc. encouraging excellence is Brad Smith’s passion and purpose. He leads, equips, and nurtures champions in the Aging Services Industry – utilizing a process he calls PLACE-Creation. The ingredients include Planning, Lifestyle, Aesthetics, Community, and Economics coalescing to create places that people want to be. A landscape architect and land planner by profession, Brad’s mold-breaking exterior planning and design firm uses a rational problem-solving approach, coupled with Imaginality™ to bring your desired outcomes into reality. Click here to learn about [BSA PLACE Creation](#).

THE STORY OF BREAKING THE MOLD

The senior housing, hospitality, healthcare and wellness product industries are leaders in great innovation with disruptive potential. Companion robots, digital health, and even the driver-less car all came out of the needs and demands of growing older.

With regard to the built environment, the smart house, wellness guest rooms, day spas and universal design are all fueled by the appetite for better experiences coming from the mature market.



I know that within your company, whether focusing on facilities, residences, hotels or product lines, you are ever seeking the best practices, the best design, the best outcomes and the highest Return On Investment (ROI).

And yet...

Too often a preliminary visit to an assisted living complex ends in disappointment. Life within the walls seems, frankly, grey. As for hotels, rooms have been commoditized, with home sharing vacations taking an ever-growing bite of the market.

In this Ebook, we seek to take a tiny step to wake up and stimulate the creativity we know you have within your organization. Our goal is to guide you in coming up with your own financially-rewarding ideas. They are there already... you just need to BREAK THE MOLD to reveal them.

Image by Brad Smith, Bok
Tower Gardens, Florida

Moore's Law: An Introduction

Intel co-founder Gordon Moore observed that the number of silicon transistors on a computer chip doubles every year while the costs are halved. Moore's law suggests exponential growth in the power of computer chips, feeding innovation.

The "Silver Tsunami" of senior population growth should likewise be fueling exuberant innovation throughout the Aging Services Industry.

In these materials you will hear from:

- Scott Girard on the ultimate guest experience.
- Adriane Berg on “lensing”- the art of experiencing any environment or project through the eyes of your residents/guests or other end user.
- Peter Anderson on making every change cost effective and getting every ounce of ROI from innovation.
- Brad Smith on actualizing your ideas and getting the job done.

Then you will be asked to tell your own story and contact us to help you make a lasting and lucrative shift.



THE CONCLUSION BEFORE THE START

We created this e-book as a batch rather than a team, each of us seeing independently what ONE important point we felt we must make to help you become an agent of change. We surprised each other in the approaches we took, which revealed 4 distinct concepts, each of which breaks the mold, and together are a powerhouse of increased ROI.

These are:

1. Scott's Themed Environment
2. Adriane's Lensing Process
3. Peter's Return on Intent
4. Brad's Warranted Investment

If all or any of these are new to you, so much the better.

LAST WORD, BEFORE THE START: WHY SO MUCH ABOUT BOOMERS?

by Adriane Berg

Boomers (born 1946 through 1964) comprise 78 million US citizens and 1 billion people worldwide. Older adults, less demographically defined, are those from approximately age 70 through 100 and above.

Both of these groups have distinctive needs, both physical and psychological, with differing consumer habits and cultural views.



Image by Brad Smith

As caregivers to older parents, the boomer market often influences the older adult market. Your company's end-user may not be your purchaser, as the caregiver/adult child may be purchasing for an older relative. Conversely, your company's purchaser may not be the decision-maker, as the older adult may pay for their own residence, products or services, but looks to the boomer influencer to make a decision with regard to their lifestyle choices.

Especially with regard to the choice of assisted residence, the boomer is highly influential in the decision. In the case of mental incapacity, a family member may be the sole and legal decision maker. It is imperative that their view of your residence, as well as that of the older adult, be fully understood by management, staff, designers and those that create programs.

BREAKING

THE MOLD

PART 1: *The Centrality of the
Guest/Resident Experience*



THE BUILT ENVIRONMENT

THE NORM

INNOVATIVE SPACES SUCH AS STATE-OF-THE-ART GYMS, GARDENS AND CREATIVE ENVIRONMENTS, BUILT TO ACCOMMODATE A POSITIVE ACTIVITY, SUCH AS EXERCISE OR DINING

BREAKING THE MOLD

TELLING A STORY THAT ABSORBS THE GUEST/RESIDENT AND TAKES THEM ON A JOURNEY WITH THEMATIC TOUCHES TO COMPEL ENGAGEMENT AND INTERACTION WITH INDOOR AND OUTDOOR SPACES

THE BUILT ENVIRONMENT

By Scott Girard

Based upon my thirty-plus years of experience in and around Walt Disney Imagineering, as well as the body of my subsequent work which has taken me all over the globe, it seems to me that the line between design of public spaces in the commercial development industry and the entertainment industry has been fading since the last decade of the 20th century. Illustrated and implemented so eloquently by my old boss, Walt Disney, theming of commercial projects has now evolved into a prevalent method of designing projects throughout the world. As a master storyteller, Walt's recipe for success in themed environments was grounded in his fervent belief that a visitor's entire experience must be rooted in both "the story" and the accompanying built environment. The story gives the project a reason for its existence and meaning, and the built environment supports and reinforces the experience. As such, every aspect of the project must be filtered through, and thoroughly tied to "the story" AND the built environment.

FAST FORWARD to today and we witness the tidal wave of roughly 75 million Baby Boomers that are leading the country through a sweeping societal change. About 3 million baby boomers will hit retirement age every year for the next 20 years, and will affect market demands for senior living facilities, campuses, and communities not to mention healthcare and memory care for decades to come. In general, the boomers are bringing with them a passion for an active lifestyle, a demand for entertainment and dining options, engaging cultural activities, a profound sense of service, and desire to give back and contribute to their community. In addition to these lifestyle characteristics, we are seeing a demand in terms of the environment into which boomers retire. They desire a nature-rich environment that is secure and possesses components to which they can relate. A place that is in tune with their story...indeed, their life story.



CREATING A 'MAIN STREET'

Walt Disney theme parks often evoke a warm and fuzzy feeling in their guests, and that's largely by design. But it doesn't take film-quality special effects or a theme park budget to create that atmosphere. In fact, with just a little guidance, most senior living providers can conjure up a similar experience in their own communities.



CASE STUDY

Take, for example, Disney's Main Street, U.S.A., an attraction that doubles as a feast for the senses. Visitors can smell popcorn, hear ragtime bands and see an old trolley roll down the street—all in their first 30 seconds after entering the theme park. As you walk down Main Street, the entire notion of that experience is that it's a safe space, it's a secure place. That's all meticulously planned. And it's at the heart of the guest or resident experience.



The coming tidal wave of Boomers grew up at the dawn of the theme park experience. Outside the theme parks, you began to see themed shopping centers, dining environments...and that is what the Baby Boomers are expecting in their retirement years. But remember, before you have a theme, you have to have a story.

Telling the story...creating the experience

Much like a themed resort or commercial center, senior living facilities as well as senior living campuses can orient themselves toward a specific lifestyle, unique cultural differences, or attempt to create a depiction of historical environments, all working to create unique attributes and experiences for the residents.

Boomers tend to define “aging well” as having good health and finances, but there is more to the equation. It means that people need to feel a handful of emotions on a regular basis, feelings not achieved through health or finance. Boomers have involved family situations as members of a sandwich generation and thus will not be living in isolation. They possess a deep emotional attachment to their homes and to their gardens, both of which embody so much of who they are and what they have worked for in their lives to this point. Thoughtful research based design can indeed enhance their lives through providing familiar elements that capture a memory or activity to which they can relate and actively engage.

EFFORT

Creating a themed project requires an intensive effort. Visions must be generated, cast, and maintained for a significant period of time; from the outset of the concept, through development and construction, and into the operational phases of the project. Everyone on the team including the owner, the development group, the creative team of planners, architects, landscape architects, interior designers, graphic professionals, sales & marketing personnel, and management staff must be committed to the vision and remain on-track for a themed project to become a resounding success. Projects of this nature require expertise and commitment at every level.

AESTHETICS OF PLACE



The aesthetics of the building and grounds of a senior living facility needn't be institutional in nature. Indeed, senior living campuses are embracing architectural and environmental themes that offer distinctions from one property to another, while attracting potential residents with a strong identity or 'brand.'

Often developed for a particular niche, a project's activity offerings can reinforce a specific theme. Utilizing the natural terrain to influence a themed project can complement surroundings, while creating a sense of community or enhancing unique local or regional attributes. Theming also aids in maintaining continuity throughout the development, especially one created in phases.

We have a client whose family roots are in Italy. Their senior living facilities and campuses embrace a Tuscan theme. As landscape architects, we support that theme with landscape design features commonly found in the Tuscan region of Italy – a few rows of grape vineyard in the landscape, a variety of herbs used as landscape plants, and lemon trees in large pots that adorn stone patios.

The stone "carpet" of these outdoor retreats is warm both in color and texture, and ties all the various garden components together. Heavy wood and iron furnishings adorn the seating areas and near the small quiet fountain tucked neatly into the vegetation in the corner of the garden. Terra cotta pots of various sizes punctuate the scene with their content of hardy herbs, flaming geraniums, and flowing bougainvillea.

This is an immersive example of how "the story" and the built environment come together to create the experience.

Perhaps more importantly as landscape architects, we have experienced and understand the rhythm of life in Tuscany. It's a life where there is time. Time to savor all the flavors, aromas, and scents of the traditional Tuscan way of life. Time to bask in the quiet peace of intimate garden spaces defined by low hand-stacked stone walls, and informal plantings of olive trees, pine trees, Italian cypress trees, rosemary, thyme, and lavender, all visually contained by a border of native rock. Time to enjoy a casual gathering under the gentle shade of a vine drenched pergola. Time to watch the sun move across the vine covered stone and stucco walls of the buildings.

#2

THE EXPERIENTIAL ENVIRONMENT

THE NORM

HEARTFELT EFFORTS TO PROVIDE ENVIRONMENTS FOR CREATIVITY, SOCIALIZING, LIFELONG LEARNING AND INTERGENERATIONAL MENTORING.



BREAKING THE MOLD

EMPOWER CONSTITUENTS
CREATE THE EXPERIENCE FOR THEMSELVES;
PROVIDE TOOLS AND FREEDOM TO BRING THEIR OWN SKILLS TO THE ENVIRONMENT,
FOSTERING SELF DETERMINATION,
CONTROL AND MASTERY.

POSITIVE DEVIANCE & THE COMMUNAL EXPERIENCE

By Adriene Berg

In 1990, Jerry Sternin, director of Save the Children in Vietnam, sought to solve the problem of child nutrition in several impoverished villages. He did so by identifying the well-nourished children and helping the community model their mothers' feeding behaviors after the food choices of mothers whose children were well nourished. These women were the "positive deviants", acting differently from the norm in finding their own solutions.

To break the mold in elder communities the usual primary process is to ask questions. Why not ask these questions of your staff and residents?

- Who is participating in our offered activities?
- What form does healthy and continuous positive action take?
- Is there a member of the community that could take leadership as a positive deviant and show others how it's done?
- Does a resident who makes continuous contributions to the outside community have any special tools, resources, access, or personality traits that others can access or model?
- Are his or her caregivers giving special support which can be taught to other caregivers?

Unfortunately, congregate facilities often emphasize uniformity, discourage individuality, and are not fertile ground for the positive deviant to work his or her magic. Yet, the ROI on identifying and encouraging this is so high that it would be worth any Activity Director's time to evaluate the organization from the positive deviant's point of view.

BREAKING

THE MOLD

PART 2: *Lensing*

By Adriene Berg

WHAT IS LENSING?

Pretend to be in these situations:

1. You are at a spa and your glasses are in a locker down the hall. The masseuse asks you to sign a legal release of liability and an allergy statement. But, you can't read because the print is too small. How do you feel?
2. You just moved into assisted living and are watching the gardener, whom you do not know, planting roses. You are a master gardener and know he is planting too shallow and by next year hundreds of bushes will die. What do you do?
3. You are in rehab for a leg break after a fall. You miss doing chair yoga, which you did twice a week with friends. Other folks at the rehab seem interested. How do you start a group at the rehab center?

Your constituents are placed in these situations every day. Walk in their shoes and you will instantly see how to make their experiences better.

LENSING: \ lenz-ing

verb: to see the world from the lens of another and making the environment right for their experience so every day is one of ease, dignity, creativity, wellness, and fun.



Lensing takes place from the bottom up – your staff is your field force for lensing. Executive attitude must create an organizational culture in which lensing and the changes it will engender can thrive. In turn, COOs must be convinced that these changes will increase the ROI.

DIALOGUE IN THE DARK – LENSING WITHOUT EYES

DIALOGUE IN THE DARK is a program designed to lens a world without sight. In over 40 locations throughout the world, blind guides help you master their environment. Millions of visitors have been guided through exhibitions in absolute darkness. Among the most outstanding experiences is the Blind Museum in Holon, Israel, where you can walk in the park, visit a café or go about a daily routine during which the sighted become blind and the blind are the guides.



With the success of Dialogue in the Dark has come a new lensing adventure, Dialogue with Time. Young people experience what it means to be old and create an inter-generational dialogue to change preconceived notions about aging. Here the guides are 70 years of age and older and create an intense emotional identification experience. Reports of extreme emotionality during the dialogue are consistently made.

For staff in congregate communities, lensing can be a seminal moment, where they have their own inner dialogue with how they see aging, then break the mold through complete understanding with the people they serve.

“There's no one here who isn't going to phone his/her Grandpa or Grandma today.”

-“Y.”, 15 YEARS OLD, SUMMING UP HIS PARTICIPATION IN DIALOGUE WITH TIME

HOW TO LENS

If boomers or older adults are your markets, lensing is a critical part of your bottom-line success. Imagine understanding every aspect of your business, facility, product, or service through the eyes of your target market. Lensing can be a meticulous thought-provoking process, with guidance from an outsider who sees your environment with a fresh eye. But, for an easy start on your own, follow these 4 steps:

#1

APPOINT A LENSING MONITOR: Have one to three point persons to execute the next two steps and report on what they find.

#2

HAVE YOUR LENSORS TAKE A STROLL: Lensors need to look at all aspects of the environment through the eyes of the people they serve. Lensors must play the same games, sit in the same chairs, walk through the same gardens, participate in the same activities, confront the same barriers and enjoy the same gains.

#3

ASK, ASK, ASK: Once Lensors observe a deficiency, they need to confirm what they believe. It is easy to miss issues. If a Lensor has no trouble seeing, hearing, walking, communicating, they can miss issues that are important to those that do. It is very easy to ask the right question, no fancy poll is needed. Simply ask residents or clients: **“What are we missing?”**

#4

CALL A LENSING MEETING: After a Lensing report is made, ask the team how changes they suggest would fit with the cultures and branding of the organization and be incorporated in marketing as well as design.

CASE STUDY: LENSING A FAMOUS SPA AND WHAT WAS MISSED

A famous spa catered to boomer women largely between the ages of 55-80.

They missed:

- ✓ the issues of lighting
- ✓ client embarrassment at stating health status
- ✓ the possibility of clients falling while getting to treatments rooms.

Here is an excerpt from their Lensing report.

“There are at least three opportunities to unobtrusively ask a spa client about their special needs. First, when they book an appointment, next when they come in for the appointment, and last just before a treatment. You may prompt them by asking about special needs, pain points, allergies, medications.”

At present, THE DAY SPA asks about needs on a registration form, and again before a treatment by the body worker.

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The average 50+ client will need reading glasses to see your registration form. The DAY SPA typeface needs to be larger, a suggested font of at least 14 points. Have a handy basket of reading glasses of various levels behind the desk at registration.



Make sure the logistics are no surprise for the first-time guest, and give them a room choice whenever possible. This may be a feature of the website with a virtual tour of the facilities. Virtual tours are one way to present mobility information without singling anyone out. It also makes it fast for busy staff to inform the new client by simply requesting they look at the site to get acquainted with the layout.

REGISTRATION

At present, THE DAY SPA asks about needs on a registration form, and again before a treatment by the body worker.

TREATMENT ROOM ACCESSIBILITY

Since a percentage of your treatment rooms require going through an outside pathway, and some require steps, they are not accessible for most people with mobility issues. For clients with no such issues, the logistics still pose a bit of a hassle.

CASE STUDY: PELICANO BAY, ROI & LENSING

On one of our retirement community projects, Pelicano Bay, we had the advantage of being called in at the strategic plan phase. We saw that the developer intended an expensive golf course planned by a famous golf course designer. The project would add millions and engender much push back from local and perhaps international environmentalists.

Pelicano Bay Mexico is called the Galapagos of Mexico, and concerns for the terrain and wildlife run deep. What the project was missing was an analysis of what the California expats and Canadian snow birds really want.

After meeting with the publisher of the local expat newsletter and many other focus groups, we determined that “glamping”... glamorous, luxury camping ... a free local activity with very high ROI... was more of what they desired.

CHECKLIST: DO YOU ALREADY HAVE AN INKLING OF WHAT IS MISSING?

Are these opportunities currently available at your facility?

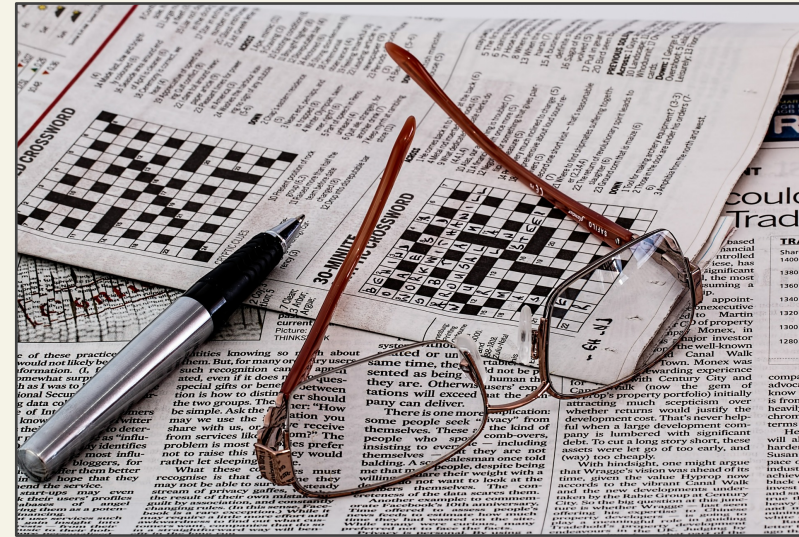
- | | |
|-----------------------------------|--|
| ✓ Play | ✓ Travel |
| ✓ Creativity | ✓ Technology |
| ✓ Contribution | ✓ Physical Beauty |
| ✓ Networking | ✓ Active Spectating |
| ✓ Business and Entrepreneurship | ✓ Physical Activity/Wellness and Sport |
| ✓ Intergenerational Relationships | |



Skip the expensive and potentially litigious golf course. Purchase glamping tents and offer a guided experience to potential purchasers as part of the marketing effort.

ARE YOU LENSING THE RIGHT CLIENT? FOOD FOR THOUGHT

As a consultant to a major senior meal producer, I was asked to determine why the sales campaign was simply not working. The campaign featured pictures of well-dressed seniors socializing around good food. But, the target client was mostly social workers who had made their careers in some aspect of food buying for senior communities or facilities. These folks did not serve affluent, healthy and active individuals. They often were buying bulk food programs for poverty-level seniors. When I asked my client what problem he could solve for this group, he answered: “I am very concerned with meal fatigue. That’s why I have so many ethnic selections and salt substitutes to give some taste and variety.” Once we changed the branding, emphasizing how the company solves the problem of meal fatigue, a problem well-recognized by the social workers, sales soared. It was obvious that the original marketing program gave no thought to the actual purchaser.



Are You Missing Play And Contribution?

Play is one of the essentials of successful aging. It is underappreciated and under subscribed in environments for older adults. The lack of opportunity for play in today's adult environment is dangerous to longevity and counterproductive to our happiness. Of course, most activities directors believe they are infusing play opportunities in the lives of residents. Bingo, games, solitaire, word games are not uncommon in adult environments. But, they are routine approaches to an essential and more complex need that feeds the human spirit, regardless of age.

ESSENTIAL COMPONENTS: ENVIRONMENTS FOR CONTRIBUTION

Offering volunteer opportunities is good business. You can make opportunities for “significance” part of your brand.

Here are the essential three components:

#1

OPPORTUNITY. Case in point: Sunrise Senior Communities, US, Canada, UK. As much a part of the built environment as walls and floors, today it all starts with the website. Sunrise takes residents on a virtual journey, giving ideas as to how and where to volunteer.

Not ready to redo your website? Simply offer frequent listings of volunteer opportunities on a bulletin board that is easy to read, well lit and centrally located. Create newsletters with suggestions. Provide in-house training sessions on “How to Become a Volunteer.”



#2

ACCESS. Case in Point: Chabad of Hunterdon County. Chabad of Hunterdon County has developed a multi-generational approach to getting to a volunteer site. Driving-age teens and young adults offer to drive volunteers. Affinity organizations like Elks, American Legion and the Rotary Club are often open to starting a “Driving-the-Volunteer” program in partnership with your facility.

#3

RECOGNITION. Case in Point: Good Grief, Morrisontown and Princeton, NJ. Good Grief dedicated facilitating the grief of children who lost parents, has masterful ways of rewarding volunteers. They hold annual thank-you dinners for all volunteers and award ceremonies for those who have served for several years. When a volunteer “retires” from the program, the other volunteers perform the ritual of giving tiny tokens of appreciation and recitations that the volunteer will always remember. You can emulate these “reward moments” to supplement any thankyou programs their individual non-profits may provide.

CASE STUDY: AFFINITY LIVING

Affinity Living is using the built environment to generate relationships. Older adults are vulnerable to a disease known as “loneliness.” Make no mistake; it can kill. It can also make us reluctant to move to assisted living or other congregate facilities, even if our home is no longer suitable for us.

To break the mold, you must create a “beckoning or affinity environment.” Such an environment is designed to foster friendships from inside and outside the community.

For the boomer, build your spa and health facility near the entrance to the property. Make these sites active with health and exercise classes. Affinities will result naturally as people discuss their vitamin regimes, their travel adventures and other boomer-centric topics.

Environments for Affinity Lifestyles

The challenge is greater for the older adult, the less mobile and the cognitively impaired. In new environments and even at home, there is very little naturally-occurring social support. Regulated classes, set “activities” don’t always cut it. It’s true that friendships eventually ensue, but, the prospective resident does not believe that until it’s experienced. Beckon them.



*Design: Witherford Watson
Mann Architects
Location: Bermondsey,
Southwark, London, England*

Break the mold by looking backwards to ways that older societies included their elders in the everyday life of the community. In the Bermondsey district of London, there is a new community for the aged based on the 19th century almshouse. These historically housed poor, but this one has a glass exterior and a courtyard where everyone is welcome.

CASE STUDY: NYC

New York City may have inadvertently created age-friendly spaces when the city required builders to set aside small seating areas with food service and greenery as a pre-requisite to building.

The result is an ad-hoc, unplanned communication area for daily multi-generational chit-chat.

Ask a lonely elder and they will tell you that they sit at McDonald’s, sometimes for hours, nursing a coffee to “strike up conversations.” Some years ago, I lensed the ladies room at Saks 5th Avenue and found the same phenomenon. I wondered how to duplicate the “ladies room panache.”

It’s not hard.

Give the sitters something to do. Eat, barbeque, but make it a tech-free zone. Yes, it may fail to attract young tech addicts, but sitting next to a millennial on their phone or tablet does not thwart elder loneliness.

**AND THAT’S THE POINT OF
BREAKING THE MOLD.**

BREAKING

THE MOLD

PART 3: *Cost and ROI*

By Peter Anderson

COST & RETURN ON INVESTMENT: FUNCTIONAL OBSOLESCENCE

As a consultant to the Hospitality, Spa and Wellness industries for the last three decades, acknowledging and avoiding functional obsolescence is one of the chief cornerstones of remaining relevant. Hotels sell much more than places to eat, sleep and recreate. They sell fantasy, fun and experiences... Why shouldn't we do the same in mature living environments? Carpets, computers and customer engagement all have a useful life span, after which they are replaced, renovated or repurposed. It is not only reasonable, but it is a Darwinian necessity to either evolve or "die". As the Boomers come of age and make decisions about how they may want their parents to live the balance of their lives and even more so how they want to live theirs, this trend becomes increasingly important.

Newly-built environments often want to be known as that property with the "latest and greatest", while older hotels and resorts scramble to squeeze into the real

estate "spanx" to keep up with the flashy new products entering the market. Be it a newly-built or a newly-renovated property, each wants to invest as little capital as possible while creating the highest level of returns on said investment. Finding that sweet spot is much harder than it appears to be.

Those resorts that have been successful are the ones that examine the needs of their guest/resident experience and stay true to their brand values, modifying and incorporating technology, design, textiles, public spaces, food and beverage offerings, and other features to enhance their offering to their market(s). Fad-driven operators often find themselves chasing the illusive next "latest and greatest", spending a disproportionate amount on capital investments all the while confusing their brand message and falling short on their expected returns.

CASE STUDY BOOMERS & BURGERS

On April 15, 1955 Mc Donald's was "born"; inflation aside, a family of 4 could dine on a dollar and get change back - a disrupter or a mold breaker from the malt shop mentality, pervasive in the 50's. The oldest boomers were just 9 years old. As they matured, so did their taste buds, their financial resources, and their love of burgers. By 1969 Red Robin and Wendy's entered the fast food market. Square burgers, salads and multiple toppings were signature items of these chains. The Boomers were 33 and taking kids to these establishments. This industry continues to evolve and includes burger establishments that sell everything from meatless burgers, to patties that contain 50% bacon. With just a toe in the waters of their 8th decade, the front-edge boomers take their grandchildren (and themselves). Shouldn't we think of our environments, like the evolution of the American Hamburger Restaurant... a straightforward product with infinite permutations... responding to market needs.

COST & ROI: FUNCTIONAL OBSOLESCENCE

While functional obsolescence is often and easily viewed from a design and real estate perspective, it can also be part of the attitude and approach to operational issues. Knowing ‘who you are, who your stakeholders are and what trends are meaningful are key in avoiding the pitfalls of following the fads and ignoring the fashions. To gain maximum return on one’s investment we need to do our homework, understand our clients, be mindful of social and technological trajectories, surprise and delight our stakeholders with more than they expected.

If the hotel industry is focused on Functional Obsolescence, and their guests have an average length of stay of 3.7, days isn’t it reasonable that Senior communities (where the average length of stay can be years) be as well?

A Tale of Two Hotel Companies...

Doing it wrong, doing it right and learning from the market.

With the advantage of hindsight, I will take this opportunity to showcase two hotel companies that have examined their respective markets and made bold decisions to move forward.

CASE STUDY #1: BRIGHTON GARDENS

In the early 90’s **Marriott Corporation** shifted their corporate focus from building hotels to operating franchises. Part of their new vision included entering the Senior Living Market with a concept called Brighton Gardens. With a multibillion dollar portfolio who better to have expertise in creating living and dining environments? By the end of 2002 a competitor purchased Marriott’s 126-property portfolio located in 29 states with a resident capacity of 23,157. Their fatal flaw, they built buildings remarkably well, but had little understanding of what their residents actually wanted or needed. The environments had no community.

CASE STUDY #2: EVEN

Fast forward to 2016:

InterContinental Hotel Group launches EVEN a wellness hotel complete with rooms, amenities, menus and programming tailored to their guests’ lifestyle needs. This hotel was designed from the inside out, starting with the guests and ending with the structure.

“*An intimate knowledge of what a market wants is key to creating an environment that provides the proper ROI.*”

HOW TO MAKE A HIGH ROI PLAN

CONCEPT OF RETURNS

While ROI often reflects Return on Investment, there are several ways to evaluate and interpret the concept of returns. Classically, the purpose of the return on investment (ROI) metric is to measure, per period, rates of return on money invested in an economic entity. In marketing, ROI is evaluated by subsequent sales or new customers, reflecting expanded brand awareness.

This calculation helps a group to decide where to put their operating or development capital and what they should expect as the benefits. When the benefits are classically defined in solely financial terms, those investments which yield the highest returns are prioritized over those that don't. There are, however, other benefits that contribute to financial success in a less empirical, but sometimes more meaningful way. To that end, we invite you to examine the expanded ROI - Return on Intent.

In this capacity we are not suggesting one forego looking at financial returns in favor of some esoteric, emotionally-invested, socially-motivated programs to curry favor with hipster seniors. Rather, this investment analysis is far more complex as it takes the math required in a financial ROI calculation and overlays the social algorithms... the mold breakers.

These mold-breaking moves may appear cavalier to an outsider, but they are based in deep, deep market research and provide a turbo-powered return for those willing to **play the long game**.

ATTITUDE & INTENT

I think we might all agree, intention is a very powerful thing. [Dr. Masauri Emoto's](#) work evaluated the crystalline structure of water that was “pure” and some that was polluted. The polluted water had misshaped asymmetrical crystal structures, whereas the clean, pure spring water had balanced geometric symmetries to it. Further, when the water was infused with positive or negative intent the crystalline structure responded accordingly.

Photo Courtesy of <http://www.masaru-emoto.net>



Love

Thank you

I hate you

COST AND ROI: RETURN ON INTENT

Every business has intent and hopefully one of the first components of your intent is to be profitable. Your expenses should be less than your revenues so at the end of the day you have made a profit. But it is important to remember this profit is better achieved with the alignment of core values and intelligent, strategic and mindfully crafted operations. This is a four-step process:

1. Defining values
2. Hiring and Training to them
3. Evaluating successes and failures
4. Incorporating your knowledge and insight and repeating steps 1,2, and 3

Having an operation with core values, supporting them in employee selection, and training to them costs money, but not significantly more than operating a senior living facility absent them. Morale will increase, turnover decrease and overall guest/resident experiences will be enhanced. As a manager, profitability can be enhanced by following simple steps.

- ✓ Profitability before Philanthropy
- ✓ Walk your talk
- ✓ Transparency, but with boundaries
- ✓ Incentivize individually and as a team
- ✓ Cost Control Counts! Key Performance Indicatorss, manage expectations
- ✓ Over invest in your line employees; they are the face of your facility

In operations, there will always be unplanned situations that require fast-on-your-feet thinking. Know that you can control your employees to a much greater extent than you can the residents, keep the following points in mind.

- ✓ Employees are your internal customers
- ✓ Invest in your staff's wellbeing
- ✓ Build a Family
- ✓ Create and Enforce Standards and train on them
- ✓ Cross train, Cross train, Cross train
- ✓ Have Employee's back-of-the house environments comparable with the front of the house (capital expenditures)

For the community in which you operate, remember “no man is an island.”

- ✓ Utilize your property management system to the fullest, know everything you can about your community and its members.
- ✓ Read resident's intent – teach your staff to do it
- ✓ Anticipate and Pamper – rinse, repeat
- ✓ Engage with residents on an emotional level with integrity
- ✓ Create spaces for internal exploration – inspire all
- ✓ Build Community

BREAKING

THE MOLD

PART 4: *Cooking with a Proper Recipe*
Avoiding the “Unbuilt Project” Award

By Brad Smith & Scott Girard

COOKING WITH A PROPER RECIPE

HOW TO AVOID RECEIVING THE ‘UN-BUILT’ PROJECT AWARD

Throughout my career I have worked with scores of wildly creative individuals. One colleague stands out in my memory because we only collaborated on projects during the conceptual phase of design. The reason we never worked together beyond the conceptual phase of a project was because his projects never progressed beyond their conceptual phase. His creative ideas, while seemingly cutting edge, offered exciting and engaging spaces of themed and mixed-use development with entertainment, retail, dining, and residential components. The project’s renderings provided stunningly fantastic windows into my colleague’s vision. And then the client would ask, “What’s it going to cost?” Not long after the question, the soft chirping of crickets would inevitably be heard.

“If You Build It They Will Come”

That quote is the famous line in the classic 1989 film, “Field of Dreams.” When Iowa corn farmer Ray Kinsella (played by Kevin Costner) starts hearing voices to build a baseball diamond in his fields — sacrificing all the income from his crop — everyone thinks he’s gone mad. He has. Sort of. And while the quote leads to some very heartwarming outcomes in the film, it is

patently bad advice for any development in real life.

There is much more to thoughtful and sustainable development than flashy renderings and catchy movie quotes which are based upon emotions. Arguably, the most important step in the Due Diligence phase of project development is the Feasibility Study. The two main components of the Study are Market Research and Financial Feasibility. The market research will indicate WHAT should be built, and Financial Feasibility will indicate HOW MUCH should be built. Together they determine the level of Warranted Investment required to ensure the financial success and sustainability of the project. The number one reason development projects fail is because of inadequate planning.



WHAT IS MARKET RESEARCH FOR A DEVELOPMENT?

Market research is a detailed and objective evaluation of the potential of a new development. It is a comprehensive analysis of gathered data regarding environmental forces, market trends, demographics, entry barriers, competition, risks, opportunities and the project’s resources and constraints. Once the analysis is complete, the data is reviewed to identify trends.

WHAT IS FINANCIAL FEASIBILITY FOR A DEVELOPMENT?

To ensure that the development provides a certain level of profit, a financial feasibility study is undertaken during the initial due diligence phase. The sole purpose of this study is to determine the numbers and to evaluate a financial return from the development.

WHAT IS A WARRANTED INVESTMENT FOR A DEVELOPMENT?

The level of Warranted Investment for a development is usually driven by the results of both Market Research and Financial Feasibility. It reflects the level of investment required to ensure the financial success and sustainability of the project.

Warranted investment is used to help determine a project’s potential size and capital structure based on estimated cash flow. This discounted cash flow, or capitalization analyses, provide indicators of warranted investment.

The first step to avoiding an “Un-Built Project” award is to never allow the design to drive your project. Your project should always be grounded in reality from the earliest possible moment. Market and financial analysis will result in a sound warranted investment strategy, which will ensure the financial success and sustainability of the project.

So, as they say in the financial world, “Here is the bottom line” – *market and financial feasibility evaluations focus on testing project viability, enhancing sustainability, and contributing to long-term success by providing feedback to the project plan, design, and operating strategy.*

PREPARING A COMPREHENSIVE STUDY

Preparing a comprehensive study takes a considerable amount of time and effort, but once completed, serves as a project guide, not only for the developer but also for the development team. The preparation of the development feasibility study provides the following benefits:



#1

PROVIDES AN ‘EARLY WARNING’ MECHANISM: This is the most important aspect and it is imperative that you can ascertain if your deal stacks up. The pre-development assessment will determine an approximate profit and will save you from wasting your time, efforts and money.

#2

ALLOWS YOU TO TEST VARIOUS CONCEPTS: Cost overruns can cripple a development project. A systematic development assessment allows you to make mistakes on paper, rather than when the project is completed.

#3

PROVIDES A LEVEL OF CONFIDENCE MOVING FORWARD: A thorough feasibility study will increase the developer’s confidence in his or her ability to proceed with the development. Sometimes, it may even compensate for a lack of experience if the concept is sound and there is good demand for the product being developed.

#4

PROVIDES A FINANCIAL VIEW TO THE HORIZON: Development feasibility shows the level of finance required and for how long. Under capitalization and early cash flow problems in a project are two major reasons new developments fail. Feasibility analysis also allows you to convey your ideas to bankers and potential investors, to help them understand and appreciate the reasoning behind your ideas.

BREAKING

THE MOLD

PART 5: *Taking the Next Steps*

TAKING THE NEXT STEPS BECOMING A MOLD BREAKER

You inherently know that the tsunami of Boomers reaching retirement age can become a game-changer for your organization. To embrace a Boomer-Centric Paradigm, you must become Experience-Based. You need to develop High-Value / Low-Cost initiatives, that focus on User Needs. Everything you do must be grounded in the world of warranted investment and financial feasibility.

At the end of the day, assisted living, continuing care communities, and adult residences are a home for the people that live there. We help the owners and developers think through food shopping and deliveries, transportation issues, large-scale sports equipment and gymnasium requirements, swimming pool safety and fitness, lifelong learning programs, travel clubs, digital health programs and equipment, and connective technologies such as video conferencing and other technologies i.e., digital safety, monitors and sensors, tracking and GPS personal systems.

WHERE TO GO FROM HERE:

ENVISIONING: Bring us to your site for an intensive, one-day on-site deep dive into your situation, designed to help you see new possibilities and maximize your senior living community.

EXAMINING: Based on the findings of the Envisioning process, we will begin to analyze further for you. This level involves a more comprehensive investigation, including financial modeling.

PARTNERING: In a long-term Partnering Engagement, we serve as your “trusted advisors,” guiding you through the process of new project development, expansion, or repositioning.