



Meeting  
summary and  
action plan  
Strategies  
that create an  
environment for  
wellness

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## **International Council on Active Aging®** *Changing the Way We Age®*

International Council on Active Aging has been leading, connecting and defining the active-aging industry since 2001. Founded in the belief that unifying the efforts of the organizations focused on older adults benefits both the people they reach and the organizations themselves, ICAA's vision is shared by over 9,000 organizations.

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## ICAA Forum

In 2005, International Council on Active Aging® envisioned an invitation-only meeting that would bring together thought leaders from many organizations—both private and public—to form a think tank that would develop strategies to turn the challenges facing providers of health and wellness services into opportunities.

Since then, these meetings have helped to forge connections among industry leaders within all areas of senior living, therapy, wellness management and corporate wellness, while promoting understanding and action around the ultimate goal: health and quality of life as people age.

As a think tank of thought leaders representing many organizations, the issues and ideas generated during the ICAA Forum are the first step in identifying actions that can be taken to enable the active-aging industry to best serve the well-being of their current and future clients.

### ICAA Industry work flow

The ICAA approach is to identify issues and possible actions at the ICAA Forum. Next, recommendations are commented on by the association's advisory boards, and ICAA's staff evaluate the input in relation to ICAA's mission and available resources. Once a topic area is prioritized, work group(s) are formed, often including ICAA Forum representatives and advisors. The results are then reported back to the ICAA Forum and disseminated to the industry.

### Work flow



## ICAA Forum 2014: Strategies that create an environment for wellness

“Wellness” and “active aging” are global terms describing the right and capacity of older adults to live fully and well. These concepts counteract the assumption of decline and replace it with the presumption that throughout the aging process people can learn, maintain or improve physical ability, work, and provide significant societal contributions through, for example, teaching and caregiving. Shifting from a medical model to a culture where productive lifestyles and prevention are encouraged is an overriding challenge for organizations.

### Development of the ICAA Forum outcomes

The **purpose of the ICAA Forum 2014** was to develop **actionable recommendations** that many organizations can use to create and/or enhance the environments that are necessary to support wellness and quality of life for older adults, no matter what sector of the industry.

The delegates to the ICAA Forum included representatives from both public and private sectors who have an interest and passion for addressing mutual challenges, forging connections and promoting understanding around the common goal of improving health and quality of life as people age.

Three strategic areas that support a wellness environment, confirmed in a poll completed by organizational leaders, were the focus of the meeting.

1. Defining a “culture of wellness” in terms of the attitudes, perceptions and beliefs of staff, residents and others, which is the foundation for a wellness environment.
2. Developing ideas for staffing practices that orient, align and enable staff buy-in to a culture of wellness.
3. Identifying attributes of the physical environment that enable and reflect an organization’s commitment to promote a culture of wellness.

To guide this discovery process, ICAA looked to Tom Kehner of theDifference Consulting to facilitate the day. Through an iterative process, the delegates addressed each area (culture, staff, physical environment) individually and in teams.

The day launched with delegates choosing one word that would define active aging/wellness in the future. Gathered together, the words capture the future of active aging as well as the mindset that inspired the Forum.

As groups presented key points from their deliberations, their thoughts were captured in a visual format that tracked progress.



*Carmel Roques and Kay Van Norman share their team’s Top Stories after Scanning for Context.*

## Cross-cutting themes

Throughout the day, several themes emerged from the discussions:

- The lack of a consistent definition of “wellness” causes confusion, which holds back the progress of wellness culture and of the industry.

**Potential solution:** One approach is to define “wellness” and mount a campaign to get everyone in the industry to adopt that definition. The alternate approach is not to attempt to define wellness, but to accept how individuals and organizations are using the term and work from that base.

- Older adults must be involved in all aspects of the planning and delivery of wellness culture and programs. This integration is important not only to influence success, but also to move away from the “taking care of” and “we know best” attitudes that separate professionals from older adults.

**Potential solution:** Include current and potential residents and participants in all discussions involving culture and the physical environment. Ideation and planning sessions, focus and evaluation groups benefit when the older adults who will be served join in development.

- Outcomes for the industry are needed to show the benefit of wellness for older adults and for organizations. Both direct and indirect measures will help explain the value of wellness initiatives, as well as provide data that guides planning and implementation.

**Potential Solution:** Create, embrace and standardize tools that capture and report outcomes in these areas. Outcome measures need to be easy to use and time efficient while providing meaningful data.

- The people involved in wellness are the experts, and need to take a larger role inside and outside the industry. Otherwise, experts in the

medical model will define wellness in their terms, rather than in the terms the industry uses to reflect active aging and the dimensions of wellness.

**Potential solution:** Reach out to policy and planning groups offering to share expertise on wellness. Explain how active aging/wellness is an approach that can reduce healthcare costs, add to livable communities and bring resources to workforce issues. Promote the contributions of older adults to society at large.

## One word describing active aging/wellness in the future





## Scanning for context

To anchor the discussions in a shared base of knowledge, delegates took time to read the newly issued ICAA white paper “Key elements for developing a wellness program for older adults.” Participants also referred to the “ICAA Career Path for Wellness Professionals.” (Note: copies are available at [www.icaa.cc/business/whitepapers.htm](http://www.icaa.cc/business/whitepapers.htm)) Working in teams, the groups shared thoughts about each strategic area by extracting patterns and ideas based on their reading.

### Culture of wellness

- Promoting the culture of wellness requires improved clarity of language and top-down support of the culture change.
- The wellness culture means dignity of self, and an opportunity for self-fulfillment and happiness.
- Culture is a way of life, where purpose is key. Purpose is unique to each individual.
- A universal definition of wellness would help to build the culture.

### Staffing

- Staff members are critical to the culture; they are the superheroes who will take the industry through cultural change.
- Managers need to understand wellness to appropriately staff their organizations.
- Industry standardization of the role of wellness and staffing requirements will be important, as is measurement.

- Standards and measurement need to be balanced with personal skills and individual development.

### Physical environment

- Designed space must be flexible to accommodate the residents/older adults who today use facilities as well as the people who will use them in the future. Flexibility in design enables activities crossing multiple dimensions of wellness to share the same space.
- A long-term view is needed by the executive team and investors; we need to educate them about the industry and trends.
- People—staff members, participants, visitors—are also part of the physical environment, which means that what people see others doing will influence their own use of the environment.
- Environments need to connect people and cross dimensions so people have the opportunity to be totally engaged. In the future, technology can be one of the ways to connect people.

## Futurescape: Active

## Aging in 2025

Delegates were asked to visualize what active aging/wellness will look like when it is adopted and part of the larger culture. Rapid prototyping was performed in response to this scenario:

*“The 2025 White House Conference on Aging concluded today as delegates celebrated the amazing success that the active-aging industry has experienced since the 2015 WHCOA. Specifically, constituents from across the industry have worked together like never before to ...*

- *Define and sustain a Culture of Wellness,*
- *Establish effective Staffing Strategies, and*
- *Design the Physical Environments required to enable the culture of wellness.*

*Moreover, the White House is heralding the content developed at the ICAA Forum 2014 as a primary catalyst for driving this tremendous evolution over the past 11 years.”*

Members of the ICAA Forum 2014 team envisioned the following:

In 2025 a **wellness culture** is one focused on the individual, and supported by the people and physical environment within the community. Because of this, individual choices are not only accepted; but expected. Diversity is appreciated, planned for and supported. Wellness is bringing purpose, meaning and balance into the lives of those who embrace it.

**Wellness environments,** and the

components that create them, are based on education, and supported by professional staff and a person-centered culture. These provide the foundation and structure for collaboration, engagement, assessment and standardization, innovation and sustainability.

**In 2025 life stages,** from childhood through adulthood, are encircled by a wellness lifestyle that is supported by the community at large.

Among the teams these **words** were frequently spoken: collaboration, education, wellness, culture, circles, engagement and creativity.



## Design for action

With issues and opportunities identified, and future visions of active-aging/wellness consolidating individual and group ideation, the question was asked: “What are the areas that benefit from further development?” During a synthesis conversation, ICAA Forum delegates identified multiple strategic areas, and then chose to join small development groups. Following are their observations and recommendations.

### I

#### Physical environment

The problem with the physical environment is that it is already in place. It was designed for the automobile, for the young, for people who can see and hear and ambulate. We need to make the ramp and the traffic circle and audible signals when crossing the street acceptable.

#### Actions:

- Find the stakeholders who are instrumental to re-creating the physical environment. There are many groups already doing this in the public and private sector, find them and work together to develop accessible and engaging environments.
- Position ICAA and the delegates at the ICAA Forum as the experts in designing environments for wellness. This is a real opportunity because we already are identifiable experts and need to leverage that. Policymakers are not experts, but we are.

#### Driver:

- Create a subgroup within the ICAA that focuses on this area.

#### The tools:

- Leverage existing resources. There are studies, standards and policies for creating age-friendly communities. Find these, publish them, and give our members the resources.

#### The message:

- Physical environments can be adapted to support wellness, even in existing communities. This can be done with re-engineering and retooling, and looking at current spaces with an eye toward wellness.

#### Next steps:

- Partner with provider networks to assist them in redesigning environments specific for older adults.
- There are so many federal agencies involved in this (CDC, EPA, etc), invite their representatives to the applicable Forum meeting.
- Educate architects and developers about the value and methods to build environment for wellness that support the needs of older adults.
- Initiate more discussion on physical environments in relation to culture and staffing.
- Join planning groups.

#### Success:

Physical environments change to better address the older population... how do we assess this?



## 2

### Staffing within the wellness culture

The wellness culture affects everyone. Staff members include several generations, and they work with older adults in other generations. Training and coaching to understand the perspectives of different age groups can make a positive work environment. Older adults benefit when they are better understood by those planning and delivering wellness services.

#### Actions:

- Conduct research on the best tools to brand and embed the wellness culture. Perhaps write a paper on those best practices.
- Develop a plan to address the different generations that are in the workplace, which impacts health, the socio-cultural environment, and also the family. Considering that people are working at older ages, what needs to be done to develop expertise regardless of age?

#### Driver:

- Establish ad hoc groups to research best practices and to draft plans for serving the needs of the workforce.

#### The tools:

- Written plans and social accountability; succession planning.

#### The messages:

- Members of the workforce are the wellness heroes.

- Developing a culture never stops, it is an ongoing process.

#### Next steps:

- Executive development. What is the wellness strategy, and how is it included in the strategic plan?
- Develop a list of training resources for staff, and develop the elements of training.
- Onboarding, the orientation of new employees to the workplace, is part of career development. Build an effective onboarding process and tie it in to the annual review so results are more measurable.
- Training: Provide “ages of life” education so that the workforce understands what aging is all about. More sensitivity and diversity training. Add training on a hospitality, customer-centric model.
- Develop a social accountability plan. Have the associates/staff go into the community and be the ambassadors and really help the community at large understand about the diversified workplace and what the aging process is.

#### Success:

- When the senior team develops the strategic plan, wellness is incorporated throughout each area and all staff members and board members buy into the wellness initiative.
- Staff receive the training and professional development that enables them to integrate wellness culture into all their activities.

## 3

### Person-centric culture

In a person-centric culture, the focus is on listening to the voices of older adults and bringing each person's point of view into the dialogue. The older adults who will be served should influence choices involving the physical environment and staffing. In the future, the "retirement community" models, including CCRCs, need to change to stay relevant. Continually adapt the model because people change over the years.

#### Actions:

- Take prejudice out of perceptions of age and ability through education of both staff and older adults/residents.
- Identify a person's purpose for being in a community, their purpose in life, so they can continue that purpose and not stop or change.
- Ask the right questions. Listen. Individuals talk with one another, and staff members must listen to hear about the changing needs of a population.

#### The tools:

- Language is a really important element of communication.

- Recognize an individual's choice: Age the Way I Want To, Age Where I Want To. Older adults wish to maintain control of their lives.
- Use disruptive innovation to create new values and services that replace the older ones by focusing on the problems of individuals, not of the business. When the culture and services meet the needs of the target population, then the business likewise is served.

#### The message:

- The wellness culture is everyone's responsibility, not only the staff's. The role of older adults is to implement the wellness culture and staff members echo their lead.

#### Next steps:

- Use positive stories and the media to represent aging as a positive, active life stage.
- Adopt Blue Zone thinking to create healthy communities and promote that vision.

#### Success:

Success factors to be determined.

## 4

### Outcomes

We take it for granted that people are tracking the results of their work, but that is not accurate. A lot of wellness people are not tracking outcomes, which makes it challenging to prove the value of their work.

### Actions:

- Look for outcomes that are measurable and show return on investment (ROI) to the organization, such as utilization, quality of life, satisfaction.
- Present outcomes to the C-suite to gain more resources.

### Driver:

- ICAA is in a unique position to establish an industry baseline and standard, so companies are not creating individual, inconsistent tracking systems. This would enable organizations to compare what is happening in the industry.

### The tools:

- Current assessments that are already available.
- Data that may already be collected by companies, but is not being accessed by staff in the wellness function.

### The message:

- There are positive results from wellness programs and environments, which are demonstrated by the outcomes.

### Next steps:

- Develop a system to identify the profit and loss (P&L) from wellness. What is the cost of someone living in our communities? Is it different for levels of care? How does it change as they move through the continuum? Be able to tie a P&L back to utilization in the wellness program.
- Connect functional measures that are already available, such as the Senior Fitness Test or number of falls, to functional ability. For example, to levels of living (independent, assisted, nursing) in a retirement community.
- Make assessments and reporting systems user friendly. Easily reportable and easily analyzed.
- Questions asked of older adults need to come in a form that is short and easy to complete, with results that are very functional.

### Success:

- Communities (number to be defined) are regularly collecting outcomes and using them.

## 5

### **Change the perception of aging**

How people view the aging population—older individuals, family members, youth, policymakers, employers and other categories—impacts the environments where older adults live, work and participate in society.

#### **Action:**

- Create a “PSA” (public service announcement) that promotes positive images of aging.

#### **Driver:**

- ICAA is the vehicle to drive this campaign.

#### **The tools:**

- Diverse media outlets (TV, radio, public service announcement/campaign).

#### **The message:**

- Older adults have a lot to give.

#### **Concepts:**

- Provide experiential examples of people who are living a well life, showing opportunities for growth and development as individuals age. The images would be of regular people, maybe using an assistive device, still contributing. Not the super-grandma image.

- Draft aspirational and inspirational messages to get people off the couch. A couple of possible taglines: Aging Is Okay, Aging and Loving It.
- Synonyms for “young” still apply to aging adults; use these words rather than the negative words typically associated with aging.
- Call for action: Recognize opportunities to age well.

#### **Next steps:**

- Form a group to develop a plan.
- Identify the audience to target (e.g., older adults, families policymakers, professionals) and prioritize.
- Gather statistics/research to support the business case for a campaign. Develop cost estimates/RFP/business plan.
- To be effective, a media campaign requires a multimillion dollar investment, which means locating a source for financing it. One approach might be to identify 20 suppliers highly invested in the industry and approach them to support a campaign because it would be in their best interests as well.

#### **Success:**

- Develop measurement tools.

**6****Government relations**

How do we get government involved in what we do? Government does a great job of collecting statistics: 99% of healthcare dollars are spent on people over age 65, 93% have one chronic illness, 77% have 2 or more chronic illnesses. The government has this information and knows the cost per person, but policymakers are not looking at alternatives to the medical model. Economic pressures are at work on the government just as they are on all the businesses in the active-aging industry. Older adults are experiencing economic ups and downs, which impacts their ability to take advantage of wellness environments and services.

**Actions:**

- Organize a task force to get the funding for the PSA. We cannot change the government without speaking to society to drive that change. In response to citizen and organizational pressures, governments will help fund the PSA announcements.

**Driver:**

- Task force.

**The message:**

- “Lifestyle” has a proven ability to reduce healthcare costs.

**Next steps:**

- Examine models of other countries that are focusing on prevention, like the United Kingdom.
- Let the government know that we are the experts in wellness.
- Draft a consumer message. For example, New York state has an aggressive no-smoking campaign: If you aren’t planning to quit, what are your planning for? [image of open heart surgery]

The wellness approach might be: If you aren’t planning to take a walk today, what are you planning for? [image of a pile of pills on a desk]

**Success:**

- Funding is generated to support the public relations campaign.

## 7

### Partnerships

What is the main focus of all of us partnering together? The goals of organizations or the type of organization tie together partners.

#### Actions:

- Recognize that family members, vendors, administrators, friends and staff are all connected to serve older adults. To be successful, partner with all of them.
- Partner with HMOs and other healthcare providers to build outcomes based on an individual's diagnosis rather than guesswork. This will reinforce the value of wellness activities to those providers.

#### The message:

- Outsourcing is valuable. It is a more flexible way to offer services without having to own them. Needed expertise and resources can be gained through partnerships.

#### Next steps:

- Reach out to all staff members, from housekeeping to administrators, and partner with them since they are very close to what is happening in the lives of older adults.
- Establish an active referral network with current partners and trusted resources. The benefit is that all partners, including the older adults, have the best possible outcome.

#### Success:

Success factors to be determined.

## ICAA Next Steps

The ICAA Forum teams generated a list of nearly 20 action items. Some of these are overlapping (eg, public relations, establish wellness leaders as experts), some reinforce issues presented in previous Forum think tanks (defining wellness, outcomes measurements) and some are building upon projects completed or in process within ICAA (career development, benchmarks, Developer' Guide annual).

ICAA staff will review the suggestions, balance them against other agenda items, and then solicit opinions from the ICAA Advisory Boards as outlined on page 3, ICAA Industry work flow. Based on those results and placement in ICAA's strategic plan, groups will be formed to carry forward these actions.

## Resources to implement the action items

ICAA has resources that are pertinent to the observations and recommendations of Forum delegates.

## Culture and staff

Several ICAA white papers provide thought leadership and practical suggestions for implementing a wellness culture. These are tools to educate board members, developers and architects as well as foundation resources for staff onboarding and development.

- “Key elements for developing a wellness program for older adults” outlines seven strategic areas for organizational development.
- “ICAA career path for wellness professionals” explains the role of dedicated wellness staff (regardless of an organization’s departmental structures), along with recommended knowledge areas and skills.
- “ICAA’s guidelines for effective communication with older adults” lists usages that sidestep aging stereotypes.

Download the white papers here: <http://www.icaa.cc/business/whitepapers.htm>

## Physical environment

- ICAA Developers Guide annuals (2006-2013) feature many articles on developing bricks and mortar places for wellness as well as outdoor environments. There are concepts, models and detailed advice for planning and funding.

Find the Developers Guide articles, back issues and videos in the archives (key words: community design, construction) or in the Member Zone on the ICAA website: <http://www.icaa.cc/>. An ICAA member number and password is required.

- “Practical strategies for providing wellness in outdoor environments” is a white paper with many ideas to create activities that use the outdoors.

Download the white paper here: <http://www.icaa.cc/business/whitepapers.htm>

## Change the perception of aging

- Elements of a public relations campaign were developed during a 2009 ICAA Forum in support of the Rebranding Aging initiative. The ICAA Rebranding Aging work group wrote an action plan identifying strategies and tactics for changing the perceptions of aging. The elements of a public relations campaign and the Rebranding Aging plan are available upon request.

- The Changing the Way We Age® campaign is intended to present positive views of aging through the outreach of older adults and professionals who serve as Champions.

Learn about the campaign here: <http://www.changingthewayweage.com/>

## Outcomes

- The ICAA/ProMatura Wellness Benchmarks for retirement communities is a free, web-based management tool that generates objective data to track utilization of services. The system links wellness activities to key metrics for retirement communities: overall satisfaction, length of stay, falls history and self-perceived health status.

Learn more about the benchmarks here: <http://www.icaa.cc/business/benchmarks.htm>

# ICAA Forum



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