

Elders on Campus: Maximum Benefits on All Fronts

By Daniel Cinelli, AIA; Tye Campbell, PE; and Glen Tipton, AIA

Experts in the social sciences are predicting that financially stable seniors of tomorrow will look for satisfying and enlightening experiences, age-integrated relationships and escape from preconceived ideas of ageism.

“This whole idea allows colleges and seniors to experience and exchange multiple levels of value: financial, knowledge, cultural, historical and emotional,” said Johan Brongers, comptroller for Hampshire College.

As architects, we often find ourselves involved with the facilitation of the strategic planning process for many clients as they look to expand existing services or reposition/replace outmoded retirement communities. With future predictions about changing desires of older Americans, providers are:

- becoming aware of the movement toward a population that may not want to live within the walls of the normal continuum of care—an age-segmented, stereotypical community.
- conferring with their boards to assess future program, service and building needs.
- looking beyond traditional models via diverse business market partnerships, including a growing interest in teaming with colleges and universities to offer a “life-long learning” model.

The education and provider partnership may be one of the most interesting and appealing opportunities in senior living. To help you understand these partnerships, this paper provides a broad overview of campus planning, financial considerations, and who’s doing it and why.

Why Is This Important Now?

By the year 2035, the population over 65 will have doubled. This country’s baby boomers will reinvent retirement—launching new careers as they “retire,” taking advantage of the “longevity bonus” to create a whole new life after 65, exploring stimulating

opportunities that bounce between leisure and work, and increasing community involvement and personal growth. This generation is and will continue looking for lifestyle options, locations, programs and services to match their needs. Partnerships and developments between educational institutions and senior housing and services providers represent the vanguard of a field poised for rapid growth.

Who Is Doing This?

Perkins Eastman’s research shows that today’s seniors, educational institutions and continuing care retirement communities are all seeking their own future identities, including:

- an affinity of history and continued spiritual, physical and intellectual growth. They long for a way to contribute to society.
- a way to renew their “passport” of youth and vitality, utilizing the hearth and heart of the higher education community.
- more involvement in real life activities and the need to feel a link between intellectual stimulation and wellness.
- freedom to pursue second careers and a rich cultural life (both active and passive engagement) that includes theater, music, art, discussions and sporting events.

Many seniors feel that their college days were one of the most positive times of their lives. Retirement or active adult settings located near college campuses allow this group to relive a vibrant experience while engaging in stimulating events and programs.

CSD has been involved in the master planning of an innovative retirement community focused on life-long learning. The father of this community is long-time AAHSA member and recipient of the AAHSA Award of Honor, David Green, retired CEO of Evergreen Retirement Community in Oshkosh, Wis.

Green describes his concept as a “naturally encouraged retirement community.” He has also responded to the initiative of the recently elected chancellor of the University of Wisconsin at Oshkosh (UWO), Richard Wells, to expand his college’s enrollment through continuing education. Green based his thesis on the marketing success of Lasell College’s Lasell Village, which revolutionized university-affiliated retirement living by requiring 450 hours per year per resident of involvement in some form of life-long learning.

Green further wished to help his city revitalize itself through this new model of retirement living. The idea was to create a new in-town community on the reclaimed, underutilized, industrial Brownfield site. This community was designed to attract people of all ages who share a common vision of the benefits of urban living, sustainability and life-long learning through required involvement in teaching, volunteering, mentoring and continued education. Created through a proposed partnership with UWO, Evergreen, local developers and the City of Oshkosh, the new housing, commercial and community services, university facilities and long-term care services would be combined in an intergenerational, urban, riverfront community that Green calls the “Living, Learning, Connecting Community.” He says, “This revolutionary idea is perhaps before its time, but should become a model for this new age of retirement living.”

Perkins Eastman is working on a number of university-based retirement communities, three of which are affiliated with the Osher Life Long Learning Institute (OLLI). Two of these new programs will be located in age-integrated communities that have been master planned with traditional neighborhood design goals. Discussions with the OLLI members for these new communities clearly point to the importance of a vibrant lifestyle rich in intellectual, social and recreational pursuits.

Market researcher Maria Dwight of Gerontological Services, Inc., points out, “Our extensive research indicates that this new generation of older people is not seeking passive lifestyles, traditional service and activity programs, or age-segregated living. They are drawn to new models that offer fitness programs and facilities, creative leisure opportunities, and new

adventures in learning and living. The new communities that we are working with are not traditional CCRCs, but are integrated into the larger community within new towns and similar ‘new urban developments.’ Opportunities for purposeful and spontaneous intergenerational interaction are an important fabric of the model, which may be expedited through resident and non-resident memberships and with close relationships with OLLI campuses, through classes, work-study opportunities, intergenerational programs in the arts, language, science, etc. The communities also offer college and university students opportunities to intern in their practicum of study.

“Some aspects of these new models harken back to the 1960s when CCRCs really did attract 65-year-olds to independent living and had only a few infirmary beds. The rigidity of the model as it has evolved into today’s CCRC makes it unattractive to those under 75 or 80, which excludes a whole generation of older adults. The research shows us that there is an increasingly strong demand for a new model of retirement living that has little to do with retirement.”

What Are Higher Educational Institutions Thinking?

In working with various higher education clients on their long-range master plans, Perkins Eastman has found that these institutions are trying to position themselves to attract early boomers looking for the intellectual, cultural and employment opportunities that a life-long learning environment might provide. A number of concerns have positioned colleges and universities for this opportunity, including:

- increased competition for curricular and cultural niches, and a burgeoning continuing education market.
- a greater need to attract junior faculty and to retain existing senior faculty/staff for continued research.
- a changing student body seeking practical and professional knowledge, and meaningful interactions from all stakeholders.

- a growing alumni group seeking to reinvent their retirement. Colleges and universities provide fertile ground for a stimulating, challenging lifestyle and work opportunities.
- medical schools and gerontology programs needing elderly referrals.
- alliances that may increase potential endowment funding via planned giving help bring “town and gown” together around common goals and improve future relationships.

Perkins Eastman’s university clients also see a number of benefits to partnering with CCRC providers, including:

- opportunities to share future curriculum foci.
- creation of a synergistic platform for possible fundraising shortfalls, multiple functioning campus facility needs and fragile relationships with host municipalities.
- increased opportunities through joint fundraising campaigns.
- adjacency benefits that may allow the college or university to offer other community resources, such as convenience stores and restaurants, hotel conference centers, and health care and wellness components.

Like universities, many religious-based CCRCs bring to the table a holistic mission, which typically helps in gaining early trust and a shared vision to serve as a solid infrastructure for this partnership to flourish.

Dean and Executive Director Paula Panchuck of Lasell College said, “After six years of opening, the project has exceeded everyone’s expectation, particularly in the area of life-long learning.” Early speculators were quick to judge that asking seniors to take 42 credit hours of classes in their retirement years would never come to fruition. One hundred and seventy-eight apartments later, with a waiting list pushing more than 100, Lasell College is proving them wrong.

Panchuck added that one of the other strong successes of the project has been the physical proximity of the senior apartments to the college. “This proximity cements their presence on the campus with the other college students,” she said. Every foot closer you can

move the seniors to the school, the more engaged they become. Additionally, the college has begun to witness some financial synergies with the two programs sharing joint management and facilities contracts.

Why Are Providers and Educational Institutions Attempting This?

As today’s financial officers look at future campus land utilization, capital expenditure and fundraising targets, they understand that the growing senior niche can become future users, synergistic benefactors and potential funding sources. Senior housing and service providers are looking for a new vision for future campus locations and programs. Both groups are often mission-based, complementing one another’s vision and goals.

The colleges and universities want to keep existing alumni, staff, faculty and friends in the area to teach, lecture or volunteer. Rural colleges and towns might gain financially stable incomers to increase the population and bring new services without a fiscal burden to the municipalities, i.e., school districts. Revenue from seniors’ tuition and participation may also be helpful to a college’s bottom line.

In an interview with Perkins Eastman, Johan Brongers, comptroller for Hampshire College, said the college felt that developing an active adult community for seniors offered a “higher value” for the land than other academic facilities while retaining its academic zoning. A 99-year, long-term capitalized land lease agreement with the co-developer will bring short- and long-term capital to the college’s financial base. The longer-term payoff will be a transfer fee collected by the college after future condominium owners resell the units.

The Kendal Corporation, a long-time proponent of university-affiliated retirement communities, developed Kendal at Oberlin in 1993 at the initiation of Oberlin College alumni and professors on a site just three blocks from campus (1,800 students) in the city of Oberlin, Ohio (pop. 8,000). Kendal at Oberlin is a 300-resident CCRC.

Barbara Thomas, CEO of Kendal at Oberlin, and Ann O’Malley, CFO, offered these thoughts in an

interview with Glen Tipton of CSD. Although there is no official relationship with Oberlin, the founders realized that the college and the city offer Kendal residents an ideal environment wherein opportunities for life-long learning and community volunteering, the advantages of small-town living and intergenerational activities would be widely available. In short, “town and gown” opportunities abound.

What has developed over time has been a three-way, mutually beneficial relationship among the CCRC, especially its residents, the college and the city. Residents actively participate in a wide array of college programs, facilities and amenities. Students are engaged in many work-study programs at the CCRC, creating a lively intergenerational atmosphere. The residents are active in many aspects of civic life, including politics; and the city benefits financially from a payment in lieu of taxes that Kendal encourages to support a healthy community.

An innovative, three-part co-venture is an initiative of the city to encourage energy conservation. The college’s Department of Environmental Studies student and staff researchers and the residents of the CCRC, the city and the college are looking for ways to optimize energy conservation. The CCRC will implement the energy-saving ideas in its next renovation project.

As is typical of most college-affiliated CCRCs, only about a third of the residents are alumni or retired staff of Oberlin College. However, unlike most CCRCs that draw from a fairly tight geographic market, Kendal at Oberlin’s unique blend of a quality CCRC, a small-college-town lifestyle, and the life-long learning and amenities of the college have made this CCRC a destination community with residents attracted from 29 states.

SFCS Inc. has been working with Warm Hearth Village in Blacksburg, Va., to expand its offerings to current and future residents. Warm Hearth Village has developed strong, informal relationships with neighboring universities and community colleges. The relationship with Virginia Tech (VT), which shares a property line with Warm Hearth, and Radford University (RU) in nearby Radford, Va., have been particularly valuable.

Ferne Moschella, Warm Hearth president and CEO, said there have been many benefits to this relationship, including:

- **Shared board members.** Moschella serves on the board of the VT Center for Gerontology and on RU’s Waldron College Council. Warm Hearth’s board includes representatives from the VT Foundation and Center for Gerontology as well as RU’s Waldron College School of Nursing and the Via Virginia College of Osteopathy.
- **Gerontological research.** Warm Hearth, VT and RU enjoy the mutual benefits of gerontological research conducted on the Warm Hearth campus. Projects conducted by faculty members and students have included the effects of horticulture on residents with dementia and the effect that a “reminiscence” program of organizing and digitalizing old photos has on strengthening the memories of older adults. The universities benefit from a convenient primary research site and the chance to publish the research. The Warm Hearth residents benefit from the social opportunity enjoyed with the researchers as well as the knowledge that they are making a positive contribution to society. Residents who are retired faculty or relatives of faculty enjoy the “official” connection to their former workplace.
- **Clinical rotations.** Warm Hearth Village benefits from the clinical rotations that nursing, dietetic and other students undergo at the community. Nursing students from the RU Waldron College of Nursing not only hone their skills and spend time with the residents, but also conduct valuable in-service programs for Warm Hearth employees.
- **Student volunteers.** With campuses’ increased interest in including a community service component as part of a student’s education, a growing number of students volunteer their time at Warm Hearth Village. Students augment Warm Hearth’s existing activities programming by providing computer support for residents, playing bingo and cards, and participating in a variety of activities that foster social interaction between the generations.

- **Facility design considerations.** When Warm Hearth Village approached the Virginia Tech Alumni Association a few years ago about the possibility of using the alumni database to conduct research about potential new facilities, Warm Hearth offered to share the results with VT and to strive to provide facilities that would draw alumni back to Blacksburg to live. VT agreed, and the 91 cottages and the village center/wellness center that SFCS Inc. is designing for Warm Hearth reflect the results of multi-phased research over a two-year period. The size of units, pricing and other design considerations have been influenced by alumni preferences obtained through mailings, phone interviews and multiple focus groups.
- **University-linked marketing.** Warm Hearth's marketing staff has taken advantage of the popularity of VT's nationally ranked football program. The community has purchased a block of tickets to home games and invites prospective residents to tailgate with the Warm Hearth marketing team before the games. Some prospects who already have season tickets visit the tailgate parties to enjoy the social interaction. The marketing staff serves information on the new cottages and community/wellness center along with beverages and snacks in a fun, informal setting.

In a subsequent interview, Ray Smoot from Virginia Tech echoed some of the benefits that Moschella outlined and added a few more from the university's point of view. He noted that a close relationship with a retirement community can benefit a university or college by:

- providing a revenue stream for the university. Although a land-lease relationship does not exist between VT and Warm Hearth Village, universities and colleges can enter into long-term land-lease arrangements with neighboring retirement communities.
- encouraging higher-income alumni to move back to their alma mater city. The more engaged the alumni are with their alma mater through their retirement community or other connections, the more likely they are to contribute both time and economic resources to the university.

- providing a supportive and stimulating home for the parents of university faculty and staff when those parents need to be closer to their adult children, who may already be familiar with and trusting of a university-linked retirement community.

A Note on Communication

Ferne Moschella and Ray Smoot agreed that communication between a retirement community and a university or college usually starts with the community administrator and the top business officer of the school and is nourished through sharing of board members. However, as the relationship develops, the links become decentralized and occur, discipline to discipline, at multiple levels. For example, nursing, dietetics and social work faculty members at RU and VT work directly with their Warm Hearth counterparts to arrange clinical rotations and in-service training. Service learning faculty members work directly with the Warm Hearth activities staff to schedule students' volunteer opportunities.

With regard to research projects, the board of directors of Warm Hearth has created a committee dedicated to the review and approval of proposed projects. This was done to ensure that all research conducted at Warm Hearth meets the highest possible standards and preserves the safety and dignity of the residents at all times.

SFCS Inc. has been involved in many university-related or affiliated CCRCs over the years, including Westminster Canterbury of the Blue Ridge in Charlottesville, Va., and Whitney Center in New Haven, Conn.

Westminster Canterbury of the Blue Ridge (WCBR) enjoys an informal and opportunistic relationship with the University of Virginia (U.Va.). WCBR has no formal business ties to U.Va.; however, the relationship for staff and residents is strong, including the following active programs:

- A trained geriatrician is one of the medical directors at WCBR and is a professor of geriatric medicine at U.Va. He is actively involved in the continuing education of staff on senior-related issues.

- University nursing students learn from hands-on experience at WCBR as part of their curriculum requirements.
- Residents of WCBR can partake in classes and lectures through the Miller Center as part of a simulcast series, and they can take part in classes and lectures at the Jefferson Institute of Learning.

Having just completed a major campus repositioning, WCBR and SFCS Inc. carefully crafted the building program to meet the demands of the consumer and to create an architectural style that respects the Jeffersonian influence of U.Va., thus further strengthening the informal ties.

Whitney Center in New Haven, Conn., enjoys an informal relationship with Yale University. Again, Whitney Center has no formal business ties to Yale; however, the relationship for staff and residents is strong.

Whitney Center and SFCS Inc. are currently planning a major campus repositioning, which will in part be designed to strengthen the cultural ties of Whitney Center to Yale. One example is the planned Cultural Arts Center. It will attract music, theatre and visual art programs to the Whitney Center campus and strengthen the existing fine arts committee of residents currently living at Whitney Center.

It's Not for Everybody! Who Walked Away and Why?

Perkins Eastman facilitated a strategic planning process with a major midwest religious college and a similar, faith-based senior living provider. They mutually agreed to create an adjacent CCRC that would be available to alumni and their parents, retired faculty and surrounding senior consumers within the primary market area. Perkins Eastman developed a questionnaire that was sent to 1,400 alumni (in a four-state area) under the letterhead of the college president. The survey received a 42% return rate and responses highly favorable to such a project. The college, however, after months of soul searching and deliberations by the board and facilities staff, could not justify the sacrifice of any

existing college property for a project that “strayed” from its core purpose: the education of 18- to 21-year-olds. The college president and CFO were disappointed in the result.

Summary

In summary, we have found that today's seniors believe that college and university related senior developments can offer diversity, stimulation, activity, and care. Universities see these new developments as an opportunity to keep retired faculty nearby and contributing to campus life, capture new enrollments, maintain alumni relations, remain an educational resource, and obtain a new population to support new services being offered to seniors. From the community perspective, senior developments provide a new taxable population with no burden on school districts, create a new economic base for town retail, increase community-wide volunteerism, and bring formerly exempt properties to the tax rolls.

Authors



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