

Industry Benchmarks Emerge

First results from ALFA's National Resident Satisfaction Survey identify industry types, willingness of families/residents to recommend facilities, and opinions of value vs. cost.

By William J. Nowell and Irving L. Stackpole

The first results of ALFA's National Resident Satisfaction Survey, conducted by ServiceTRAC Inc., of Scottsdale, Arizona, and Stackpole & Associates of Boston, are now available. Roughly 30,000 surveys have been distributed and more than 8,500 have been entered and analyzed, representing the largest body of satisfaction and related data ever collected and analyzed about the assisted living industry. Another 7,000 responses are expected during the next several months.

ALFA and ServiceTRAC mailed the first standardized surveys in April 1998 anticipating the assisted living industry would embrace the idea of a standardized satisfaction measurement protocol. The data from a large sample would be critical to provide results that would refine industry services, establish stronger competition, and contribute to a more progressive, outcome-oriented database for regulatory applications.

This satisfaction measurement protocol has two components: performance measurement and importance measurement. The respondent has an opportunity to rate the performance of the community in many dimensions, as well as the importance of these dimensions. When these responses are collected and analyzed, individual senior living communities can evaluate their performance and the relative importance of each dimension as reported by residents, families, and employees. Further, through the collected data from The National Resident Satisfaction Survey, participation senior living communities can compare themselves to similar communities throughout the country. This type of benchmarking will provide individual communities with invaluable operational and marketing insights.

In addition, this survey protocol will allow regulatory bodies to reference industry benchmarking data for potential accreditation applications. Several states are considering this, including California and Iowa.

Industry Profiles

One challenge of the survey is to categorize the communities and respondents within the assisted living industry – a challenge facing assisted living researchers nationwide. For this report, respondents to the National Resident Satisfaction Survey have been classified into five categories:

- Freestanding assisted living facilities
- Independent living attached to, or on campus with, assisted living
- Assisted living within a continuing care retirement community
- Skilled nursing beds included within a CCRC
- Alzheimer care as part of another community

NUMBER OF RESPONSES TO SURVEY

Resident	5,453
Family	1,836
Employee	1,285

In addition to segmenting the industry by community type, data was collected on the size of the communities, length of residence, age, and gender.

COMPARING PERFORMANCE AND IMPORTANCE

Satisfaction measurement is subjective and affected by many factors. To create effective, useful benchmarks that can have widespread application within the industry, it is necessary to distinguish between the expectations of the different audiences (eg., families and residents) and among the different types of communities.

By sorting the performance and importance ratings by community type and respondent type, rather than the aggregate ratings, a far more accurate and useful analysis is possible. The data collected strongly suggests a host of statistically significant differences between and among these factors (community types and respondent types) in terms of how they influence expectations about service quality and other variables.

...The survey instrument allows the respondent to read how well the community is meeting his or her expectations and to rate the importance of several of the critical dimensions.

Importantly, the survey instrument allows the respondent to rate the importance of several of the critical dimensions. Seven questions ask the respondent to rate various aspects of the staff, such as reliability and responsiveness. In another section, a question is asked about the importance of the respondent's interactions with staff. This allows community management insight into how residents and families rate the performance of

staff, and can consider that rating in relation to the importance of the overall staff relationship.

For instance, those issues about which residents and families report low satisfaction that are of high importance will necessarily draw greater attention than issues that receive high satisfaction and low importance ratings. Such analysis allows management to prioritize its actions to those issues that will produce the greatest benefit. This “Priority Action Index” is a key feature of this process.

Some of the more notable initial findings suggest:

- Family members rate the fulfillment of their service expectations regarding staff, security, assisted living services, the physical environment /apartment, and administration higher than do residents.
- Residents rate the fulfillment of their service expectations higher than do families regarding housekeeping, food service, maintenance services, and grounds keeping.
- Willingness to recommend among family members is significantly influenced by the attitude of the staff, the appearance of meals, and the friendliness of administration.
- Willingness to recommend among residents is significantly influenced by the activities and amenities offered by the community.

These four points provide powerful insights for marketing, sales, and guest relations. Families typically are more influenced by their relationship with administration, the staff, the physical environment, and the appearance of the residence; whereas, residents are more influenced by housekeeping, food, activities, and willingness to recommend not only are dependent upon respondent type but also are significantly affected by the community type. Key findings include:

- Respondents from CCRC assisted living communities rate the satisfaction of their expectations significantly higher than freestanding assisted living.
- Family respondents from Alzheimer environments are the most satisfied among all community types, reporting the community provides good value for the cost, the community overall has exceeded their expectations, and they have a strong willingness to recommend.
- Willingness to recommend appears to be significantly influenced by the friendliness of the employees.
- Among family members and residents of assisted living units in a CCRC, willingness to recommend is influenced by whether the staff was genuine and caring, the atmosphere of the dining room, reliability of housekeeping services, home/community overall, and the convenience of the apartment floor plan.
- Willingness to recommend in freestanding assisted living communities is significantly influenced by whether caring attention was paid by staff, the friendliness of employees, and the variety of the food menu.

- In the freestanding assisted living environment, the perception of value is dependent upon whether the resident feels he or she is living the life hoped for and whether or not the staff is knowledgeable of individual care requirements.
- Family members and residents in assisted living units within a CCRC feel the community provides good value for the cost when they believe they are living the life they hoped for, and when their needs are being addressed in a timely manner.
- In the Alzheimer's environment, food, security, and activities are the most important factors.
- In the freestanding assisted living environment, interaction with staff, assisted living services, and administration are the most important factors to overall satisfaction.
- Within skilled nursing environments, there is no significant difference in how expectations are rated between family members and residents.

Willingness to recommend among residents is significantly influenced by the activities and amenities offered by the community.

FUTURE RESEARCH

By continuing to collect valid, reliable data and categorizing it properly, the assisted living industry will be more efficiently analyzed and understood. This creates opportunities to ensure higher satisfaction and value. For example, based on the data, one can now pinpoint departments vital to overall satisfaction and determine the needs and expectations of residents and family members based on the type of assisted living environment. All in all, this information enables the industry to design effective employee training, create predictable outcome measures, and develop more proactive evaluation tools.

This is an ongoing study. Data is being collected nationwide and all companies are encouraged to participate. A more complete analysis of the ALFA National Resident Survey will be highlighted during ALFA's Spring Conference April 18-21 in Dallas.

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