

Carlsbad by the Sea Retirement Community

Excellence in Aging Services

Who we are

- ▶ **Corinne Holt Sawyer**
 - ▶ President, Resident Council
 - ▶ English Professor (Shakespeare); college administrator; and novelist
- ▶ **Ray Killeen, M.D.**
 - ▶ Chair, Residents' Health Committee
 - ▶ Internist
- ▶ **Mary Beth Tompane**
 - ▶ Chair, Residents' Legislative Committee; Past President, Resident Council
 - ▶ Resident Member, California Continuing Care Advisory Committee; career management consultant to not for profit organizations
- ▶ **Jack Cumming**
 - ▶ Chair, Residents' Finance Committee
 - ▶ Fellow of the Society of Actuaries
- ▶ **Roberta Jacobsen**
 - ▶ President, Front Porch Communities and Services
 - ▶ Active in industry affairs and direction



Resident Empowerment

- ▶ **Origins of the Survey Project**
 - ▶ Spontaneous
 - ▶ Grassroots
- ▶ **Execution of the Project**
- ▶ **Guiding Principles**
 - ▶ Nothing Personal
 - ▶ Nobody's Pet Peeves
 - ▶ Positive Approach
 - ▶ Positive Framing of the "Questions"
 - ▶ Results Would Speak for Themselves
 - ▶ The Survey is just a *survey*; it's not a scientific investigation





Survey Specifics



How it turned out in practice

In 2009 we had a two page survey

Carlsbad by the Sea Resident Opinion Survey

The Resident Council wants to know what you think so that we can appropriately voice your concerns. We have created this survey from the opinions at a recent pilot workshop, initiated by the Finance Committee. We know that there are many other questions we might explore but we decided to start simply. Please take a few minutes to give us your opinions.

For each statement below, **circle the number** to the right that best fits your opinion. Use the scale to match your opinion.

Statement	Scale of Agreement					
	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	No Opinion
I feel stronger and more effective since moving to CBTS	5	4	3	2	1	
Management listens to my ideas and responds effectively	5	4	3	2	1	
CBTS is managed at the lowest feasible cost	5	4	3	2	1	
I would recommend CBTS for people who are still vigorous and healthy	5	4	3	2	1	
Cost commitments made before I moved in have been kept	5	4	3	2	1	
CBTS subsidizes other communities that are less affluent	5	4	3	2	1	
CBTS has the area's highest quality nursing care	5	4	3	2	1	
Front Porch operates on non-profit principles	5	4	3	2	1	
The new Lobby makes CBTS more attractive	5	4	3	2	1	
CBTS is a green community, committed to the environment and sustainability	5	4	3	2	1	
I am more fit than other residents	5	4	3	2	1	
I fear that I may outlive my assets	5	4	3	2	1	
The Care Center is homelike and welcoming	5	4	3	2	1	
Communication with residents is a management priority at CBTS	5	4	3	2	1	
CBTS is well maintained and repairs are made promptly, efficiently, and effectively	5	4	3	2	1	
CBTS is clean and well-kept	5	4	3	2	1	
I am able to influence decisions that affect my life at CBTS	5	4	3	2	1	
Food service is luxury quality	5	4	3	2	1	

Return Survey to Box under the Activities Bulletin Board near the Front Desk

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Turn Over

Statement	Scale of Agreement					
	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	No Opinion
Front Porch is open and transparent concerning financial operations and management	5	4	3	2	1	
I would feel more secure if California Lutheran Homes were still in charge	5	4	3	2	1	
It's fair to have the same monthly fee increase for all Front Porch communities	5	4	3	2	1	
I'm glad that Front Porch absorbs most costs to support California Lutheran Homes Foundation	5	4	3	2	1	
Front Porch and CBTS keep executive staff to the minimum needed	5	4	3	2	1	

	Opinion on Monthly Fee Increase					
What do you consider a fair monthly fee increase if the Social Security Cola Increase is 5% (Circle only one)	3%	4%	5%	6%	7%	No Opinion

Classification Information (This information is for analysis purposes only; it will not identify individuals)

Age (Circle)	Gender (Circle)	Living Status (Circle)	Add any comments you would like us to consider.
60-64 85-89			
65-69 90-94	Female	Live Alone	
70-74 95-99			
75-79 100+	Male	Share Unit	
80-84			

Background. With its pilot workshop, the Finance Committee sought input into the budget process. The pilot was helpful, leading to the conclusion that a survey can have a wider reach. Budget questions affect other aspects of life at Carlsbad by the Sea, so the Resident Council has built on the Finance Committee's work to create this survey.

Most of the budget is out of our control. The Burbank office of Front Porch gets economic data from the University of Southern California; these data are combined with other input to set a single uniform annual percentage fee increase for all Front Porch communities combined. Thus, residents have no material influence over the amount by which our fees increase every year. Among other topics, the questions (which are in a random order) will provide us a sense of your views of:

- Stewardship of Costs and Fees
- Responsiveness to Residents – Current and Prospective
- Financial and Physical Security – Peace of Mind
- Quality and Level of Services
- Facility Maintenance and Upkeep

Return Survey to Box under the Activities Bulletin Board near the Front Desk

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Turn Over

For 2010 we had just one page

Carlsbad by the Sea 2010 Resident Opinion Survey

The Resident Council wants to know what you think so that we can appropriately voice your concerns. We have simplified the survey this year to make it easier to complete. For each statement below, circle the number to the right that best fits your opinion. These are just your opinions so you can answer even if you don't feel that you know what the answer might be.

Statement	Scale of Agreement					Don't Know
	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	
Front Porch limits fee increases to what is needed	5	4	3	2	1	
CBTS spends remodeling moneys wisely	5	4	3	2	1	
CBTS acts the way I expect a nonprofit to act	5	4	3	2	1	
CBTS has high quality nursing care	5	4	3	2	1	
The new Care Center rooms seem more homelike	5	4	3	2	1	
If I outlive my assets, CBTS will uphold my dignity	5	4	3	2	1	
CBTS has tight security	5	4	3	2	1	
CBTS benefits from being part of Front Porch	5	4	3	2	1	
Maintenance requests are completed effectively	5	4	3	2	1	
I'm confident my medical wishes will be respected	5	4	3	2	1	
I'm proud to live at CBTS	5	4	3	2	1	
Management responds promptly to my concerns	5	4	3	2	1	
I feel that Front Porch is financially secure	5	4	3	2	1	
Front Porch values our CBTS employees	5	4	3	2	1	
Food Services is responsive to residents	5	4	3	2	1	


Classification Information (This information is for analysis purposes only; it will not identify individuals)

Age (Circle)	Gender (Circle)	Living Status (Circle)	Add any comments you would like us to consider on the back.
60-64 85-89	Female	Live Alone	
65-69 90-94	Male	Share Unit	
70-74 95-99			
75-79 100+			
80-84			

Completed Years in Residency _____ New Residents enter 0.

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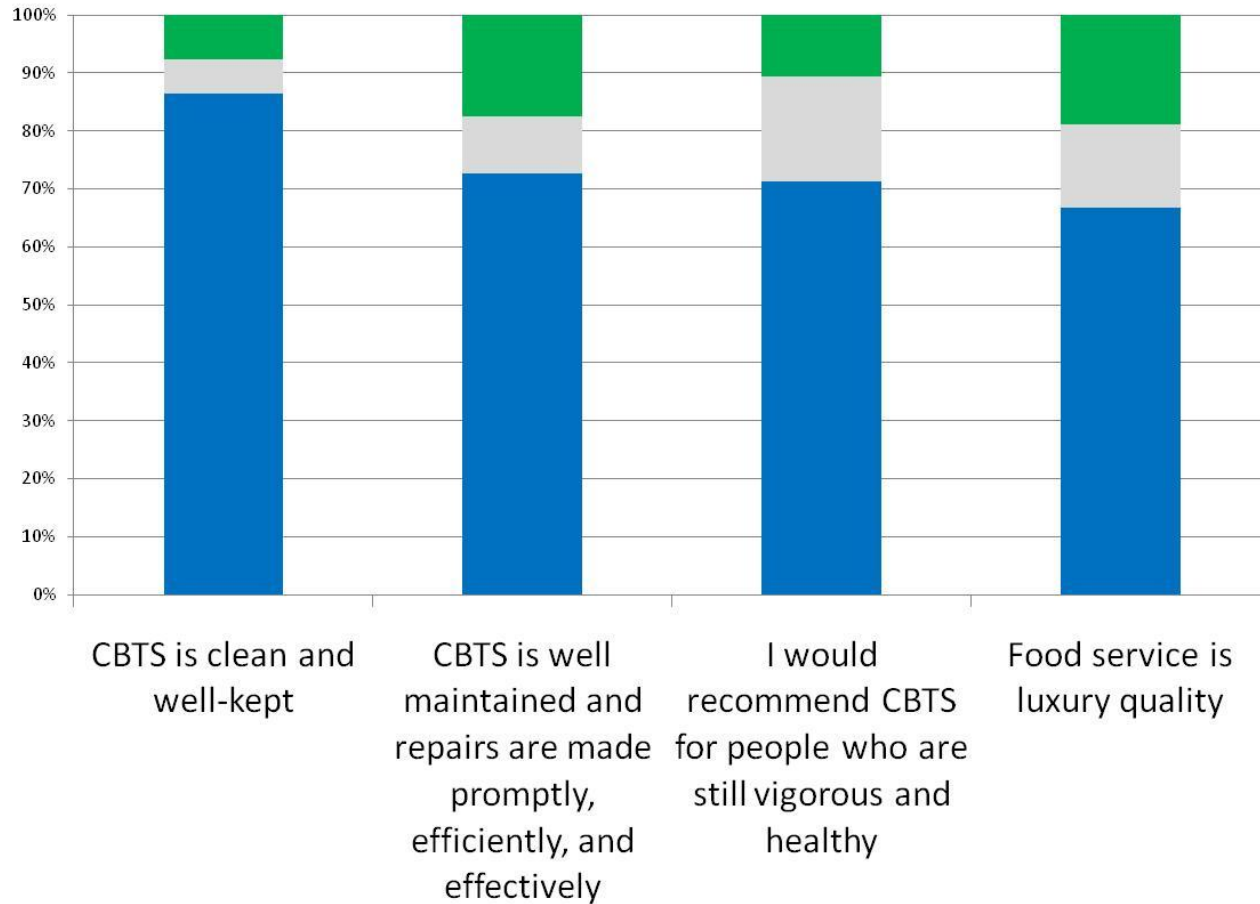
In 2009 we learned that residents like living at Carlsbad by the Sea and feel positively about their experiences.



2009 Results

Blue is positive and green is negative

■ Favorable ■ Noncommittal ■ Unfavorable



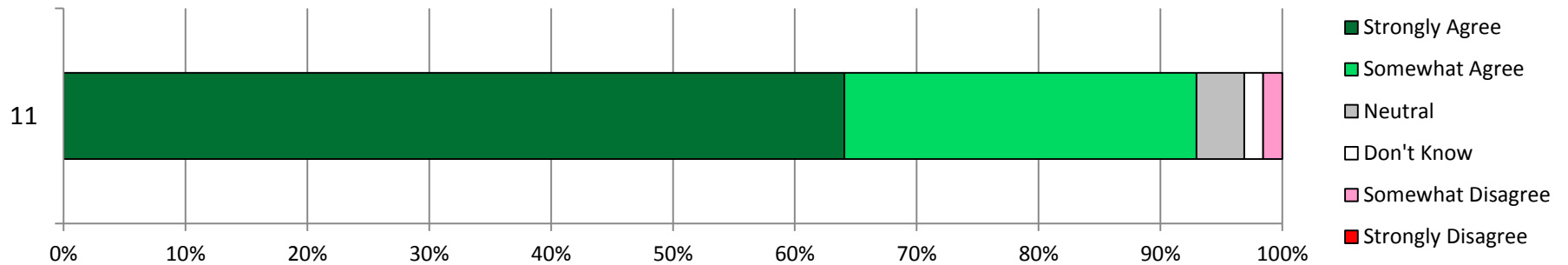
Residents Like Living at CBTS

Favorable Opinions Outweigh the Unfavorable



Residents' positive views persisted into 2010

I'm proud to live at CBTS



Here green is positive and red is negative

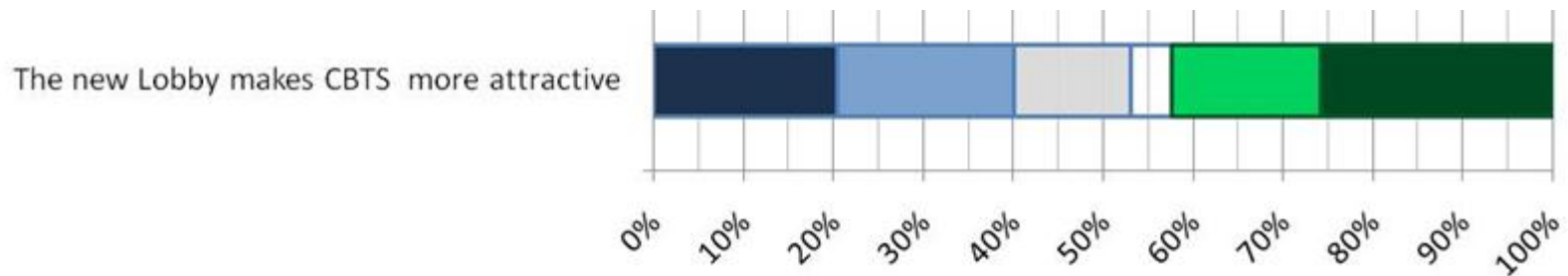


There were areas of controversy: Remodeling
choices can never please everyone



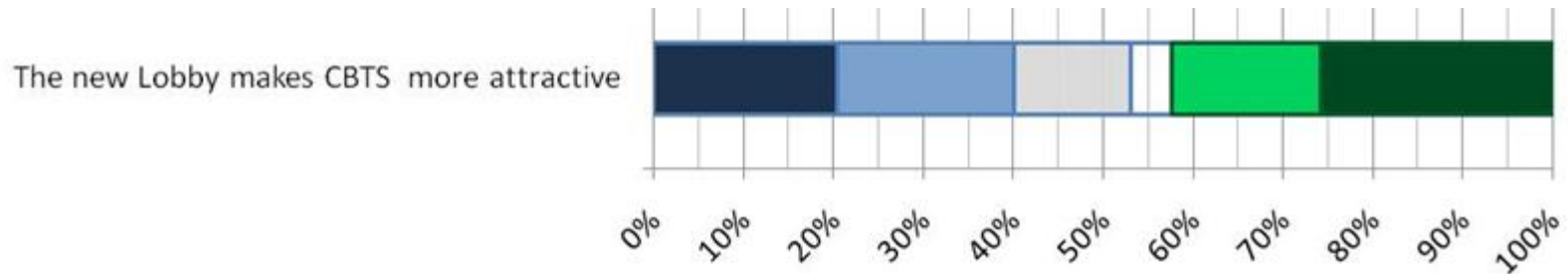
There were areas of controversy: Remodeling choices can never please everyone

- ▶ In 2009 the lobby makeover was a matter of interest and controversy (Blue was positive and green negative)

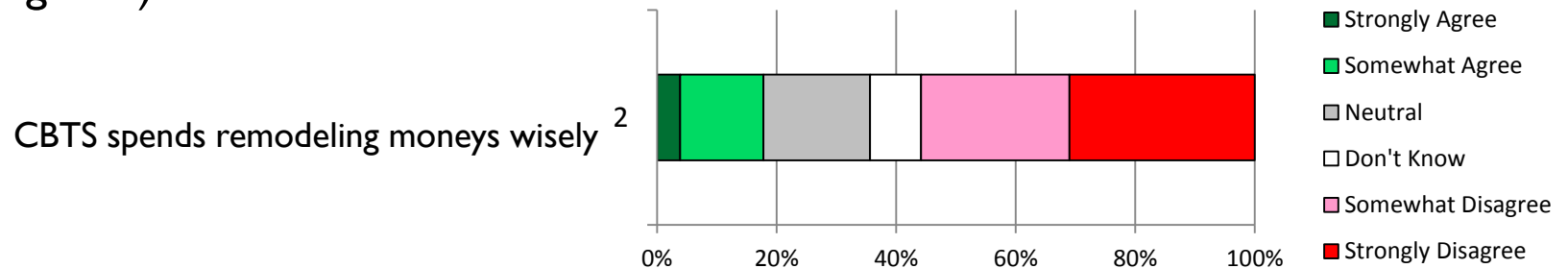


There were areas of controversy: Remodeling choices can never please everyone

- ▶ In 2009 the lobby makeover was a matter of interest and controversy (Blue was positive and green negative)



- ▶ In 2010 remodeling continued controversial (Green was positive and red was negative)



- ▶ **No Surprise. Remodeling will always be controversial**
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Conclusions

- ▶ Residents find financial matters challenging
- ▶ Residents are glad to be living in a CCRC and recommend CCRC living for others
- ▶ Health is a centerpiece of resident interest and Dr. Killeen will address that
- ▶ Resident involvement can facilitate service performance as Mary Beth Tompane will explain
- ▶ Jack Cumming will talk to survey specifics, and
- ▶ Roberta Jacobsen will give the management perspective

- ▶ More info is at www.cbtsresidents.com

