

*Pathways to Life Quality*

# **Kendal Progress Report**

May 1998

## **Background of Study**

As housing options for Americans in their later years continue to increase, we clearly can benefit from a better understanding of the experience of moving into new residential arrangements. For example, what enables individuals to make a successful transition into a continuing care retirement community? Do their expectations, needs, and characteristics influence their adjustment to communal living settings?

The *Pathways to Life Quality Study*, a collaborative research project of Ithaca College and Cornell University, examines this transition. Its goal is to promote understanding of housing patterns and residential transitions over the life course. The study is co-directed by Professor John Krout, Director of the Gerontology Institute at Ithaca College, and Professor Phyllis Moen, Director of the Bronfenbrenner Life Course Center at Cornell University. Faculty collaborators from both institutions include researchers representing disciplines such as psychology, sociology, environmental design, and economics (see back cover). Undergraduate students from each institution are also involved as interviewers and in analyzing and writing up results.

### **1995 Interview and Participants**

The *Pathways to Life Quality Study* began as a pilot study of the Founders group of Kendal at Ithaca (e.g., those who made the decision to move before the facility was completed). In November 1995 and January 1996, researchers from Ithaca College and Cornell Uni-

versity contacted all of the individuals anticipating a move into Kendal at Ithaca (N=204). About half (N=101) agreed to participate in the study and be interviewed. At the time of the interview, the respondents ranged in age from 65 to 95, with an average age of 77. Sixty-seven (66%) of the study participants are women, and twenty-six married couples (52% of the respondents) took part in the survey.

The group is fairly homogeneous with respect to ethnicity, income, education, and living standards: all are European-American, 69% report incomes of \$50,000 or more, 88% have at least a four-year college degree, and 80% rate their standard of living as at least equal to or better than what it was when they were in their fifties.

Before moving to Kendal, most (80%) of these individuals lived in single-family homes and most (78%) came from the area. While the majority moved to Kendal from towns or small cities (72%); some came from rural areas or small towns (11%), medium or large cities (7%), and suburban areas (5%). Almost one-third of the study participants had lived in their homes 30 years or longer, while only 12% had lived in their previous residence less than 10 years.

Our comprehensive survey asked about current residential environment, physical activities, health, future plans and expectations, community activities, family and informal networks, life satisfaction, and work history. In our initial 1996 progress report (before the move to Kendal), we found that these men and women were quite active, healthy, and satisfied with life. Three in five (61%) were volunteering, while sixteen percent were

still working for pay. Most chose to move to Kendal at Ithaca for continuing care, and many were looking forward to trying new activities and more exercising after the move, but prospective residents also expressed concern about adapting to smaller living quarters and to new eating arrangements.

### **1997 Interview**

In June of 1997 we asked all those who had participated in the first phase of the study to be interviewed again. We interviewed the 92 individuals in June through September of 1997 (four of the 101 participants in the first phase decided not to move to Kendal, and five had died). The survey booklet in this second wave of data collection contained many of the same questions as in the 1995 survey and booklet, with additional questions tapping residents' reactions to and satisfaction with various aspects of their new home at Kendal.

The following presents an overview of our research in progress. We address the following areas: satisfaction with Kendal, housing design and quality, adjustment to Kendal, social participation, and future plans for the project.

### **Residents' Satisfaction with Kendal**

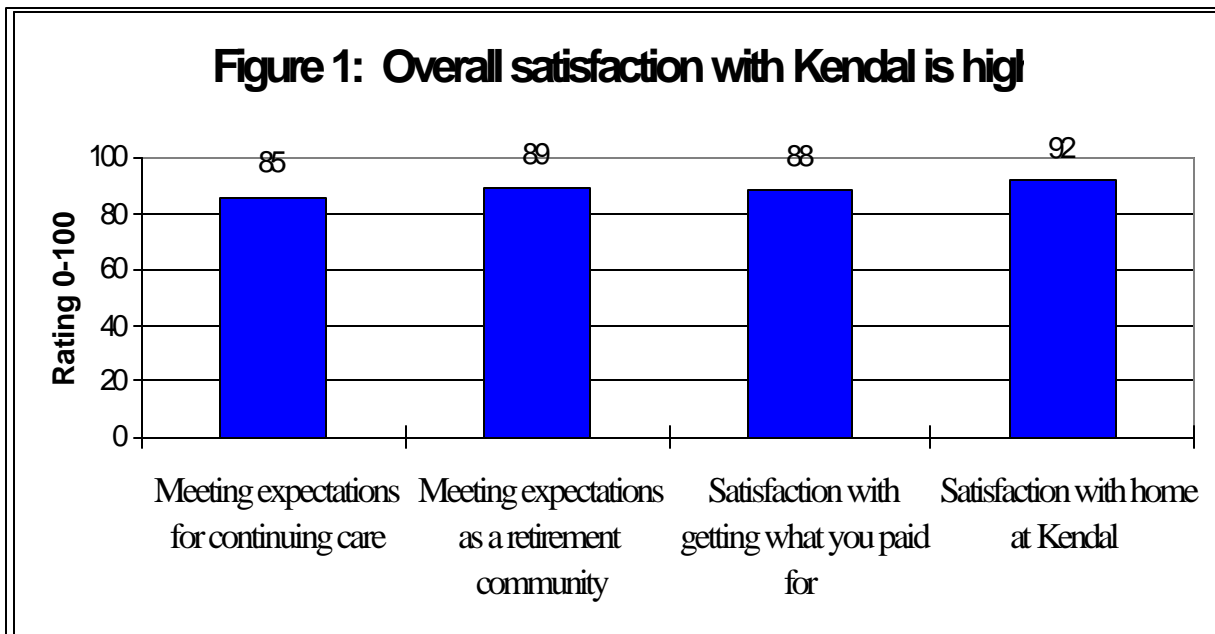
When we interviewed respondents in 1995 (before the move to Kendal), almost every person said that access to continuing care was a key factor for moving. For about one-fifth of the respondents (21%), this was the major and only reason for their move. Another fourth (25%) of the sample also thought that trouble with upkeep and mainte-

nance of their previous residence was an important factor in their wanting to move. A third group (32%) thought that knowing they won't be a burden to others was an important reason (along with access to continuing care), and a fourth group (21%) moved to Kendal for a mix of reasons (residence size, upkeep, not to be a burden, and continuing care).

### **Overall Satisfaction**

Respondents to the 1997 interviews (after the move to Kendal) rated on a scale of 0 to 100 how well Kendal meets their expectations as a continuing care, a retirement community, how satisfied they are with getting what they paid for, and with their residence at Kendal. The average ratings for these four scales are quite high (85 to 92 percent), suggesting that living at Kendal does meet the expectations of most residents (Figure 1).

However, despite these high averages, some ratings had a wide range of responses. A question about satisfaction with getting what you paid for has the broadest range (25-100). Ratings of whether Kendal meets residents'

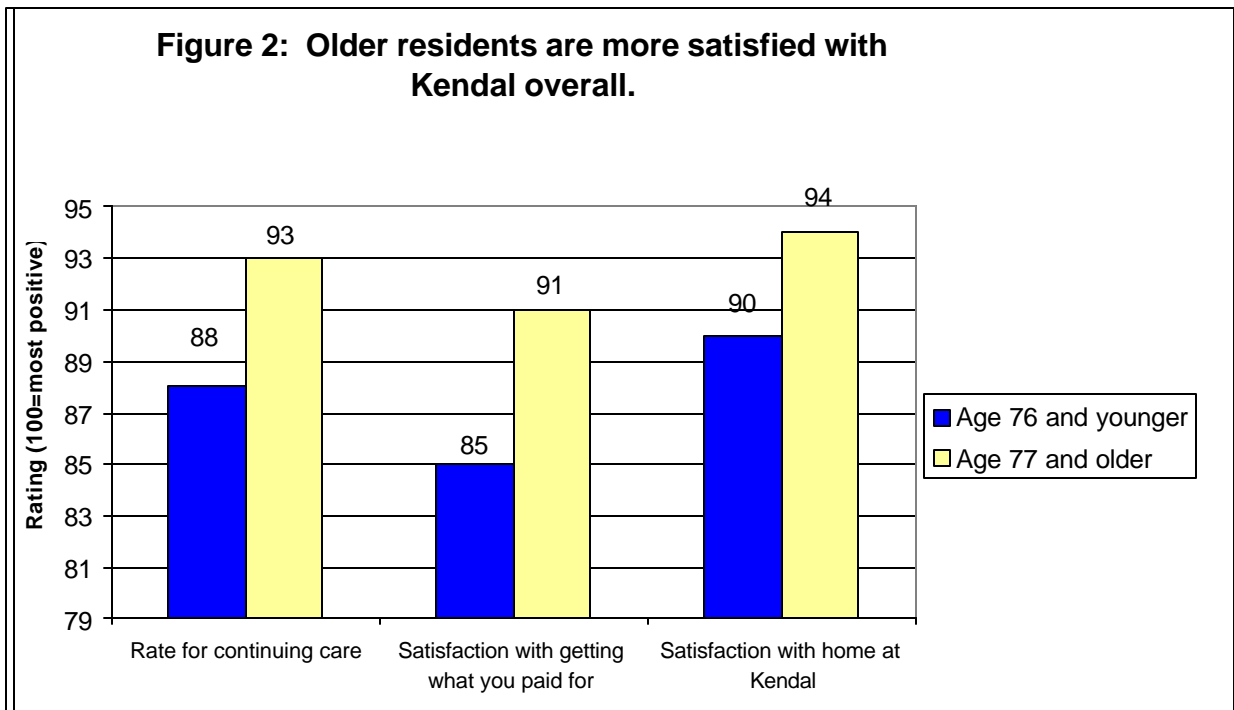


expectations for continuing care and as a retirement community range from 50 to 100, while satisfaction with their home at Kendal has the smallest range (70 to 100). The ratings do not differ significantly by gender, marital status, or by whether residents came from the local area. However, older residents reported the greatest satisfaction with Kendal’s continuing care, with getting what they paid for, and with their home at Kendal (Figure 2).

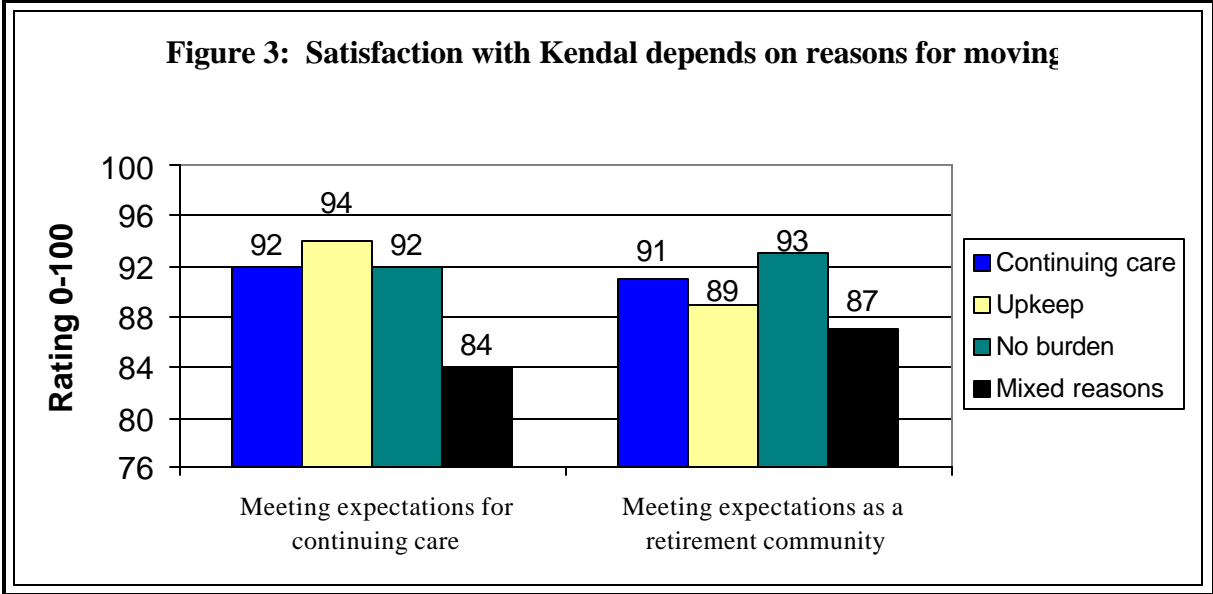
The degree to which living at Kendal meets residents’ expectations for continuing care varies according to their reasons for moving (Figure 3) [See page 6].

Those who said they were moving to Kendal for a mix of reasons in the first interview gave the lowest average rating for continuing care following the move, while those who said they were moving to Kendal to avoid home upkeep gave the highest rating in the second wave of interviews.

Satisfaction with Kendal also seems to depend on the type of com-

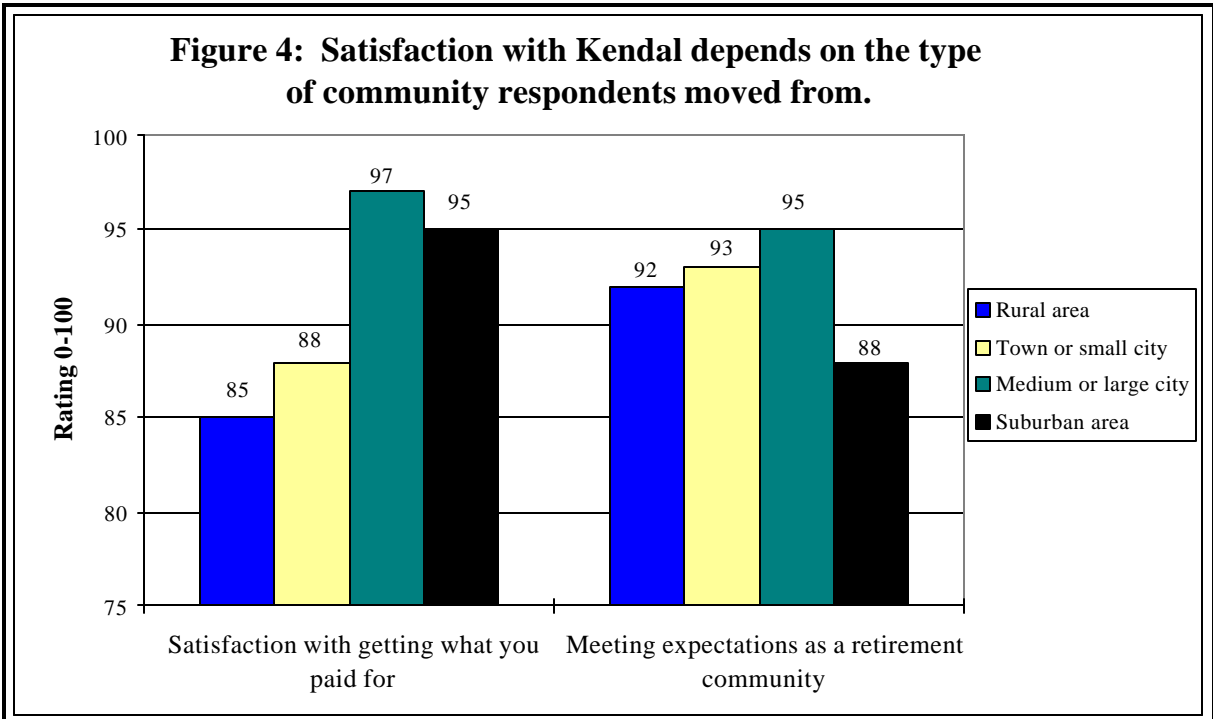


**Figure 3: Satisfaction with Kendal depends on reasons for moving**



community residents move from (Figure 4). The highest ratings were given by respondents who had moved to Kendal from from medium or large cities (an average of 97 getting what they paid for and 95 for Kendal as a retirement community). Those who moved to Kendal from rural areas were the least satisfied with getting what they paid for (average rating of 85). Re-

**Figure 4: Satisfaction with Kendal depends on the type of community respondents moved from.**

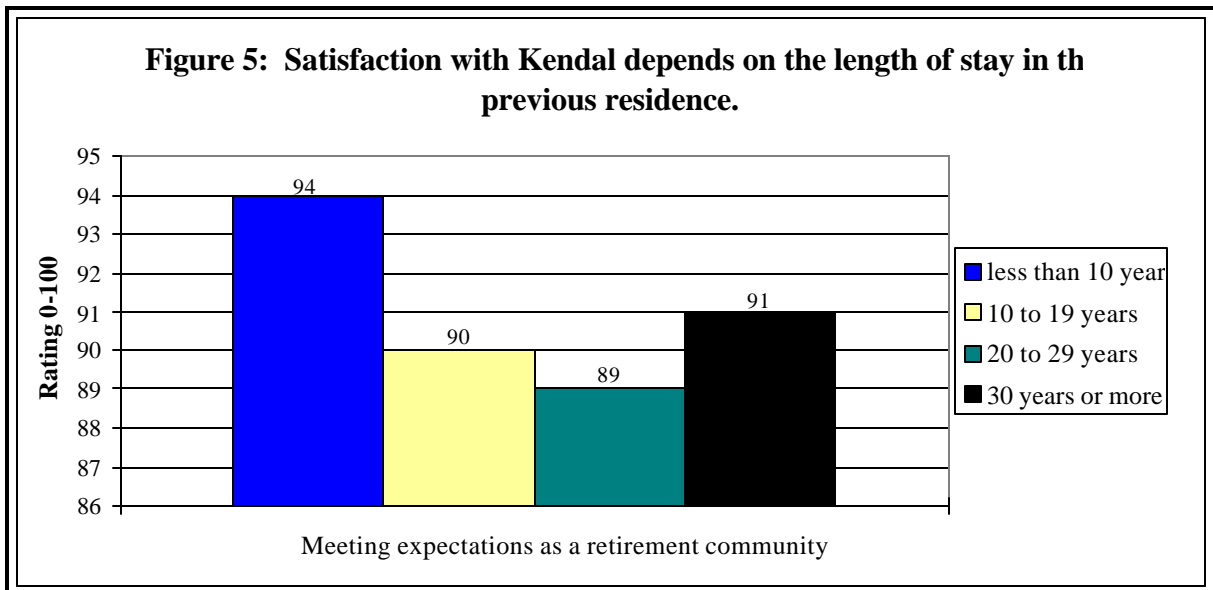


spondents who moved to Kendal from suburban areas gave lowest rating for Kendal as a retirement community (88 on average). Still, all of these ratings are quite high, suggesting general satisfaction with what respondents are paying for and a feeling that respondents' expectations are being met.

We also find that residents' ratings of Kendal as a retirement community varied according to the length of stay in their previous residence (Figure 5). Respondents who lived in their previous residence for less than 10 years report that Kendal is meeting their expectations better than those who lived in their previous home 10 years or longer.

### **Satisfaction with Features at Kendal**

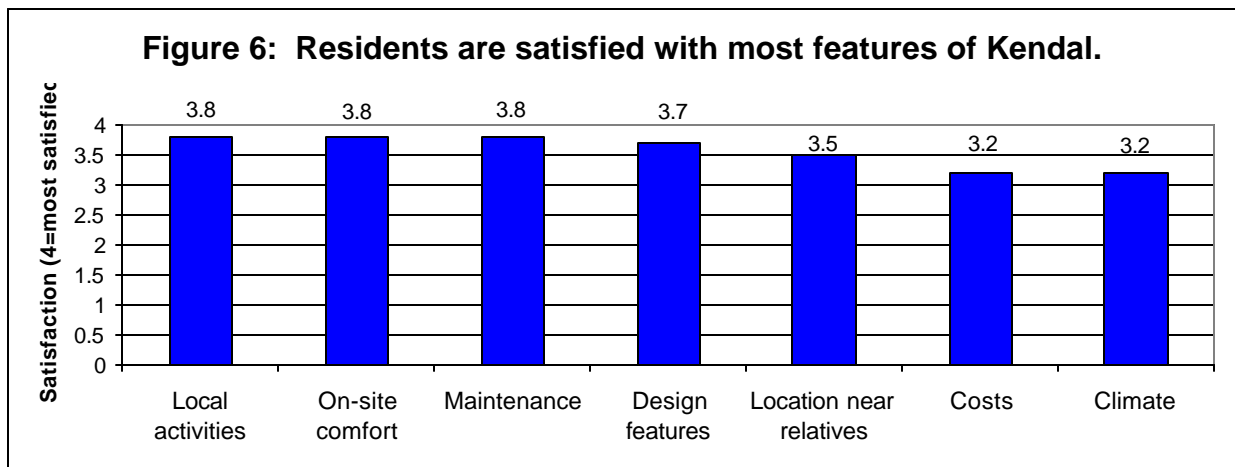
Respondents were asked to rate on a scale of 0 to 4 their satisfaction with 22 individual features of life at Kendal. A factor analysis reduced these 22 individual to 7 factors:

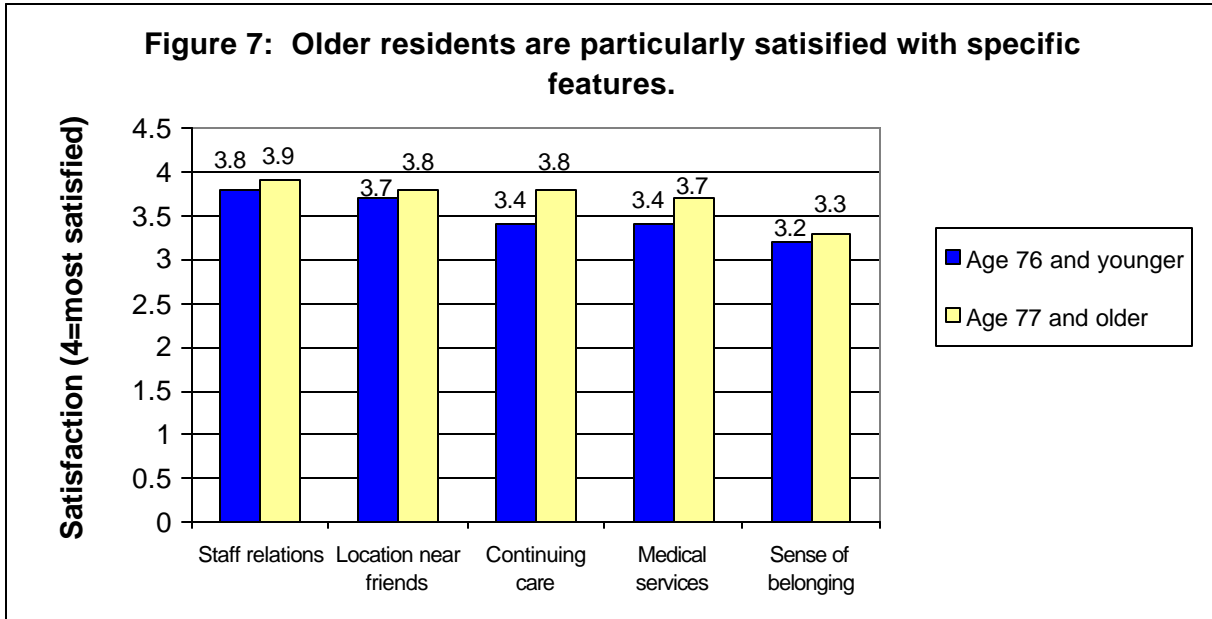


- Local activities (includes local activities, Kendal activities, location in town, and security);
- On-site comfort (includes geographic area, on-site services, and compatible people);
- Maintenance;
- Design features (includes design features and kitchen facilities);
- Location near relatives;
- Costs; and
- Climate.

The average ratings for the seven factors (Figure 6) indicate a high level of satisfaction; no individual factor averaged a rating of less than 3.2 out of 4.0. The highest average rating (3.8) was given to local activities, on-site comfort, and maintenance; and the lowest (3.2) to costs and climate.

Older residents tend to be especially satisfied with specific features, such as staff relations, location near friends, continuing care, medical services, and a sense of belonging (Figure 7).





## **Housing Design and Quality**

### **Major Concerns Prior to Moving**

Prior to their move, respondents were asked (in the 1995 survey) what specific design features at Kendal concerned them, and what design features of their homes they were concerned about losing. Major issues before the move were: living space (23% of respondents), storage space (30%), and specific features/rooms (17%). However, when residents were asked following the move (in 1997) about design concerns and specific features they miss at Kendal, none of these issues proved to be a concern. A number of respondents named individual features they miss, but no one feature was mentioned by more than 2 people.

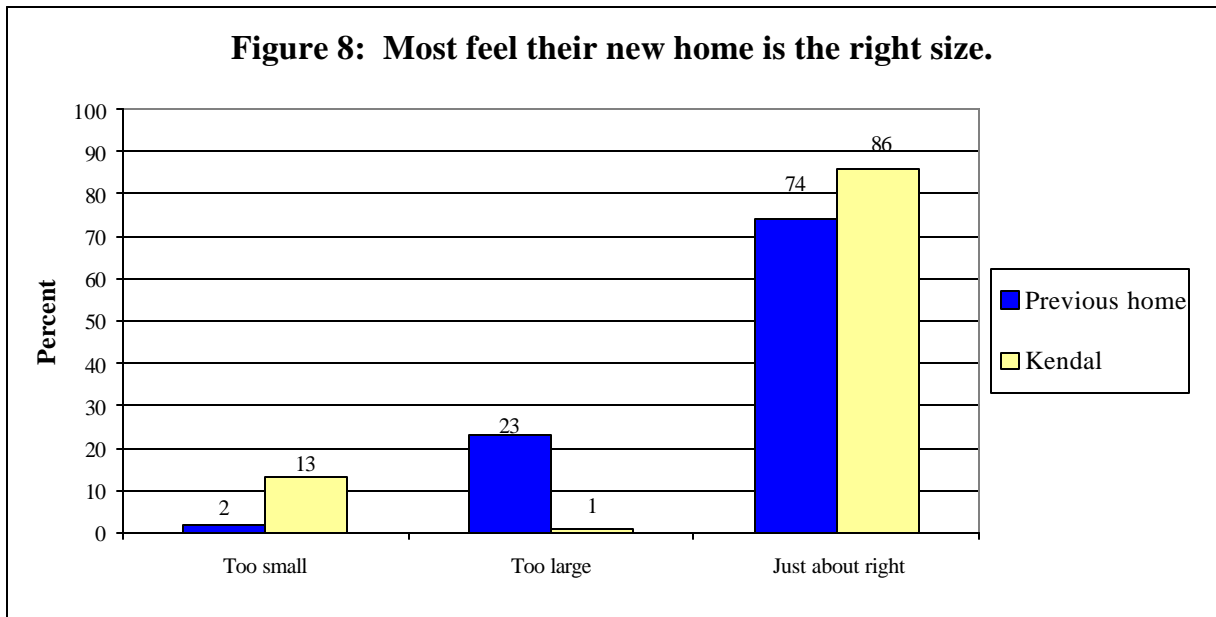
### **Size of the Home**

Although losing space after moving to Kendal was a major concern before the move, most new Kendal residents surveyed in 1997 consider the size of their homes at Kendal to be “just about right” (86%). In

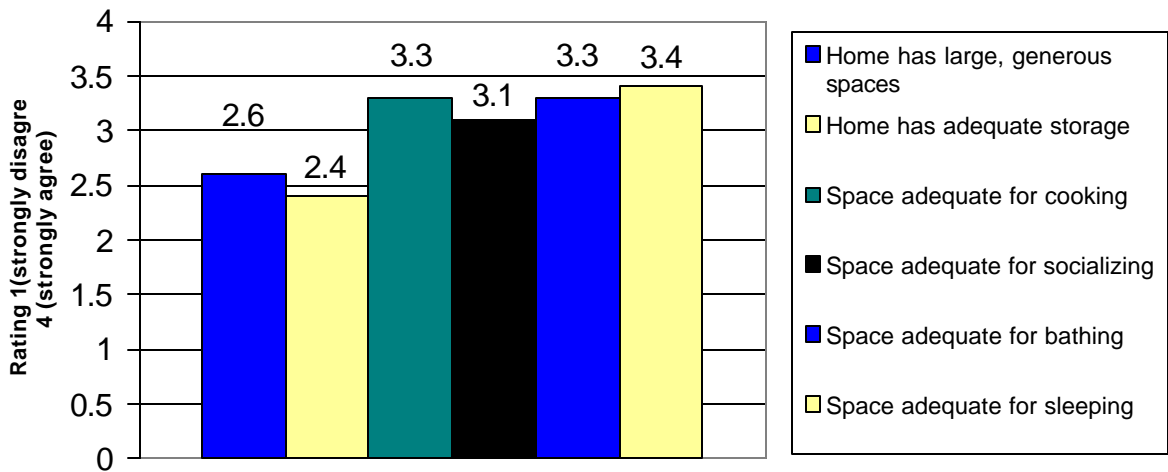
fact, more people feel their home at Kendal is the right size than think their previous residence was the right size (Figure 8). Only 13% of all 1997 respondents find their Kendal home to be too small.

### **Adequacy and Convenience of Space**

Respondents were asked to rate on a scale of 1 to 4 (where 1 is strongly disagree and 4 is strongly agree) whether they find space at their Kendal home generous and whether they have adequate storage space. Further, they were asked to give similar ratings of space adequacy for four vital purposes: cooking, socializing, bathing, and sleeping. The overall average rating of the generosity of space and adequacy of storage at Kendal was 2.6 and 2.4, respectively, suggesting some desire for additional space (Figure 9). However, the ratings of space adequacy for specific tasks were higher (ranging from 3.1 to 3.4).



**Figure 9: Space at Kendal is adequate for most purposes.**

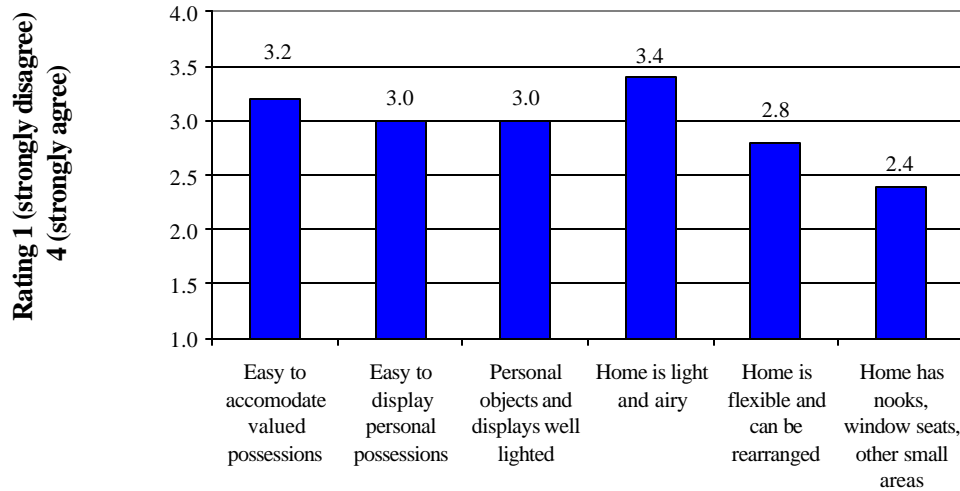


Respondents were asked to rate the convenience of space in their new homes on the same scale of 1 to 4. These characteristics include, first, convenience of space for accommodating valued possessions (such as furniture and rugs) and displaying personal possessions (such as shelves and wall surfaces). Both of these characteristics received average ratings of 3 or higher (Figure 10) [See page 12], as did the lighting of personal objects and the rating of Kendal homes as light and airy. In other words, most respondents see their home at Kendal as convenient on a variety of dimensions.

### **Appeal of Design**

Respondents also give high ratings to a number of design characteristics (Figure 11) [See page 13], including complexity of details and arrangements, simplicity of rooms' appearance, smell, and cleanliness. Also, despite the concerns of some respondents before they moved (in 1995), results show that most new residents in our sample feel that their home at Kendal appears lived in and reflects their personal identity, character and personality. A few residents also liked such features of Kendal homes as high ceilings and sky-

**Figure 10: Space is also convenient for many purposes.**



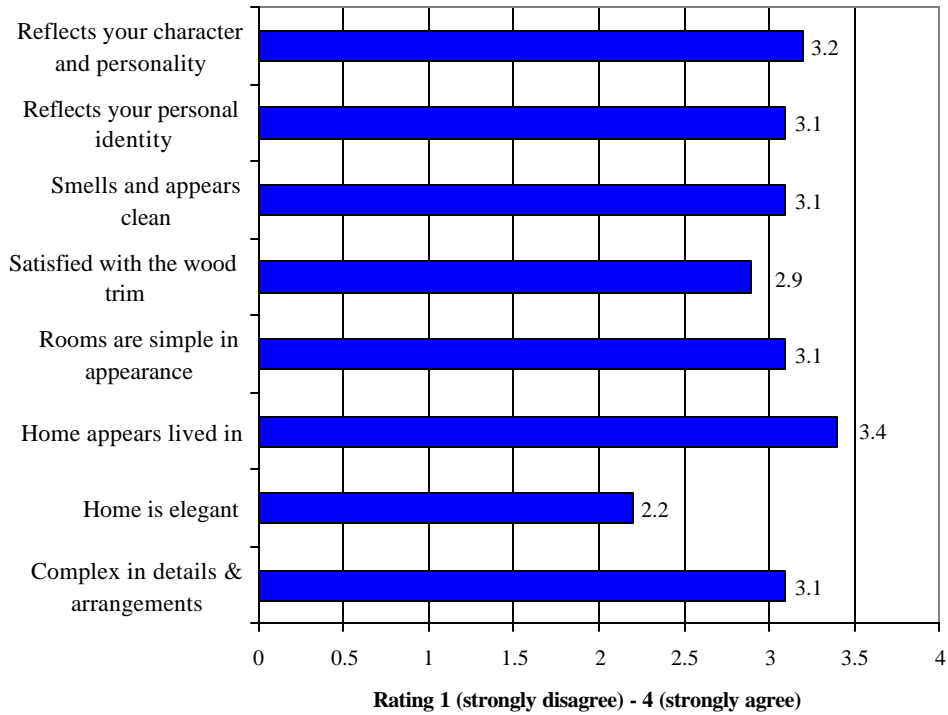
lights. However, they report less satisfaction with the “elegance” of their home at Kendal.

### **Physical Condition**

Respondents were asked identical questions about the physical condition of their homes both before and after the move to Kendal. Both their previous residence and their Kendal home have similar good quality in heating, location of fuses or circuit breakers, and availability of electric outlets. Hardly any respondents in either 1995 or 1997 had heating problems, fuse or circuit breaker problems, or reported having a room without a working electrical outlet. While some respondents (17%) had trouble with mice or rodents in their previous homes, this problem was not reported at all following their move to Kendal.

However, for four components of physical condition respondents reported poor quality both in their previous residences (in 1995 survey)

**Figure 11: Respondents find many Kendal design features appealing.**

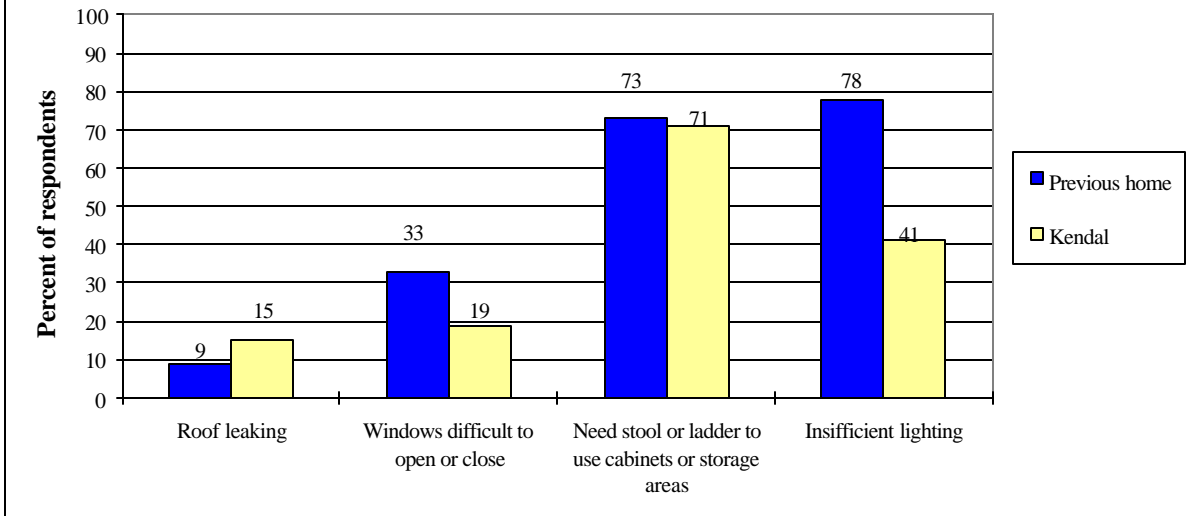


and in their home at Kendal (in 1997 survey) (Figure 12). In their previous homes, 9% of respondents had a roof leak within the past year and 15% reported a roof leak in their Kendal home. Most respondents (73%) needed a stool or ladder to use any cabinets or storage areas in their previous homes, and at Kendal the proportion is similar (71%). One-third of respondents (33%) used to have windows difficult to open or close; this declined to 19% of respondents in their Kendal homes. Finally, while 78% had inside and/or outside areas where the lighting was insufficient before moving, this proportion at Kendal decreased to 41%.

### **Adjustment to Kendal**

We asked a series of questions in the 1997 survey to obtain information about respondents' adjustment to Kendal. First, we asked respon-

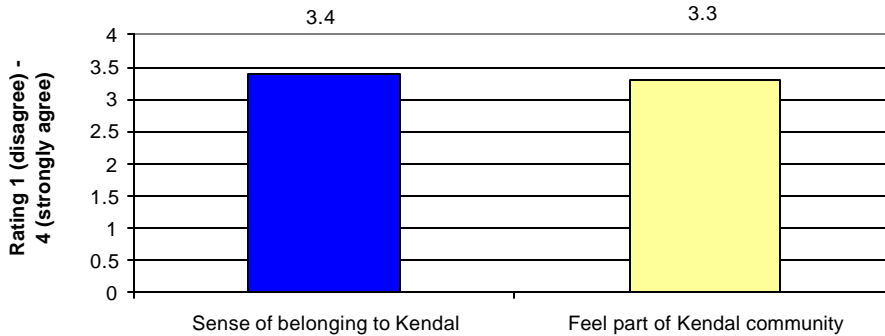
**Figure 12: Housing quality problems decrease with move to Kendal.**



dents to rate on a scale of 1 to 4 (from 1=strongly disagree to 4=strongly agree) whether Kendal is where they belong and whether they feel a part of the Kendal community. We also asked them to assess on the same scale whether it is difficult for them to think of Kendal as their home, whether they feel more socially isolated at Kendal, and whether it will take a while for them to put down roots at Kendal. The average ratings of a sense of belonging and feeling part of the Kendal community are presented in Figure 13: both are quite high (3.3 and 3.4, respectively). This indicates that the majority of respondents feel quite strongly that they belong to Kendal and are part of its community.

The three average ratings of difficulties of transition in Kendal are displayed in Figure 14: all three are 2 or lower. This means that most respondents find it relatively easy to call Kendal home, that they do not feel more socially isolated there, and that they do not expect that it will take

**Figure 13: Most residents feel they belong at Kendal and feel part of the community.**

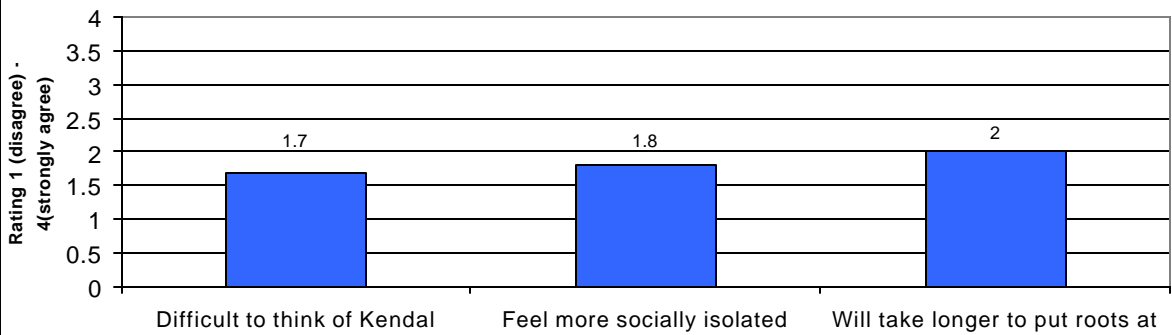


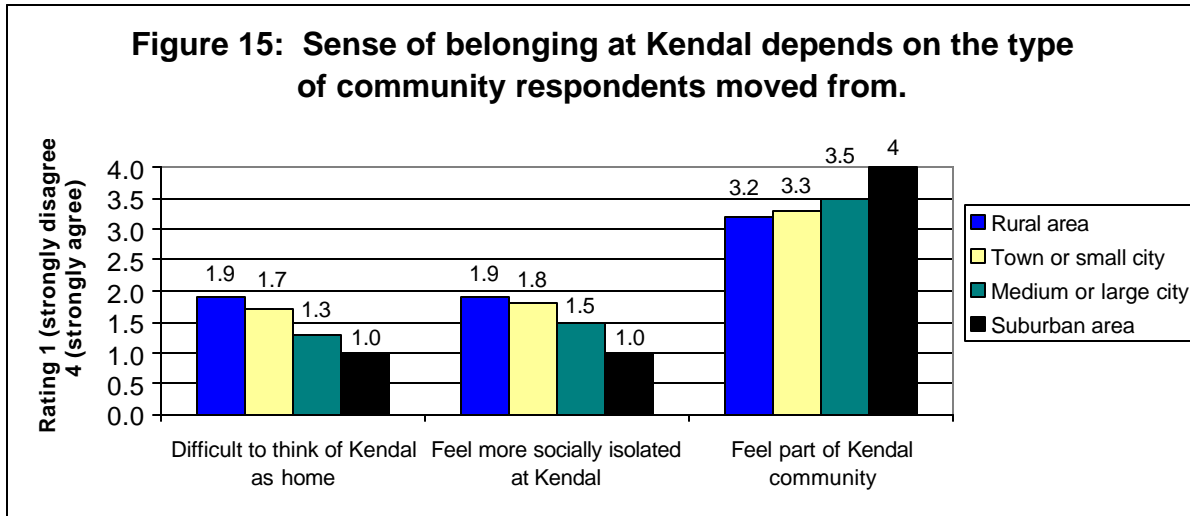
them longer to put down roots at Kendal.

We found no differences in these adjustment scales by age, gender, or length of stay in previous homes. However, three adjustment scales are strongly related to the type of community from which respondents moved to Kendal (Figure 15).

On a scale of 0 to 4, very few respondents report that it is difficult to think of Kendal as their home or that they feel isolated. However, residents who moved to Kendal from rural communities find it most difficult to think of Kendal as their home and feel most socially isolated. They also

**Figure 14: Few report significant difficulty adjusting to Kendal.**



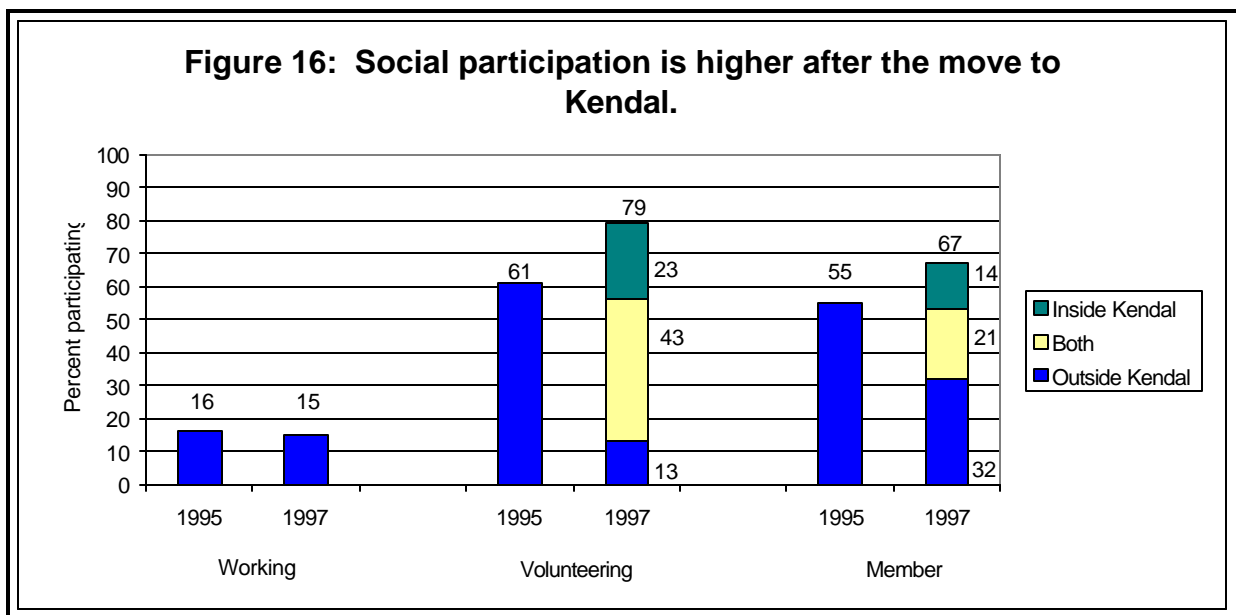


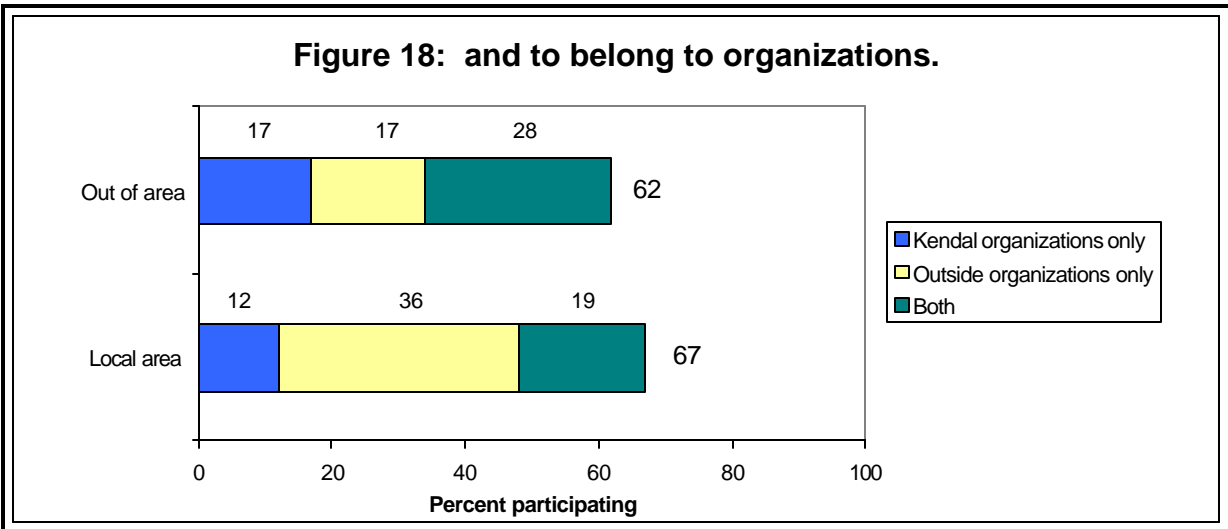
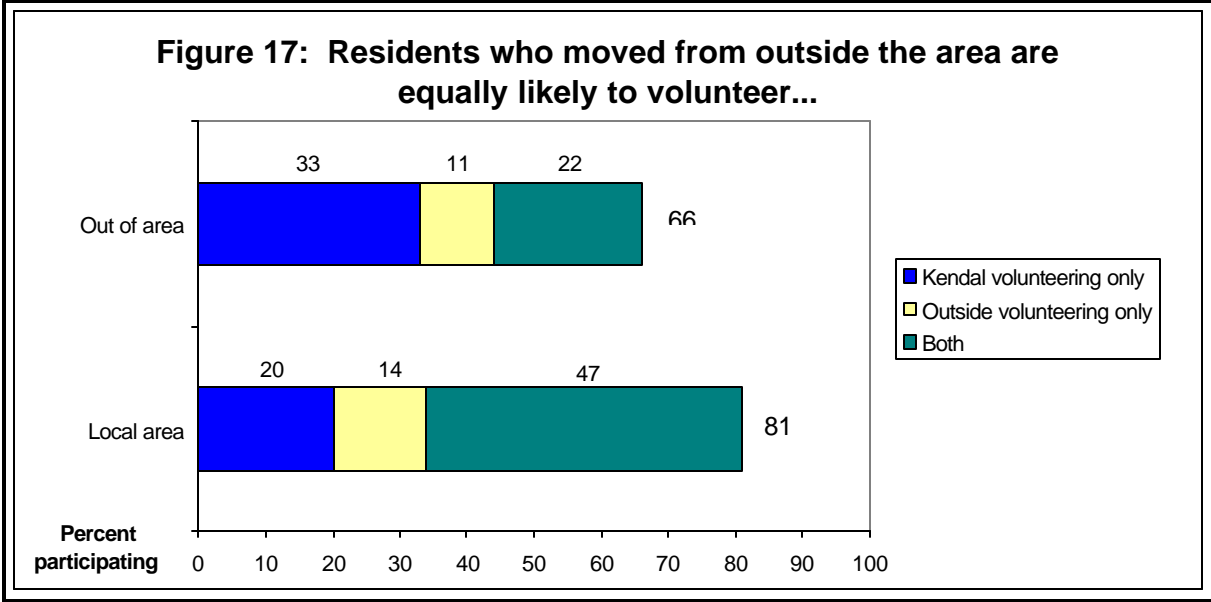
are somewhat less likely to feel part of the Kendal community. Residents who came from towns or small cities are next in terms of difficulties of adjustment and feeling part of the community. Residents who moved from medium or large cities give second lowest average ratings on the difficulties of transition, and second highest rating on feeling part of the community. Residents from suburban areas give lowest ratings on the transition difficulties and highest rating on feeling part of the community, suggesting that their adjustment was easier.

## Social Participation

Respondents in 1995 (before move) and 1997 (after move) were asked whether they were working for pay at the time of the interview; whether they were doing volunteer work; and whether they participated in any social, political, or service clubs or organizations. We term these three types of social participation were called "working", "volunteering", and "membership", respectively. Proportions of respondents participating in each of the three activities are displayed in Figure 16.

While the proportion of respondents working for pay remained almost the same after moving to Kendal (16% in 1995 and 15% in 1997), overall participation in volunteering actually increased from 62% to 79%, and membership in organizations increased from 55% to 67%. These increases hold across gender, marital status, and age groups. Volunteering outside Kendal, however, decreased a bit from 62% to 56%, while membership in organizations outside Kendal increased from 46% to 53%. Residents who moved from within and from outside the local area are equally likely to volunteer at Kendal (Figure 17) and are equally likely to belong to organizations (Figure 18). However, residents from outside the area are less likely to be volunteers outside Kendal.





**Future of the Project**

This description of early findings provides a flavor of what our project is about. By looking at expectations before the move and the realities following the move, we can learn much about residential transitions in later adulthood. This is the first study of its kind that has such “before” and “after” measures. What began as a relatively small-scale study of one housing option (the move to Kendal) has now ex-

panded into a major longitudinal study of approximately 800 people age 60 and over, examining a wide range of housing options. The interviews of almost 100 Kendal residents has become our pilot study. In 1997 and 1998, more than thirty undergraduate students from Ithaca College and Cornell University will interview approximately 700 additional individuals. About 300 of these people will be living in facilities such as Kendal, Ithacare, Titus Towers, and McGraw House. Also included in this group are people who are on the waiting list for housing at Longview. The remaining 400 people will be living elsewhere in Tompkins County. We plan to interview these 800 respondents every two years. These interviews will permit comparisons among different residential arrangements and moves, data that will be invaluable for researchers concerned with the well-being of individuals in later life. Above all, we are very grateful to the Kendal residents who graciously shared their lives with us – without them this project would not have been possible.

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