

Going all-in for wellness

How to fully commit
to the reality of a
wellness-based
community

International Council on Active Aging[®]
January 2023

Forum Partners:

About the ICAA Forum

The ICAA Forum brings together thought leaders from many organizations—both private and public—to form a think tank that develops strategies to turn the challenges facing senior living providers into opportunities. Launched in 2005, the meetings forge connections among industry leaders while promoting understanding and cohesive action around the ultimate goal: health and quality of life as people age.

www.icaa.cc/conferenceandevents/forums.htm

Organizer: Colin Milner, CEO, International Council on Active Aging, colinmilner@icaa.cc

Facilitator: Tom Kehner, theDifference Consulting, <https://thedifferenceconsulting.com/>

Report author: Patricia Ryan, Content Development, p3ryan@cox.net

Design: Jacob Benaroch, www.benaroch.com

About International Council on Active Aging®
www.icaa.cc

The International Council on Active Aging has led, connected and defined the active-aging industry since 2001. Founded in the belief that unifying the efforts of organizations focused on the health and well-being of older adults benefits both the people they reach and the organizations themselves, ICAA's vision is shared by over 10,000 organizations. ICAA's support of the active-aging industry includes industry research reports, program development, market development, education and research on healthy aging and wellness, strategy development, public relations campaigns and recognition programs.

ICAA Education, Inc., a sister company, develops and delivers courses to help active-aging professionals build needed skills and knowledge to impact older-adult wellness and the business bottom line.

International Council on Active Aging
#603 - 1112 West Pender Street
Vancouver, BC, Canada V6E 2S1
866-335-9777 or 604-734-4466

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EXECUTIVE SUMMARY

Go all-in at every stage of the wellness journey

Throughout the senior living and care industry, executives are rethinking business models to ensure their organizations will grow and prosper. Instead of returning to the assumptions and models in place before the pandemic, the new thinking centers on integration among operations, opening doors to nearby communities and enabling family members to be more active partners in a resident's life and care.

All of those approaches are reflected in a wellness culture. Wellness touches all areas of a person's life, tying together the services, care and programs that are offered. Wellness has also been shown to bring in direct and indirect revenue, control expenses and help maintain the holy grail of senior living: stable occupancy.

Some communities may be thinking about wellness, while others have started integrating the wellness philosophy into their cultures. To provide direction at every point along the journey to a wellness culture, senior leaders at the ICAA Forum, hosted by the International Council on Active Aging,[®] adapted the process framed in the Transtheoretical Stages of Change model to identify action steps that organizations can use to successfully transition to a wellness culture.

Each stage of wellness development scaffolds to the next, providing a firm foundation that remains in place along the progression.

Stage 1. Precontemplation. There is no awareness of wellness as a business strategy.

- *Actions:* Assess the organization's values and future positioning. Conduct an environmental assessment of the industry, potential residents and customers.

Stage 2. Contemplation. Wellness culture is being seriously considered as a way to help move the organization forward.

- *Actions:* Recognize the value proposition of wellness, consider it in the context of the organization's future and blend in insight from the environmental assessment. Write a wellness vision statement, and gather the data needed to complete a wellness feasibility study.

Stage 3. Preparation. Plan the steps to implement wellness as a cultural imperative.

- *Actions:* Align the wellness vision with all board members, executives and managers. Include wellness in the strategic plan. Conduct a wellness audit of the people, place and programs that support wellness goals, and integrate the feasibility study into the wellness business plan. Create a wellness playbook to guide staff, managers, wellness champions and executives.

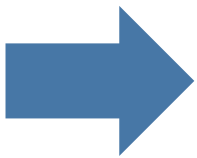
Stage 4. Action. Implement plans in all areas to operationalize wellness.

- *Actions:* Roll out elements of the plan, monitor results, expand successful implementations and change or replace less successful outcomes.

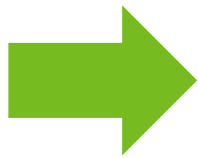
Stage 5. Maintenance. Sustain a stable and growing wellness culture.

- *Actions:* Deliver the messaging around wellness through all interactions: staff-resident, resident-resident, staff-staff and staff-nonresident. Renew the words and actions as a foundation of the culture. Act upon the wellness metrics, celebrating successes and refining initiatives.

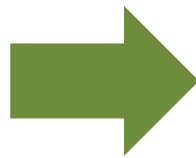
STAGES OF THE WELLNESS JOURNEY



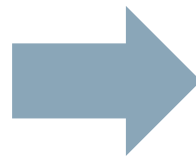
Stage 1.
Precontemplation.
There is no awareness of wellness as a business strategy.



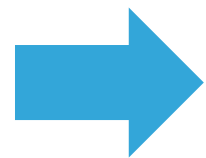
Stage 2.
Contemplation.
Wellness culture is being seriously considered as a way to help move the organization forward.



Stage 3.
Preparation.
Plan the steps to implement wellness as a cultural imperative.



Stage 4.
Action.
Implement plans in all areas to operationalize wellness.



Stage 5.
Maintenance.
Sustain a stable and growing wellness culture.

Wellness is a long-term strategy that looks to the future while respecting the past. Forum colleagues pointed out the characteristics of the leadership and staff members who promote an active, vibrant community that encourages quality of life for each resident. To move along the wellness journey, look for:

Vision. Who is visionary on the board, on the wellness team?

Commitment. A culture shift is a long-term process of structural and behavior change.

Confidence. Culture change can occur, and wellness is worth the effort.

Future focus. Business models developed before the pandemic no longer apply, the environment has changed too much.

Wellness is a philosophy, a way of thinking and doing things that impacts all areas of a person's life. From the moment residents, family members, staff members and volunteers walk through the door, they are affected by the physical space and atmosphere. They wonder if this is a place where they *want* to be until they *need* to be.

It is time to move beyond talking about wellness—the philosophy that ties together the hospitality, care, services and programs—and start implementing it.

THE JOURNEY

The wellness journey begins now

How prepared is your organization for the new world of senior living? In board rooms and cluttered offices across the industry, the leadership is wondering how to adapt to current realities. Staffing is hard now, and not likely to get much better. Younger-older adults may not be interested in, or able to afford, older models of luxury senior living. Pressures are increasing on prepandemic business models. Fulfilling mission in today's environment requires an approach that respects the past while embracing the future.

The updated models of senior living weave together community opportunities and family relationships. Concepts that make it easier for family members to help with care are being crafted. Stronger, interdependent relationships among residents, family members, neighbors and community services may seem radical. But these changes help reduce the need for staff and either limit the need for amenities or open the doors for nonresident access and revenue. A long-term, sustainable model emerges.

Wellness is derived from our ability to understand, accept and act upon our capacity to lead a purpose-filled and engaged life. In doing so, we can embrace our potential (cognitive/intellectual, emotional, environmental, physical, professional/vocational, social, spiritual) to pursue and optimize life's possibilities.

A wellness culture involves all leaders and staff members, in every role and department, along with the older adults they serve, in providing services and experiences that enable older adults to participate in life-affirming choices that include the dimensions of wellness.

Wrapped around this renewed model of mission delivery is the philosophy of wellness: that all areas of a person's life are intertwined, and therefore every option for food and beverage, social encounters, healthcare, fitness, lifelong learning, package delivery and a pleasant or unpleasant interaction is wellness.

There are good reasons why communities are expanding their services, adding multidimensional wellness to their operations and integrating wellness with healthcare.¹ A wellness-based community impacts mission and business, resulting in longer lengths of stay, healthier residents and positive move-in and retention trends. Wellness is a strategy for containing costs, generating ancillary revenue, and creating a positive environment where people want to live and work.^{2,3,4}

Some organizations plan large-scale transformational change that responds to a shift in the market or industry, leadership or strategy. Others move incrementally, implementing a single business strategy or infrastructure change, such as installing a new computer system.⁵ Wherever a community falls along the range, from transformation to small-scale adaptations, changes for leadership, staff members, residents, customers and vendors will follow.

It's not surprising that many managers and staff members—not to mention residents—are tired of change. As the pandemic evolved, senior living and care ping-ponged among public health guidelines, national and local regulations and individual attitudes. Change fatigue set in, likely increased by staffing shortages that mean fewer people doing more work.

Yet, practical steps for managing change are already in place due to the quick shifts made during the years of physical distancing and COVID restrictions. Departments crossed silos to help one another; budgets were reallocated, innovative ideas for food service and programming went into action. These same tactics can set the stage for developing a wellness culture.



When you fully commit to an action, you go all in—giving it everything you have to achieve the end result. Recognizing that every community or building within a community is often at a different starting point, colleagues at the ICAA Forum, hosted by the International Council on Active Aging®, answered the question: “What must occur within your community to go all-in with wellness?”

By adapting the Transtheoretical Stages of Change model⁶ to senior living, Forum delegates divided into teams to identify the beliefs and actions that must occur at each stage of the wellness journey. A double benefit is that following the action steps closes the gaps between the priority actions needed for wellness culture and the organization's effectiveness in implementing them.

In a survey conducted by ICAA, nearly all respondents (90%) rated four elements as the most important priorities for wellness culture: (1) board members' recognition of the value of wellness, (2) senior leaders are knowledgeable about wellness, (3) executives believe wellness has ROI, and (4) staff in every department support wellness. Yet, only about half of the respondents believed the organization was effective in acting upon these priorities.⁷

Just as individuals who successfully change their behaviors transition through each stage, so organizations that follow the process are more likely to accomplish the all-encompassing organizational change to wellness culture.⁸

Stages along the wellness journey

Each level of living, each department and each building may be at a different stage on the wellness journey. Just as the person-centered philosophy recommends meeting each person where they are, look at each area as an individual entity to find the stage where the culture is at.

It does not matter where an organization begins, but it does matter that the actions in each stage are followed. Research has shown that moving sequentially through stages has more impact than jumping from thought to action. Initiatives developed at each stage may likewise be more effective than one-size-fit all programs.⁶

Stage 1. Precontemplation. There is no awareness of wellness as a business strategy. The understanding of wellness is limited to a department and there is no acknowledgement of wellness philosophy.

Action steps: Study trends, compare offerings of other organizations and assemble population psychographics. Build awareness of the “big picture” of wellness as a concept that encompasses every interaction, process and service at the organization.

Stage 2. Contemplation. There is recognition that the organization needs to change to adapt to population trends, labor shortages and economics. There is a growing awareness that the wellness philosophy is a value that can underlie every operation and position the organization for the future.

Action steps: Expand on wellness as a mission-focused, person-centered concept that is shown to attract new residents, keep current residents healthy, and indirectly support revenue. Summarize the findings of the survey of industry trends and competitive analyses. Propose the value proposition of wellness to make the case, then construct a vision for wellness. Support the value by drafting a wellness feasibility study.

Stage 3. Preparation. Wellness is in the strategic plan because board members and the leadership team are aligned with the wellness vision, recognizing that the potential for the organization is great. Plans are being formed to implement wellness as a cultural imperative. The wellness vision will be implemented with short-term and long-term strategies and tactics.

Action steps: Form a wellness implementation team, including members from all staff roles and residents. Structure the team with permanent and adjunct members. Conduct a wellness audit to identify what is

Each stage builds to wellness culture					
					Wellness culture
					Implementation
					Strategy, plans
					Board, leadership
					Future, identity
1	2	3	4	5	
Pre-contemplation	Contemplation	Preparation	Action	Maintenance	

and is not available or needs improvement. Write a business plan using data from the wellness feasibility study and wellness audit. Indicate the short-term, midterm and long-term activities. Finalize the wellness messages and talking points that will be shared by executives, managers, team leaders and wellness influencers. In a wellness playbook, compile the purpose, messaging, players, activities and outcomes. (See a format in the Appendix.)

Stage 4. Action. The business plan is realistic, the board and leadership team are aligned with the wellness vision. Following a wellness playbook, each department is taking action to implement wellness throughout operations, staffing, services and programs. Wellness outcomes are identified and a process is in place to track and report results.

Action steps: Commit time, resources and energy to roll out the wellness vision, explaining the value and

benefits. Launch a few items on the to-do list, monitor and evaluate results. Train staff members on setting wellness goals, and use technology as a tool to track outcome metrics. Wellness improvements are celebrated and inspirational stories are shared.

Stage 5. Maintenance. There is a revitalized atmosphere of purpose and positivity. Residents are healthier and happier, and new people visit and move in to the community. An ongoing, robust wellness culture circulates through all departments and service areas. The stable and growing wellness culture is monitored and updated to keep the community moving forward.

Action steps: Timeline regular check-ins on how effectively wellness culture and programs are being conducted. As outcomes are tracked and matched to goals, evaluate results and continue, change or eliminate an action. Celebrate success, and keep adding and revising.

Action steps along the wellness journey				
1	2	3	4	5
Precontemplation	Contemplation	Preparation	Action	Maintenance
<i>Aspirations</i>	<i>Vision</i>	<i>Planning</i>	<i>Operations</i>	<i>Sustaining</i>
Organizational assessment of values	Value proposition of wellness	Strategic plan includes wellness	Wellness playbook	Wellness metrics collected and evaluated
Environmental assessment of industry, potential residents, customers	Wellness vision	Wellness implementation team installed	Team leaders aligned with vision	Messaging is continual and renewed over time
	Wellness feasibility study	Wellness audit of people, place, programs	Staff champions and resident champions facilitate rollout	Wellness audit repeated at intervals
		Wellness business plan		Playbook updated
		Playbook drafted		

Jump start the shift to a wellness culture

The wellness culture extends familiar person-centered and people-first philosophies to everybody and everything in a community. Applying the person-centered philosophy to change is an appealing approach because it is familiar to most people working in senior living and, like the wellness philosophy, focuses on individuals.

Throughout the journey, reach out to the individuals who will be affected by the change. As psychologist Hany Malik notes, “change is only possible if the people in the company embrace it.”

Malik recommends five principles to guide change: (1) explain the change using a complete story, (2) clearly communicate what’s in it for each person, (3) communicate as much as possible to avoid surprises, (4) involve team members at all levels, and (5) connect the change to the purpose and mission.⁹ His recommendations, along with others, enliven the practical steps in the wellness journey.

Tell a good, complete story. What is the reason for the change? What value will it bring to residents, to workers, to the future of the company? Announce the change by relaying the big picture of the rationale and steps that will be taken. At the same time, stress continuity by outlining what is not changing so people know there is stability. Relate the change to delivering on the purpose of the organization.¹⁰

A simple way to outline the value of the change is to borrow Gartner’s From/To/Because model. “From” is the status now, “To” is what wellness will change, and “Because” is why. This fits neatly in three columns in a table.¹¹

Communicate clearly, often and transparently.

Tell the story, tell it often and share the challenges. Be clear on what worked well, what did not work well, and how plans will be revised to improve outcomes.

Move from the top down. Board members and executives must be aligned with the need for a wellness culture and appreciate how it will drive the business objectives and sustainability of the organization. Wellness is a long-term strategy, which means decision-makers need to stay aligned to the vision, and share the value of the vision with funding sources.

Form cross-department teams. Place people from each department on the wellness implementation team, and on permanent cross-departmental teams with a limited set of common goals and metrics. When people work together, the culture is more likely to shift as they adopt new processes to achieve the goals.^{12,13} Remember, departments crossed silos to help one another during the pandemic.

Move from the bottom up. The people staffing the kitchen, housekeeping, care and lifestyle areas are deeply affected by a changing culture. Blend people in staff roles with more experienced managers on the wellness implementation team. Ask their opinions, listen and act on their replies. Be sure staff members at all levels are among the influencers promoting the wellness concepts.¹⁴

Commit the needed time, people and resources. Change initiatives take time to develop, plan and implement. Change is more successful when enough people are assigned to the project and have the technology, training or colleagues providing the services they need. For example, accounting staff or the leaders in dining and healthcare are accustomed to thinking long-term, determining outcomes and measuring results.



Measure and fine-tune results. At every stage, how will you measure results? There are many wellness-oriented metrics used in senior living communities (see the Appendix). Cross-departmental teams can provide some, others may be new. Make a plan, but be willing to adjust when an action doesn't work out as expected. Modify, make changes and move forward.¹⁵

Think out of the box. Assume you have just joined the community. You do not know anything about current operations, but you do know the purpose of the organization and the mission. What would you do?

Map the journey with a wellness playbook

The action steps in each stage provide the information to write a wellness playbook for the organization. The playbook for wellness will include the vision, policies,

operating procedures, responsibilities, roles, performance indicators and metrics that enable the wellness culture.¹⁶ The playbook helps to align everyone in the organization and answers the “how-to” questions. When there are new directions and new staff members, the playbook is the guide to ensure the plan is carried out.

The playbook includes some of the same elements as the wellness business plan, but it is aimed at those implementing the wellness culture, including staff members, managers, residents, partners and executives. In the playbook, recognize that wellness is for all departments and services, not a single person or area.

Developed at each stage, the playbook keeps wellness alive even when the environment and staffing changes. An example of categories to include is in the Appendix.

Case Histories: Rancho Mission Viejo and Willow Valley Communities

How would a community move through the stages of change? To share the stories of how Rancho Mission Viejo and Willow Valley Communities recognized the value of wellness and implemented their visions, Paul Johnson, Executive Vice President – Community Development at The Ranch and Helen Foster, Owner/Principal and Strategist at Foster Strategy, outlined the steps followed by the organizations.

Mission anchors the wellness vision

At Willow Valley Communities, a large not-for-profit Life Plan community in Pennsylvania, the mission reflects the importance of quality of life for the residents. The organization's success, says Helen Foster, longtime strategic advisor to Willow Valley Communities, is rooted in a firm commitment to its mission: *"We inspire each person to embrace the possibilities of a life lived forward."*

Part of the development process was investigating the local area, looking at best practices and giving thought to how people would navigate the community given their different approaches to lifestyle and different mobility capacities.

Foster credits John Swanson, CEO of Willow Valley Living and Willow Valley Development Corp., for pushing the organization's approach to innovation. An example was partnering to develop a nearby historic market that now features a modern food hall, with 10 chef stations, plus community meeting spaces and offices.

"We are all in the business of wellness real estate," Foster added, "and it's our responsibility to develop spaces that inspire wellness, with a diverse mix of programming that encourages engagement. And, we always have to look at wellness through the lens of the consumer—it's all about personal choice."

From contemplation to implementation

The leadership team at Rancho Mission Viejo, a planned community in southern California, contemplated taking a risk. Could investing in wellness elevate resident satisfaction, increase sales potential and deliver a return on investment? Would adding a

neighborhood of homes for 55+ adults attract homebuyers? And would fine-tuning the approach to wellness appeal to all consumer segments living at the intergenerational community?

To answer those questions, a process of discovery was initiated, explained Johnson. Consultants were brought in to advise on wellness and best practices, and to conduct focus groups and resident surveys. Architects and urban planners were involved. Research on active aging, building design and population expectations was examined. Thinking, debating, redrawing and working on the economics lasted a year, and continues today. "You have to show the owners that this is worth investing in and what the return will be," said Johnson.

The dimensions of wellness were used to anchor the lifestyle philosophy. The planners focused on areas where they saw the highest opportunity for impact, with an emphasis on social interactions, physical activity, nutrition, environmental stewardship and clubs focused on intellectual pursuits and the arts.

To pay for the "RanchLife" programming, a fee is collected when a home is sold or resold and used to fund a 501(c)(4) Community Services Organization,¹⁷ operated by six permanent staff members who organize all the lifestyle and recreation programs. The value of the 501(c)(4) approach is that funding is permanent and does not end as grants or donations do. The Ranch recently introduced an all-ages clubhouse for intergenerational play and had the chance to borrow some concepts from Willow Valley Communities, including an arcade. The arcade has been a valuable asset, Paul said, and it was paid for within six months by the quarters deposited in the games.

The wellness-focused lifestyle was an investment, but the result was worth the effort. Homes in the 55+ Gavilán® neighborhoods are selling because of the amenities, the wellness orientation and proximity to the all-ages neighborhoods. Grandparents, parents and children appreciate being close to one another. And the home prices are an estimated 10-15% higher than they would have been without the investment in wellness.

THE STAGES

“At the very beginning, assess who you are and who you want to do this with. It takes a village to build a residence, and it takes a village to run one and it takes a village of knowledge and money. The village comes together for the most important people we do it for—our residents.”

Judy Freeman, *Crown Group Properties/Prime Time Living, presenting for Team 5*

Stage 1. Precontemplation

There is no awareness of wellness as a business strategy.

What it looks like	There is no awareness of wellness as a business strategy. The understanding of wellness is limited to a department and there is no acknowledgement of the wellness philosophy.
Actions	<ul style="list-style-type: none"> Organizational assessment of values and future Environmental assessment of industry, population of potential residents, customers

Consider:

- Leadership will act if there is something that they want to do, or currently are doing badly.

Organization-level philosophy & culture

- Understand the organization’s philosophy and values. What is the ethical compass?
- Imagine a potential future identity: What is the mission? Where does the board and executive leadership believe the organization will be in five years, 10 years?
- Conduct an environmental assessment of industry trends, best practices, consumers, competition, population trends, national and local economic trends.

Leadership team

- Begin to unfurl preconceived notions of wellness as healthcare or as fitness.
- Discover if leadership is basing plans on the past rather than the future.

Human-level beliefs & attitudes

- Ask residents, family members, staff, vendors and leaders about their expectations.
- Determine how the larger community of potential residents/customers views the organization. Is it a place to live and enjoy life, or a place to stop living?

Financial model

- Outline the proven benefits of wellness: increased length of stay, better health, high levels of satisfaction, willingness to refer.
- Look for gaps in the current funding streams to identify areas where wellness has potential to generate revenue or control costs.

Staffing model

- Speak with and listen to staff members to understand their perceptions of the culture and relationships at the community.
- Inspire a culture of open communication. Do staff members believe the work environment supports their wellness?

“Everyone’s mission statement is probably about serving people. Even if the word ‘wellness’ is not used, go back to the mission statement to gain support. Another way to gain support is fear of missing out. What will happen if we don’t move in the direction of wellness?”

Karen Lloyd, *Friendship Village of Bloomington, presenting for Team 4*

Stage 2. Contemplation

Wellness culture is being considered as a way to help move the organization forward.

What it looks like	There is recognition that the organization needs to change to adapt to population trends, labor shortages and economics. There is a growing awareness that the wellness philosophy is a value that can underlie every operation and position the organization for the future.
Actions	<ul style="list-style-type: none"> • Value proposition of wellness • Wellness vision • Wellness feasibility study

Consider:

- The board of directors must want to promote wellness if it is to be implemented through every level of the organization.
- Feasibility studies may be based on old models established before the pandemic. Revenue model and market potential must be updated to accurately project the impact of wellness across the organization.

Organization-level philosophy & culture

1. State the value proposition of wellness for the quality of life of residents and staff, and for meeting business objectives.
2. Define the wellness vision. What does wellness mean to you, what does it look like?
3. Identify who will develop and implement the vision: Directors, healthcare workers, families, residents, staff members, potential residents, operations staff.

Leadership team

1. Investigate how much individual leaders understand about the broad influence of wellness across all service areas. How much does the leadership believe in wellness?
2. Examine policies and procedures. What organizational directives are barriers to leaders prioritizing and implementing wellness?
3. Buy-in is encouraged by the actions of leadership. Does the team lead from the wellness perspective?

Human-level beliefs & attitudes

1. Define what wellness means and why it is important.
2. Shift the vision of wellness from traditional care to an embedded lifestyle.
3. Identify gaps in beliefs: who does not believe and why?

Financial model

1. Model the return: Is it return on investment (money) or return on objectives?
2. Project return in one year, five year and 10-year scenarios.
3. In the wellness feasibility study, balance requirements, financials, risk and reward with an updated model that is not based on prepandemic history.
4. Explore “what if” scenarios using allocations from diverse funding sources already in place: bonds, REITs, private equity, grants, reimbursements, entrance fees, monthly fees, ancillary revenues.
5. Identify regulatory impacts.

Staffing model

1. Review staff recruitment procedures.
2. Review onboarding and training content for new executives, managers and staff members. Are quality of life principles and wellness part of the program?

“Throughout this process there is accountability to the board. We have to share the results, talk about what we need to do differently. If you’re going all-in and invest in, say, a vice-president of wellness and high-level professionals, it’s expensive. We’ve got to show the value of wellness by capturing data so it pencils out and validates continuing.”

Dennis Gradillas, HumanGood, presenting for Team 1

Stage 3. Preparation

Plan the steps to implement wellness as a cultural imperative.

<p>What it looks like</p>	<p>Wellness is in the strategic plan because board members and the leadership team are aligned with the wellness vision, recognizing that the potential for the organization is greater than the risk of inaction. Plans are being formed to implement wellness as a cultural imperative. The wellness vision will be implemented with short-term and long-term strategies and tactics.</p>
<p>Actions</p>	<ul style="list-style-type: none"> • Strategic plan includes wellness • Wellness implementation team installed • Wellness audit of people, place, programs • Wellness business plan • Playbook drafted

2. Include wellness in the strategic plan.
3. Conduct a wellness audit to determine a starting point: What is available, what is working well or not well? How widespread is the wellness culture?
4. Write a business plan to outline the strategies and tactics that will be used to implement the wellness initiative.
5. Identify a realistic time frame for education, alignment of beliefs and procedures.
6. Establish the organization’s wellness brand and identity.

Leadership team

1. Form the wellness committee, including all stakeholders. Establish roles, objectives and accountability.
2. Activate expertise in change management.
3. Check that leaders are committed to ongoing, long-term support of wellness culture, initiatives and programs.
4. Prepare wellness talking points so leaders can consistently and continuously express the vision.

Human-level beliefs & attitudes

1. Share the wellness vision with all stakeholders.
2. Relate the organization’s mission to the wellness vision in all communications.
3. Explain the value proposition, and how it will generate a positive resident and customer experience.
4. Integrate stakeholder views, concerns and suggested actions into the wellness business plan.
5. Write an internal and external marketing plan.
6. Update terminology to align with the wellness vision and goals.
7. Evaluate if volunteers, outsourced companies and vendors align with the wellness vision.

Consider:

- If wellness is not in the strategic plan, then it is not likely to get priority or resources.
- All executives and managers on the leadership team must be aligned with the wellness vision. Find the gaps in belief or commitment to wellness, then explain how wellness culture will benefit their areas of responsibility.

Organization-level philosophy & culture

1. Ensure the board understands the value and purpose of a wellness focus and will allocate priority and resources.

8. Identify resident and staff champions who will promote, guide and celebrate wellness philosophy.

Financial model

1. Define the financial model based on your position in the marketplace. Middle market will be different from entrance-fee life plan communities or rental apartments.
2. Reallocate resources to wellness-centric services and people across all silos.
3. Diversify revenue by monetizing added service offerings, including from outside customers.
4. Select metrics to measure results. Among the measures, establish Key Performance Indicators (KPI).
5. Think through the technology that will be required. What is in place to track results? How can technology be used to assist wellness staff?
6. Review the risk to reward ratio.

Staffing model

1. List the wellness-oriented behaviors and actions staff can use to engage with residents, family members and one another.
2. Provide the job description for potential staff members that outlines the education, experience and passion to drive wellness.
3. Prepare a wellness education, training and mentorship program.
4. Assign the individual(s) who will track wellness metrics; train the person(s) to do so and provide needed technology.
5. Align incentives with organizational and wellness goals.
6. Examine if wellness staff are hired and trained to measure outcomes.
7. Align incentives with wellness culture goals across all silos—all-in is everybody's work.

Lessons learned when building wellness into communities

As they discussed the steps taken at The Ranch and Willow Valley, Paul Johnson and Helen Foster provided insight on the development and implementation process as each organization moved through the stages of change.

Collect industry trends and best practices in a discovery phase.

What are the population trends, industry trends? Examine the resources available from organizations, such as International Council on Active Aging (ICAA), the Global Wellness Institute and the Urban Land Institute. Visit other properties and places. Conduct surveys of current and potential residents.

Write a wellness vision. Base the vision in research and the dimensions, then interpret it in your own way. Continue to review and adjust execution of the vision because wellness is a journey that is constantly opening new opportunities.

Conduct a wellness audit. Honestly assess what is available and how effectively wellness is being executed. Visit every space, take photos, observe how people are using indoor and outdoor spaces, measure attendance and satisfaction with current programs and activities. Compare the results to the information gathered in the discovery phase.

Implement wellness in small, steady steps.

Choose the wellness dimensions you can meaningfully impact. Start small and build from there. If there are 10 things on the to-do list, try three of them. Test, revise, try more, test and so on.

Develop metrics to record effectiveness.

Identify measures that show the outcomes of each initiative, selecting some to compare to your resident/client surveys. Measure year after year to continue developing the wellness program.

Design and build for all ages. When you design for the 55-plus, it is good for all ages. If you are doing the right things for accessibility, gathering spaces, shade—everybody else loves it, you're not wasting your money. Take that into account when thinking about amenities.

“Communicating why you’re changing your wellness culture and why it’s going to be beneficial requires different communication tools. The alignment of your capital partner groups is going to be different from the alignment of frontline team members. How can you coach your team to align with the wellness vision, and how do you bring along your residents to develop something much more community-focused and person-centered?”

David Haack, Tailored Advisory Services, presenting for Team 7

Stage 4. Action

Implement plans in all areas to operationalize wellness.

What it looks like	The business plan is realistic, the board and leadership team are aligned with the wellness vision. Following a wellness playbook, each department is taking action to implement wellness throughout operations, staffing, services and programs. Wellness outcomes are identified and a process is in place to track and report results.
Actions	<ul style="list-style-type: none"> • Wellness playbook • Team leaders aligned with vision • Staff champions and resident champions facilitate rollout

Consider:

- Wellness as an aspect of overall culture must be understood as everyone’s work.
- Rolling out the wellness philosophy and culture takes time.
- For staff and residents to champion wellness, they must understand how it will make their life more pleasant and jobs easier.

Organization-level philosophy & culture

1. Communicate the wellness vision in context of the organization’s mission statement.
2. Release internal and external marketing.
3. Confirm technology is ready to track and measure, and provide efficiencies.
4. Integrate wellness language into the mission statement, job descriptions, organizational and department plans and everyday vocabulary.

5. Launch a special announcement to mark a clear starting point of the change to come, and how everyone is an owner of the change.

Leadership team

1. Continually communicate why wellness culture is vital.
2. Provide examples of wellness in everyday actions and interactions.
3. Assess status and outcomes of the wellness rollout monthly. The Plan-Do-Study-Act method is a useful tool. Identify missteps, opportunities and successes.
4. View staff, residents and customers as equal partners in implementing the wellness vision.

Human-level beliefs & attitudes

1. Integrate wellness philosophy into onboarding, stand-up meetings and daily encounters.
2. Recruit residents and family members to promote and explain the wellness vision.
3. Conduct very short surveys and polls to gauge how much residents and staff members understand and believe in wellness.

Financial model

1. Monitor progress, revenue and expenses against plan.
2. Ensure staff members have technology and training to track outcomes.

Staffing model

1. Implement a train-the-trainer program to ensure leadership and momentum does not rebound to one person.
2. Fully implement internal marketing communications.
3. Hire people who share the wellness approach.
4. Invest in the human resources needed to make the wellness vision successful.

The Plan-Do-Study-Act method		
Use this method to focus your thinking and test how a change is implemented. Use it for a single change, the small step as an initiative is rolled out.		
Plan	I plan to:	Write a concise statement of what you plan to do.
	I hope this produces:	Identify the measurement or an outcome that you hope to achieve.
	Steps to execute:	List the steps needed to implement the change. Include the population that will be involved and set a time limit.
Do	Implement the change:	Watch what happens.
	My observations:	How did the people affected by the change act? How well did it fit into operations? Did it go as planned?
Study	What was learned:	Was the measurement or outcome achieved? Why or why not? Write down what worked well, what didn't and if the goal was reached.
Act	My conclusions:	If the test worked well, how the action can be spread to a wider audience or operations. If it did not work, what needs to change? Make the change, and test it with the Plan, Do, Study, Act process.
SOURCE: Agency for Healthcare Research and Quality ¹⁸		

“First and foremost, we have to recognize that wellness is a personal journey. Every person should have the freedom to pursue it in exactly their own way. We can look to wellness dimensions as a framework, but our approach should never be too intrusive or prescriptive. Rather, we set the stage for living well, with ample choice and variety, so it comes easily and naturally.”

Helen Foster, *Foster Strategy*

Stage 5. Maintenance

Sustain a stable and growing wellness culture.

<p>What it looks like</p>	<p>There is a revitalized atmosphere of purpose and positivity. Residents are healthier and happier, and new people visit and move in to the community. An ongoing, robust wellness culture circulates through all departments and service areas. The stable and growing wellness culture is monitored and updated to keep the community moving forward.</p>
<p>Actions</p>	<ul style="list-style-type: none"> • Wellness metrics collected and evaluated • Messaging is continual and renewed over time • Wellness audit repeated at intervals • Playbook updated

Consider:

- Going all-in for wellness is a circular process of development, implementation and maintenance.
- Once a set of initiatives is in place, monitor outcomes, refine, implement and maintain. Repeat the cycle.

Organization-level philosophy & culture

1. Continue to expand the wellness vision and culture through all roles and operations. Does the culture continue to support the vision?
2. Ensure the board is updated on progress and outcomes.
3. Maintain a cycle of continuous improvement by assessing the culture, retaining what is effective, making changes as needed.
4. Update the wellness plans and playbook with changes from lessons learned and continuing or new wellness initiatives.
5. Repeat the wellness audit according to the timeline.

Leadership team

1. Maintain a feedback loop with residents, staff and partners in the larger community to evaluate effectiveness of messaging and actions.
2. Analyze results and make changes as needed.
3. Model wellness behaviors.
4. Reinforce the positive results from wellness.

Human-level beliefs & attitudes

1. Refresh consistent wellness messaging with new angles.
2. Check that wellness language is updated, understood and embraced.
3. Assess barriers and strategize ways to aid individuals as they begin a wellness journey.
4. Include wellness lifestyle offerings in resident satisfaction surveys.

Financial model

1. Analyze performance metrics versus goals.
2. Analyze effectiveness of technology.
3. Accurately budget for subscriptions, software updates, maintenance and new purchases.
4. Update budgets as the wellness plan is revised and expanded.
5. Plan to reinvest in current staffing, programs and the environment.

Staffing model

1. Check that contracted recruiters hire for wellness attitudes.
2. Check that the staffing model is effective and wellness education is ongoing.
3. Ensure job descriptions and hiring will maintain the wellness vision if leadership or staff members change.
4. Discover why staff members are/are not implementing the wellness vision.
5. Commend wellness attitude and actions in recognition programs.
6. Retain wellness team members along with other stakeholders on the development team.

THE INVESTMENT

“How many millions of dollars were spent at The Ranch and at Willow Valley listening to people, not just to sell them something, but so they could feel a part of what was about to happen? It requires investment in different kinds of people, in training, in communication programs, in incentive programs to identify with the things that you hope for. It also requires us to invest in the tools that enable folks to be more accountable to what we’re going after.”

Sean Kelly, Kendal Corporation, presenting for Team 6

Move wellness from aspirational to operational

Your time and energy, strengthened by like-minded colleagues, are the critical investments needed to launch a new culture of wellness or move to the next stage of wellness.

Interpret wellness for the community. Wellness is a philosophy, a way of thinking and doing things that impacts all areas of a person’s life. While the wellness dimensions are a useful organizational framework to explain the wellness concept, it can be difficult for people who have worked from a narrower idea to reconsider the approach.

At all stages along the wellness journey, invest the time to unpack the wellness philosophy, and apply it to the organization. You do not need to use the word “wellness” if another word or phrase resonates more effectively at your organization. What does need to be retained is the concept, that all areas of a person’s life are intertwined, and therefore every option for food and beverage, social encounters, healthcare, fitness, lifelong learning, package delivery and pleasant or unpleasant interaction is wellness. The spirit is more important than the word.

Identify the influencers and decision makers. Who is on the board? What is the best way to communicate with them? Casual encounters, lunches and networking before a board meeting can be ways to

spread the updated concept of wellness to individuals on the board. Find the person who is most likely to receive the message, ask for advice on how to proceed.

An organization may have a brand or marketing message that is like the wellness concept. How can you combine the corporate message with the wellness message?

At the local level, the leadership may be pressed by tight budgets, insufficient staffing and regulations. Wellness is a long-term strategy that can balance those issues by increasing occupancy, opening new revenue streams and creating a desirable workplace. In the short-term use small efforts, measure results, and demonstrate success to engage with executives.

Think about your colleagues and residents. Who believes in and is excited about one or more areas of wellness? Brainstorm with them on how to describe wellness, how to spread it across services, how to message. These are the champions who are powerful in activating wellness.

Collect the outcomes that prove the value of wellness. With an expanded description of wellness, and its influence on all community services and operations, the door is opened to incorporate measures already being collected into the wellness framework. There is a long list of metrics collected at an earlier Forum meeting¹⁹ in the Appendix, “Metrics and KPIs explain the value of wellness.”

The people who deliver the lifestyle and fitness activities or serve meals or handle the front desk likely have a reason for what they do, and a purpose. But they may not think about these as outcomes. Past research has shown that productive activities, like joining a college course, attending a fitness class, trying low-fat cooking and socializing in a walking/photography club relate to physical and mental health and well-being. Perhaps the first step is to collect and organize productive pursuits.

The industry is shifting toward wellness

In the spring of 2022, ICAA conducted a survey of its members and associates. The 314 managers and staff members working in senior living and care believed executives give wellness a high or essential priority (79%). Almost two-thirds (61%) of the respondents stated that by 2025, the community would be based in a wellness lifestyle, with options for care.²⁰

In the new model of wellness in senior living, wellness philosophy and actions deliver the brand promise, uniting disciplines and departments to support residents, staff and customers so all achieve quality of life, while organizations meet objectives and future-proof sustainability.

Those are rewards well worth the risks. It's time to go all-in for wellness.

The Why of Wellness

Emotional

Feelings are the lens through which people view the world, and the ability to be aware of and direct one's feelings helps create balance in life.

Environmental

Surrounded by natural and man-made environments, good stewardship means respecting resources, enjoying the natural environment and active living.

Intellectual, cognitive

Engaging in creative pursuits and intellectually stimulating activities is a proven approach to keeping minds alert and interested.

Physical

The goal of living independently is one shared by many people, and physical function and health are necessary to achieve this.

Professional, vocational

Work that utilizes a person's skills while providing personal satisfaction is valuable for society as well as the individual.

Social

Social interactions with family, friends, neighbors and chosen peer groups can be valuable for maintaining health.

Spiritual

Living with meaning and purpose in life, guided by personal values, is key to feelings of well-being and connection to the larger world.

SOURCE: ICAA, <https://www.icaa.cc/business/Wellness-model-.htm>

THE DETAILS

Thought leaders



Helen Foster, Owner/Principal and Strategist, Foster Strategy, LLC

Foster Strategy, LLC, is a nationally recognized real estate development consultancy specializing in multi-generational and age-qualified communities. Helen is Chair of the Urban Land Institute’s Lifestyle Residential Development Council and Co-chair of the Global Wellness Institute’s Wellness Communities and Real Estate Initiative. For Willow Valley Communities, Helen has worked extensively in strategic planning and marketing, and is the immediate past Vice President of the Board, where she now serves as Member Emeritus.



Paul Johnson, Executive Vice President – Community Development, Rancho Mission Viejo

Paul is responsible for the design and implementation of all of Rancho Mission Viejo’s community development, overseeing all aspects of urban design, development, marketing, construction, builder land sales and the Community Services Organization. Over the next two decades, the Rancho Mission Viejo community is expected to offer 14,000 homes (including 6,000 active adult residences) and up to five million square feet of non-residential uses.



Colin Milner, CEO and Founder, International Council on Active Aging

Colin is founder of the active-aging industry in North America. Milner is a leading authority on the health and well-being of older adults, and has been recognized by the World Economic Forum as one of “the most innovative and influential minds” in the world on aging-related topics.

Resources

Foster Strategy, LLC
<https://fosterstrategy.com/>

Framing the return on investment (ROI) in wellness staff
International Council on Active Aging
<https://www.icaa.cc/conferenceandevents/forums/forumreports.htm>

Funding the new wellness model in senior living
ICAA Forum June 2022
<https://www.icaa.cc/conferenceandevents/forums/forumreports.htm>

Global Wellness Institute
Wellness Communities & Real Estate Initiative
<https://globalwellnessinstitute.org/initiatives/wellness-communities-real-estate-initiative/>

ICAA Wellness Audit
International Council on Active Aging
https://www.icaa.cc/wellness_audit/audit_promo.php

ICAA/ProMatura Wellness Benchmarks
International Council on Active Aging
<https://www.icaa.cc/business/benchmarks.htm>

Leadership in Wellness Management certificate course
International Council on Active Aging
<https://www.icaa.cc/certificate/leadership/reasons.htm>

Rancho Mission Viejo
<https://www.rancho missionviejo.com/>

The business case for wellness programs in senior living
International Council on Active Aging
https://www.icaa.cc/listing.php?type=white_papers

The Plan-Do-Study-Act method
Agency for Healthcare Research and Quality
<https://www.ahrq.gov/health-literacy/improve/precautions/tool2b.html>

Urban Land Institute
Lifestyle Residential Development Council 55+
<https://americas.uli.org/lifestyle-residential-development-council-55/>
(membership required)

Willow Valley Communities
<https://www.willowvalleycommunities.org/>

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APPENDIX

Metrics and KPIs explain the value of wellness

Key Performance Indicators <i>Relate to operational objectives</i>	Metrics <i>Outcomes meet program or department goals</i>
Occupancy	Age at move-in
	Resident and customer referrals to potential customers*
	Wellness participants satisfaction with quality of life*
	Wellness one of primary reasons for move-in*
Length of stay*	Resident satisfaction (because of wellness participation)*
	Resident self-rated health (compare wellness participants to nonparticipants)*
	Participant satisfaction
	Family satisfaction
Employee turnover (retention and reason for leaving)	Employee engagement
	Employee satisfaction
	Employee referrals to potential staff
Clinical indicators and functional outcomes	Falls resulting in injury
	Falls correlation to prevention programs
	Falls correlated to daily activities, e.g., going to dinner or travel
	Transition to higher level of care
	Hospital admission/readmission rate
	Cognitive indicators meet program goals
	Gait and mobility assessment
	Activities of daily living assessment
	Functional goals identified and progress assessed
	Fitness assessment
Program, activity or initiative performance	Participant engagement
	Participation, attendance
	Program goal and objectives met
	Before and after outcomes
	Participant satisfaction rating
* included in ICAA/ProMatura Wellness Benchmarks for Senior Living SOURCE: ICAA Forum, Funding the new wellness model in senior living	

Wellness feasibility study and business case outlines

One way to consider the scope of a change to wellness culture, and where it fits on the continuum from transformational to incremental, is to conduct a wellness feasibility study. If this pencils out, then a business plan follows. Feasibility studies and business plans share many of the same elements, but the purpose is different.

A **feasibility study** is used to determine if an initiative or project should be done. It outlines the pros and cons, examines the risks and potential rewards, details several financial scenarios.

A **business plan** explains how the initiative or project will operate. It includes, purpose, objectives, methods, people, financials and metrics that will measure outcomes.

Outline for a feasibility study	Outline of a business plan
Description of initiative or project	Executive summary
Opportunity or need	Mission and wellness vision
Target market	Wellness value proposition
Competitive analysis	Description of initiative or project
Personnel requirements	Opportunity or need
Regulatory and environmental issues	Organization and management
Marketing strategy	Services that will be offered
Benefits and risks	Key partnerships
Revenue and expense potential	Internal and external marketing
Recommendations	Benefits and risks
	Projected revenue and expense
	Action timeline

SOURCES: Feasibility Plan Framework, Deming Center for Entrepreneurship, University of Colorado Boulder.

Diane Hamilton, Difference between feasibility study and business plan.

US Small Business Administration. Write your business plan.

Example of a wellness playbook

Wellness stage or initiative				
Organization mission	If there is no stated mission, explain the purpose.			
Wellness mission	What will wellness achieve? How are you defining wellness? How will wellness deliver the mission? What will it do for residents, the business, the culture?			
Expectations	What will success look like? What is expected of everyone to realize the vision?			
Messaging	Detail talking points to describe the wellness vision and how it is being implemented across the organization. What is the elevator pitch? What is being done and why.			
Goals	What will be achieved?			
Expectations	What will success look like? What is expected of everyone to realize the vision?			
		Who	Role	Responsible for:
Team member roles	List the wellness team members, including those who are permanent and those who serve as occasional advisors. What are their roles and responsibilities?			
Leadership	Who are the decision makers? How are decisions made? Who is the team leader to contact with questions or ideas?			
Partners	Who/what are the outside educators, vendors, service providers?			
Action steps	What will be done 1 2 3 4 5	Who is responsible	Resources needed	Timeline
Outcomes	Action step outcomes 1 2 3 4 5	How measured	Results	Comment
Internal marketing	How is wellness communicated?			
Technology	What is available to assist the process and track outcome measures? Where to find the technology, how to get training.			
Resources	Tools, equipment and people that can be used. How to access and be trained on using.			
Overcome barriers	How to overcome resistance among people reluctant to embrace the wellness philosophy and actions.			
FAQs	Answers to questions and key points.			



603-1112 West Pender Street
Vancouver, BC, V6E 2S1
Toll-free: 866-335-9777
Tel: 604-734-4466
www.icaa.cc