

2000

Retirement community management : a delphi study

Heather K. Weissel
San Jose State University

Follow this and additional works at: https://scholarworks.sjsu.edu/etd_theses

Recommended Citation

Weissel, Heather K., "Retirement community management : a delphi study" (2000). *Master's Theses*. 2027.
DOI: <https://doi.org/10.31979/etd.b3n3-7a9z>
https://scholarworks.sjsu.edu/etd_theses/2027

This Thesis is brought to you for free and open access by the Master's Theses and Graduate Research at SJSU ScholarWorks. It has been accepted for inclusion in Master's Theses by an authorized administrator of SJSU ScholarWorks. For more information, please contact scholarworks@sjsu.edu.

INFORMATION TO USERS

This manuscript has been reproduced from the microfilm master. UMI films the text directly from the original or copy submitted. Thus, some thesis and dissertation copies are in typewriter face, while others may be from any type of computer printer.

The quality of this reproduction is dependent upon the quality of the copy submitted. Broken or indistinct print, colored or poor quality illustrations and photographs, print bleedthrough, substandard margins, and improper alignment can adversely affect reproduction.

In the unlikely event that the author did not send UMI a complete manuscript and there are missing pages, these will be noted. Also, if unauthorized copyright material had to be removed, a note will indicate the deletion.

Oversize materials (e.g., maps, drawings, charts) are reproduced by sectioning the original, beginning at the upper left-hand corner and continuing from left to right in equal sections with small overlaps.

Photographs included in the original manuscript have been reproduced xerographically in this copy. Higher quality 6" x 9" black and white photographic prints are available for any photographs or illustrations appearing in this copy for an additional charge. Contact UMI directly to order.

**Bell & Howell Information and Learning
300 North Zeeb Road, Ann Arbor, MI 48106-1346 USA
800-521-0600**

UMI[®]

RETIREMENT COMMUNITY MANAGEMENT: A DELPHI STUDY

A Thesis

Presented to

The Faculty of the Interdisciplinary Studies Program

San Jose State University

In Partial Fulfillment

Of the Requirements for the Degree

Master of Science

by

Heather K. Weissel

May 2000

UMI Number: 1399831

Copyright 2000 by
Weissel, Heather K.

All rights reserved.

UMI[®]

UMI Microform 1399831

Copyright 2000 by Bell & Howell Information and Learning Company.

All rights reserved. This microform edition is protected against
unauthorized copying under Title 17, United States Code.

Bell & Howell Information and Learning Company
300 North Zeeb Road
P.O. Box 1346
Ann Arbor, MI 48106-1346

© 2000

Heather K. Weissel

ALL RIGHTS RESERVED

APPROVED FOR THE INTERDISCIPLINARY
STUDIES PROGRAM

Debra David

Dr. Debra David

Nancie Fimbel

Dr. Nancie Fimbel

Kate Sullivan

Dr. Kate Sullivan

APPROVED FOR THE UNIVERSITY

William Fisher

ABSTRACT

RETIREMENT COMMUNITY MANAGEMENT: A DELPHI STUDY

By Heather K. Weissel

The purpose of this study was to design an academic program intended to prepare students for a career in Retirement Community Management. The Delphi Method of research was applied.

Nine experts in the field of Retirement Community Management served on a confidential panel charged with the task of reaching consensus while determining the most appropriate combination of course work for such a hypothetical degree program.

Panelists completed four cycles of surveys, distributed by mail, and returned by mail and by fax. First the panel identified the fundamental skills and knowledge areas required for success in this field. Each subsequent version of the survey required the panelists to select from academic courses associated with these skills.

The final result was a blended program made up of 13 courses from the disciplines of gerontology, business, and hospitality management, selected by consensus of the panel.

I wish to express my gratitude to the many people who played a part in making this degree program and this thesis happen. To my committee members, Debra, Kate, and Nancie, who gave so much of their time and valuable guidance. To my many friends and family members who offered support and encouragement during the long and challenging process of completing this project. Some gave much needed hands-on assistance, while others gave of their time by simply listening to my ideas and worries. I'm grateful to each one of you. A very special thanks goes to my parents for their constant emotional and financial support, and to my husband Ken for always being in my corner.

Table of Contents

Chapter I	
Introduction	Page 1
Statement of the Problem	Page 5
Statement of the Purpose	Page 5
Scope of the Study	Page 6
Expected Outcomes	Page 6
Limitations of the Study	Page 7
Significance of the Study	Page 7
Basic Assumptions	Page 8
Definition of Terms	Page 8
Chapter II - Related Literature	Page 11
Chapter III – Method	
The Delphi Method	Page 18
Sample	Page 18
Survey Tools	Page 21
Data Collection Procedures	Page 23
Data Analysis	Page 23

Chapter IV – Results	
Skill/Knowledge Scale Results	Page 24
Survey One Results	Page 26
Survey Two Results	Page 28
Survey Three Results	Page 30
Chapter V – Summary, Conclusions and Recommendations	
Restatement of the Problem	Page 32
Restatement of the Purpose	Page 32
Restatement of Expected Outcome	Page 32
Summary of Findings	Page 33
Conclusions	Page 36
Recommendations	Page 38
Reference List	Page 41
Appendix A	Page 44
Appendix B	Page 47
Appendix C	Page 53
Appendix D	Page 59

Chapter 1

Introduction

According to Gelfand (1993), people in America ages 65 and over made up only 2.9% of the total U.S. population in the year 1900. He further estimated that by the turn of this century, this number would increase to 13% and by 2030, fully 21% of the American public will fall into this age group (Gelfand, 1993).

With the imminent aging of the baby boomers, senior related issues have captured the attention of the American people, the media and the business world. There are numerous organizations, on-line web sites, and specialized media and commerce that cater exclusively to this growing cohort. Examples of these include: The American Association of Retired Persons (an organization for people age 50 and over), Senior Housing Net (an on-line directory of senior housing and an information and resource center), and Forever Young, A Guide To Life After Fifty (a weekly segment of the NBC morning news magazine, The Today Show). Included in the specialized services that exist for seniors in America is the growing and diverse field of senior housing.

Residential options for seniors vary dramatically, from the traditional nursing home to lavish retirement communities. A great deal has been written, in print and on-line regarding the range of services, amenities, benefits and requirements which distinguish one type of senior housing operation from the next. The range of senior housing options are identified by New Lifestyles (1999a) as: congregate living health facilities, skilled nursing facilities, intermediate care facilities, residential care facilities,

assisted living, continuing care retirement communities (CCRC), and retirement communities. These varying environments can be loosely grouped into two sub-sets of housing: one that targets seniors who are independent and one that targets seniors who require assistance in daily living, up to and including skilled nursing. Retirement communities are for individuals who are completely or mostly independent. In general, a wide range of services and amenities are available. Although nursing care is not commonly offered, many retirement communities do offer assisted living as a step-down from independent living. Continuing care retirement communities are a sub-set of retirement communities that "...usually offer a variety of independent living options for residents, coupled with full medical and nursing services" (New Lifestyles, Summer/Fall 1999a, p. 16).

The number of individuals residing in CCRCs approximately doubled between 1970 and 1988, reaching 200,000 in 1989 (Hurley, Brewer, & Brannon, 1992-93). In their study, Hurley et al. (1992-93) asserted that an increase of competition in the CCRC market will occur based in part on participation by major hospitality corporations. In his article, Rudnitsky (1999) offers the Marriott Corporation as one such example.

"Launched in 1984, Marriott's Senior Living Services runs more than 110 assisted- and independent-living communities for the elderly" (Rudnitsky, 1999, p. 8).

In a report soon to be published by the National Investment Center for the Seniors Housing and Care Industries, senior housing and care organizations are compared with the multifamily housing and lodging industries. According to 1997 national estimates, the number of lodging units in the U.S. and the number of senior housing and care units

are nearly identical (Price Waterhouse Coopers & National Investment Center, 1999). Defining a unit as a single living unit, despite numbers of bedrooms or beds, lodging units occurred at a rate of 3.535 million units in comparison to 3.446 million senior housing and care units, a difference of less than three percent. Included in the senior housing units were more than 1.1 million units in CCRCs, congregate care facilities and assisted living properties. The remaining 2.3 million units were in skilled nursing (nursing homes) and board and care properties (Price Waterhouse Coopers & National Investment Center, 1999).

When comparing the total number of properties, the senior housing and care category far out-numbers the lodging category. Lodging properties were found to have an estimated occurrence rate of 33,575 in contrast to 52,579 senior housing and care properties, of which greater than 12,000 were CCRCs, congregate care and assisted living properties (Price Waterhouse Coopers & National Investment Center, 1999).

Employment rates in each of these industries were also compared. The lodging and senior housing industries were estimated to have nearly identical rates of employment, each with approximately 1.75 million employees (Price Waterhouse Coopers & National Investment Center, 1999). Based on these statistics and the predictions of executive directors expressed in Hurley et al. (1992-93), it may be fair to suggest that future management level positions in the retirement community industry will continue to grow and also to resemble that of the lodging industry.

Even mainstream homebuilders are taking advantage of business opportunities in the active-adult market. Active-adult communities developed by the Houston-based U.S.

Home Corporation “should account for 33 percent of the company’s total revenue in 2000, up from 20 percent in 1995” (Rudnitsky, 1999, p. 2). Ara Hovnanian, president of Red Bank, New Jersey-based Hovnanian Enterprises “a market leader in the ‘active adult’ community market, which targets healthy early retirees” (Rudnitsky, 1999, p.1) estimates that active-adult communities will comprise nearly one-third of the homes built by his company in 2000, up from only 8 percent in 1996 (Rudnitsky, 1999).

With the growth and development in this arena, it may be reasonable to anticipate an increase in related job markets, drawing more professionals to the field. It is this investigator’s experience that the organizational structures of hotels and those of retirement communities actually bear a strong resemblance to one another. If similar demands are placed on managers and top executives of each type of organization, it could be argued, that in order to prepare for a career in senior housing, a person would benefit not only from a health and human service background, but from sound business and hospitality training as well.

While the regulatory requirements of operating certified nursing units demand the usual quality assurance apparatus, managers see quality management as much more consonant with the customer-service orientation of the hospitality industry. But, the backgrounds of most CCRC managers are in health care and other human services (Hurley & Brewer, 1991). Their knowledge of hospitality management has come through on-the-job experience, and they consistently identified that training in this area is critical to their job performance. (Hurley et al. 1992-93, p. 39)

Upon review of the National Directory of Educational Programs in Gerontology and Geriatrics (Lobenstine, Wendt, & Peterson, 1994), several levels of education in this field can be found. Some of the available degrees include: Associate, Bachelor, Masters, and Doctorate degrees. Minors and certificate programs can also be found. San Jose

State University is noted as offering a certificate, a minor, and a Master of Science degree in Gerontology, while doctoral level programs are available at the University of North Texas, University of Southern California, University of California at Los Angeles, and many others. Most of the gerontology programs described in the directory identify an emphasis similar to the others, and many are specifically designed to enable the graduate to pursue a position in Nursing Home Administration.

In general, the academic focus seems to ignore the entire sub-set of senior housing that caters to an active and independent senior population, and the education and training needs of those who would aspire to that arena. If individuals seeking degrees in gerontology are to be encouraged and properly prepared to pursue future employment in the field of retirement community management, then a new educational model will need to be established.

Statement of the Problem

An optimal program utilizing an interdisciplinary curriculum has not been identified for individuals with educational and career interests in the field of retirement community management (RCM).

Statement of the Purpose

The purpose of this study was to design an academic program intended to prepare students for a career in retirement community management. The Delphi Method was applied. Nine experts in the field of RCM served on a confidential panel charged with

the task of reaching consensus or near consensus while determining the most appropriate combination of course work for such a degree program.

Scope of the Study

The panel consisted of nine professionals in management level positions working in retirement communities, each with a minimum educational level equivalent to a Bachelor's degree. The criterion was intended to ensure a panel of experts with superior qualifications to contribute to a group decision process on the subject of retirement community management.

Expected Outcomes

Data reported by Fruit (1985) indicate that graduates of gerontology programs desire increased training in business. Hurley et al. (1992-93) suggests that future management level positions in the retirement community industry will likely resemble those of the greater hospitality industry, with an emphasis on discipline specific knowledge and strong business skills. The investigator hypothesized that using the Delphi Method to design a hypothetical RCM degree program would result in a truly blended program, comprised mainly of courses in gerontology, hospitality and business, where no one discipline would represent greater than 50 percent of the required units. It was further anticipated that the panel would in fact be able to reach full consensus in three survey cycles.

Limitations of the Study

There were several limitations that may have impacted the results of this study. First, the survey tools used in each succession of the Delphi Study were not standardized research instruments. Surveys were designed by the investigator exclusively for this study. Second, panelist anonymity and the providing of individual contributions are two key elements of a Delphi study (Linstone & Turoff, 1975). Panelists were instructed to complete each survey independently, yet there is no way to be certain whether they complied with these directions. It is possible that one or more of the panelists could have discussed the content of the surveys with colleagues, spouses, or co-workers, potentially impacting their responses and the final results of the surveys. Third, the fact that the process relied on human participation created minor problems for the investigator with regard to timeliness of response and compliance with instructions. On several occasions, the investigator had to call and remind panelists to return completed surveys. In the first round of the Delphi study, one of the panelists ignored the directions and selected only 11 instead of 13 courses. This variation in the total number of votes meant that as many as two courses which were discarded from the study may have been held over, or perhaps additional courses could have been selected for inclusion into the program rather than being thrown back into the mix for further consideration.

Significance of the Study

The finished product of this Delphi study is a hypothetical degree program in the field of retirement community management. While it is merely hypothetical, there may

be several generations of future gerontology students and individuals already employed in the retirement housing industry who may wish to specialize and advance in this field. Such a program, designed specifically to blend the studies of gerontology, business, and hospitality, could serve both the individual student and universities with existing or developing programs in this arena, as well as reach a market that is naturally evolving.

Basic Assumptions

For the purpose of this study, it was assumed that panelists would participate voluntarily. It was assumed that individuals invited to participate had significant and appropriate experience in the area of retirement community management. It was assumed that panelists would provide honest and timely responses and follow instructions provided by the investigator. It was also assumed that panelists would work independently and provide individual responses.

Definition of Terms

For the purpose of this study, the following definitions were used:

Assisted Living Facilities: "...a special combination of housing, personalized supportive services, and healthcare designed to respond to individuals who need help in activities of daily living, but do not need the skilled medical care of a nursing home." (Price Waterhouse, 1997, p. 33)

Board and Care Facilities: Usually licensed by the state, board and care facilities typically provide housekeeping, congregate meals, and may include some protective

oversight from staff....typically these homes do not offer a comprehensive range of services.” (Kane & Wilson, 1993, p. 2)

Congregate Care Facilities: An age restricted community for seniors requiring little, if any, assistance with activities of daily life, and where one or more basic services are provided, such as dining, housekeeping and/or transportation (Price Waterhouse, 1997).

Consensus: Defined for the purpose of this study as an opinion held by all or most, meaning no less than two-thirds of the panelists.

Continuing Care Retirement Communities: A sub-set of retirement communities that usually has three levels of care/service, including independent living, assisted living, and nursing care. Individuals are generally relocated to different parts of the property as their need for assistance changes. The CCRC may be under contract to provide care for residents through the end of their lives, though not necessarily on site (Kane & Wilson, 1993).

Delphi Method: Delphi may be characterized as a method for structuring a group communication process so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem (Linstone & Turoff, 1975).

Near Consensus: Defined for the purpose of this study as an opinion held by a simple majority, meaning greater than 50% of the panelists.

Nursing Homes: A residential option for seniors who are disabled or require ongoing care, designed, operated and heavily regulated as health facilities (Kane & Wilson, 1993).

Retirement Community: Age restricted communities that may include apartments and/or single family dwellings, for rent or for purchase, with complete community planning and

a wide range of services and amenities. “One of the more recent phenomena developing as a result of the large number of people who are retiring, particularly with good retirement incomes” (Gelfand, 1993, p. 187).

Senior Population: That part of the general population that is at least 65 years old.

Chapter 2

RELATED LITERATURE

According to Hurley et al. (1992-93), the idea of blending business and hospitality concepts and practices into gerontology curriculum makes good sense, especially in regard to the management of senior housing. Their study involved interviews with twenty-six CCRC executive directors regarding the future of their individual communities and the industry as a whole. They described the CCRC as a more consumer-driven enterprise in comparison to most other categories of senior housing. They cited the elegant physical appearance of the communities and the roving troubleshooter role of the executive director as evidence of the similarities between CCRCs and the hotel industry. O'Connor and Bowers (as cited in Hurley et al., 1992-93) note that "CCRCs have a decidedly strong 'quality of life' rather than a medicalized 'quality of care' ethos. In other words, hospitality is the principal service being rendered" (Hurley et al., 1992-93, p. 39). Most of the managers interviewed identified a need to enhance a very shallow management structure that generally includes executive level staff in three primary positions: general manager, director of nursing and director of finance. Survey subjects advocated for the addition of management level positions in the areas of finance, marketing and personnel management in order to meet the unique marketing challenges of this industry (Hurley et al., 1992-93).

Much of the educational curriculum currently offered in the United States does not meet the growing needs of the retirement community industry. However, gerontology programs offering a multidisciplinary curriculum can be found at a handful

of American universities and include all levels of degrees from associate to doctoral. Three examples of multidisciplinary programs are the University of North Texas, Miami University and San Jose State University.

The Department of Applied Gerontology at the University of North Texas (UNT) offers both a Masters degree program and a specialist certificate at the graduate level. Formerly the Center for Studies in Aging, the Department was established in 1967 through a grant from the U.S. Administration on Aging. Faculty in the department are involved in research in a variety of areas, including "...a wide array of innovative models for organizing, delivering and financing residential and community-based services for the elderly" (UNT web page, 1999, p. 11).

Within the Master's degree program at UNT, there are three majors to choose from: administration of long-term care and retirement facilities, administration of aging organizations, and applied gerontology. The major in administration of long-term care and retirement facilities (ADLR) prepares students for careers as administrators of CCRCs, retirement housing properties, assisted living facilities, skilled nursing centers, and home health agencies. The prerequisites to this major include one three-unit course in social gerontology and six units of undergraduate accounting.

The degree is comprised of forty-five units including nine core units in the areas of Health and Aging, Psychology of Aging, and Government Programs in Aging. Fifteen units of concentration courses are taken in Computer Applications in Long-Term Care, Health Delivery Systems, Housing for the Elderly, and Administration of Long-Term Care and Retirement Facilities. A minor in business is required and is comprised of

fifteen units in the areas of accounting, business law, finance and management. An internship worth three to six units is required and three units of a seminar are taken in Applications in Practice, in lieu of a thesis (UNT web page, 1999).

Miami University offers a MGS degree (Management of Gerontological Studies) with two areas of concentration to choose from, Administration in Aging or Research in Aging. "The Administration in Aging concentration is designed to provide students with a background in gerontology, public policy and management in preparation for administrative positions in the field of aging" (MU web page, 1999, p.5). A total of thirty-eight semester units are required for completion of the degree. In the Administration in Aging concentration, thirty-two to thirty-four core units are taken in the subjects of gerontology, physical education, accountancy (business administration), political science, and management (business administration). Three core units are taken in a gerontology foundation course and between six and eight units come from a graduate practicum (internship) in gerontology. The final four to six units are elective units chosen from courses offered in gerontology, sociology, anthropology, accountancy, management, physical education, political science and a Biology of Aging course offered by the Zoology Department. Prior to the award of the MGS degree, all students are required to pass a comprehensive written exam, taken during the final semester (MU web page).

At San Jose State University, students can earn a Master of Science degree in Gerontology, or they may seek a minor or a certificate. Prerequisites for classified standing in the MS major include four courses in gerontology and one in statistics. A

total of thirty units comprise the degree program, including twelve units of core courses, nine in gerontology and three in health professions, and between twelve and fifteen elective units. At least one elective course must be taken in gerontology with the remaining courses chosen from a list including; gerontology, business, health professions, health science, human performance, public relations, public administration, recreation and leisure studies, women's studies, social work, sociology, and urban planning. The final three to six units are earned either by completing a special project or a thesis (San Jose State University Catalog, 1998-2000).

At Arizona State University a gerontology certificate is available. The program includes a course in aging policy that is of particular interest because its approach and focus are multidisciplinary. Originally taught by social work instructors, the policy course has been altered to a team-taught format with faculty from the School of Social Work and the College of Business. The course examines the social, political, and economic issues faced by older persons and has an elaborate syllabus with nine distinct course objectives. To address each objective, the course is taught in six separate units.

During the first unit, instructors discuss the evolution of a network of senior services and decisions regarding allocation of resources. "The intent is to provide a point-counterpoint approach to quality of life care questions versus the economic realities of scarce resources.... The goal is to help all students understand the depth and scope of need, and the importance of combined efforts" (Netting & Williams, 1989, p. 5).

In a subsequent unit, the business instructor covers topics including economic concepts, social security, and cost-benefit analysis. The following two units cover health

and housing issues of the aged. Federal public policy, third-party reimbursement, and Medicare are a few of the subjects discussed. In contrast to the economic perspective of the previous unit, these units focus more on implementation of policy.

Combining expertise is not only a validation of the interdisciplinary approach, but provides a working demonstration of how to address critical issues and work on joint problem solving. Thus students in business and social work discover alternative approaches to analyzing the issues. (Netting & Williams, 1989, p. 10)

In their investigation, Doka and Smith-Fraser (1989) predicted that in the 1990s, gerontology programs and private industry each would pay greater attention to the business implications of gerontology. They suggested that while greater numbers of people would seek formal education in the field of gerontology, federal deficits would restrict the growth of programs and services in the public sector. Private industry, already aware of the unique marketing opportunities related to the aging population, would therefore take notice of and begin to make greater contributions to the field of gerontology. They further suggested that academic gerontology and the private sector would each stand to gain from the development of joint ventures. Their paper presents both opportunities and barriers to such an alliance. Suggestions for joint programs include research projects, corporate training programs, pre-retirement programs, and hiring academics as corporate consultants to make presentations on various topics.

One of the greatest barriers to growth in this direction is the relatively unestablished identity of gerontology programs. This could make it difficult to compete with private consultants from more familiar disciplines. "Academics frequently have to

make the corporate world aware of their areas of expertise and the ways that expertise could contribute to organizational tasks.” (Doka & Smith-Fraser, 1989, p. 84)

A second possible barrier to creating business links to gerontology is attitude. Seeking a role in private, possibly even for-profit projects, may be viewed by some in the field as less altruistic than traditional public sector roles, causing hesitation or resistance to new partnerships (Doka & Smith-Fraser, 1989).

In addition to a lack of mainstream recognition and philosophical variances, curricular barriers to this type of professional development may also exist for the field of gerontology.

Studies of gerontological graduates have stressed the desirability of integrating administrative and business management courses within the gerontological curriculum (Fruit, 1985; Krause, 1987; Peterson, 1985a, 1985b, 1987). Yet Peterson, (1984) indicates gerontology curricula show that such topics are under-represented. (Doka & Smith-Fraser, 1989, p. 85)

Doka and Smith-Fraser suggested that academic programs in gerontology should explore opportunities for offering cross-listed and interdisciplinary courses with business departments, “or other departments that offer administrative expertise.... Integration goes beyond the addition of a few business courses” (Doka & Smith-Fraser, 1989, p.85).

There is no question that the need for senior services, programs, and housing will continue to grow as the population experiences the aging phenomenon anticipated for the coming decades. The changing dynamics of our population coupled with the changes in health care and the funding of public programs will require professionals in senior service arenas to possess skills and knowledge from various disciplines. The fields of

gerontology, business and hospitality may represent the best possible combination of expertise for providing such training and education.

Chapter 3

METHOD

The Delphi Method

Delphi is a process that enables a group of individuals to communicate on a specific issue or question in the interest of reaching a group decision. It has been used significantly as a method of forecasting, and examples of additional applications include: exploring options for urban planning, determining the pros and cons of policies under consideration, and planning university curriculum (Linstone & Turoff, 1975).

To accomplish this “structured communication” there is provided: some feedback of individual contributions of information and knowledge; some assessment of the group judgement or view; some opportunity for individuals to revise views; and some degree of anonymity for the individual responses. (Linstone & Turoff, 1975, p. 3)

The investigator elected to utilize the Delphi method because of its structured nature as well as for practical reasons. A series of round table discussions or a one-day retreat (allowing panelists to interact in person) might have offered an interesting dynamic to the process and resulted in different outcomes. However, the investigator wanted to include representatives from various regions around the state of California. Cost and time considerations made these types of group meetings impractical and the Delphi method quite accessible.

Sample

Individuals invited to participate in the study were identified through the process described below. Senior residence directories for the state of California were obtained

from New Lifestyles, a Texas publishing company. All five of the California directories available from this source were utilized for the study. These five directories encompassed the geographical regions of: the San Francisco Bay Area, San Diego, Sacramento and the North Bay, Orange County and the Inland Empire, and Los Angeles and Ventura Counties.

Retirement communities were selected from the directories based on three criteria. First, they were located under the heading of Retirement. Second, each community was noted as offering both assisted living (AL) as well as either independent living (IND) or apartment living (APT). Third, the narrative description (either alone or in conjunction with a printed ad) indicated that dining/meal services and activities programming were provided, as well as two or more of the following amenities; transportation, housekeeping/laundry, swimming pool, golf course, fitness center, library, tennis court, concierge, beauty/barber shop and maintenance. The investigator believed that communities with such qualities represented the types of senior housing properties in which a person with a degree in RCM would find employment. The demands placed on managers of such communities with multiple levels of service provision and an amenity-rich environment were at the core of the question being addressed in this study. Of the 233 listings in the Retirement section of the directories, 39 met all three criteria.

Each of the identified communities was contacted by phone. The names of the executive directors and assistant executive directors were procured, which totaled 58. Each of the 58 individuals was sent a cover letter and an initial survey requesting demographic information and opinions on the subject of retirement community

management (see Appendix A). Twenty-one responses were received, of which only 13 individuals met the educational criteria of possessing at least a Bachelor's degree. Each of the 13 was provided with the first of three surveys (see Appendix B), of which 9 were returned. These six women and three men represent the final group of panelists, whose demographics and credentials can be found in Table 1.

Table 1
Panelist Demographics

No.	Sex	Age	Education	Title	Years in Senior	People	Units
					Housing	Supervised	On-site
1	M	66	B.S.	General Manager/ Administrator	12	89	212
2	F	50	B.A./M.S.	Executive Director	4	37	117
3	F	45	B.A. M.B.A.	General Manager	6	300	408
4	M	36	B.B.A./J.D.	Administrator	8	40	160
5	F	37	B.A.	Assistant Administrator	8	40	118
6	M	38	B.A.	Long-Term Care	15	12	202

				Administrator			
7	F	41	B.S./M.S.W.	Vice President	16	11	198
				Of Operations			
8	F	N/A	B.A.	Executive	11.5	90	210
				Director			
9	F	37	B.A.	Executive	9	8	187
				Director			

Survey Tools

Along with demographic information, the initial survey asked for the panelists' opinions on the requisite skills and knowledge areas for success in the field of RCM. Using a numeric scale provided by the investigator, panelists scored 28 separate skills/knowledge areas (Appendix A), suggested by the investigator. The list of skills/knowledge areas was created by the investigator with input from SJSU representatives from each of the three disciplines under consideration (gerontology, business, and hospitality management). Panelists were instructed to rate each of the 28 items using a scale from one to four. Definitions of each numeric value were provided as follows: 1 = necessary in order to meet and exceed the general job responsibilities; 2 = helpful for meeting the general job responsibilities; 3 = rarely/periodically applicable to the general job responsibilities, and 4 = never applicable to the general job responsibilities. To allow for brainstorming (a distinct element of the Delphi method),

panelists were also given the opportunity to add their own suggestions to the list of skills/knowledge areas. Each subject receiving an average score of two or less as well as any new subject suggested by at least two panelists became a candidate for consideration in the Delphi process. Results of the initial survey can be found in Table 2.

Based on these results, academic courses were identified for each of the selected subject areas. The investigator used the catalogues of San Jose State University, University of North Texas, and Miami University to locate these courses. These universities were selected by the investigator after a review of the National Directory of Educational Programs in Gerontology and Geriatrics (Lobenstine et al., 1994) revealed them to represent curriculum that ranged from typical to exceptional in the area of gerontology.

The first survey of the Delphi process (Appendix B) included 23 courses, encompassing 20 different subjects. Of the 23 courses, eight came from San Jose State University, six from Miami University and nine from the University of North Texas. Panelists were instructed to review the course listings and identify the 13 they judged to be most important in preparation for a career in RCM. The investigator elected to use 13 courses as the basis for the final hypothetical degree program, as it represented an average number of courses required by the gerontology programs of the above noted universities.

Surveys two and three (Appendix C and Appendix D, respectively) were designed based on the outcome of the preceding surveys, by applying the following criterion: courses with at least one-third support (at least three votes) were held over for further

consideration, those with less than one-third support were eliminated, and courses with six or more votes (consensus) were accepted into the hypothetical program.

Data Collection Procedures

Surveys were distributed to panelists by mail and included self-addressed and stamped envelopes for mailing responses. Panelists returned surveys to the investigator by mail and by fax. In addition to the initial survey/request for participation, three more surveys were distributed, spanning a period of approximately 14 weeks. In each survey cycle, the investigator collected the panelists' responses and tallied their votes. Each subsequent survey instructed panelists to choose again, making available only those courses that met the one-third and two-thirds criteria previously described.

Data Analysis

In each of the three survey cycles, all nine panelists returned completed surveys. However, in the first survey, one of the panelists selected only 11 courses, rather than the specified 13. Even so, the investigator calculated the votes for courses one through 23, and applied the one-third support and two-thirds support criteria to determine the status of each class. Any course receiving at least three votes, or 30% support from the panel was held over for consideration in the second cycle of the survey. Courses with 6 votes or more were identified as chosen for inclusion. All others were dropped from the study. In each subsequent survey cycle, the same procedure was followed.

Chapter 4

RESULTS

This chapter provides specific descriptions of each cycle of the Delphi study. It also includes tables that illustrate the results corresponding to each of the surveys completed by the expert panelists.

Skill/Knowledge Scale Results

Of the original 28 skills/knowledge areas, rated by panelists on a scale from one to four, 17 subjects received an average score of two or less. There were also three new topics that were suggested by two or more of the panelists. Two panelists voted for the suggested subject area of budgeting/financial forecasting. The subject of government regulatory issues was suggested by three people, and problem solving/decision making was suggested by four. Many other individual suggestions were made within the group, including but not limited to: public speaking, death & dying, the health care industry, and mechanical systems knowledge. Several additional ideas were generated, most of which related more to personal attributes than learned knowledge. Examples included: flexibility, the ability to handle stress, positive reinforcement skills, compassion, ability to relate to seniors, and being innovative.

These 20 skills/knowledge areas deemed by the panel to be important when considering the demands of working as a retirement community manager represent a wide range of subjects from a variety of disciplines. A total of 23 courses were identified

which the investigator determined to adequately represent each of the 20 subject areas.

Table 2 illustrates the outcome of this exercise.

Table 2

Average Scores of Skills/Knowledge Areas (N = 13)

<u>Skill/Knowledge Area</u>	<u>Average Score</u>
Accounting	1.4
Computer Skills	1.6
Counseling for Seniors and Their Families	1.8
Customer Service	1.2
Employment Laws	1.6
Ethics	1.6
Finance	1.8
Food and Beverage Management	1.8
Front Desk/Concierge Operations	2.0
Government/Social Welfare Programs	2.2
Grant Writing	3.2
Human Resource Management	1.4
Leadership	1.2
Lodging Operations	2.2
Long Term Care	1.8
Marketing	1.2

Multiculturalism	2.3
Nutrition	2.1
Program Planning for Seniors	2.1
Psychology of Aging	1.8
Public Relations	1.7
Real Estate Law	3.1
Recreation and Leisure Programming	2.2
Research Techniques	3.3
Retirement/Estate Planning	3.0
Senior Health and Wellness Issues	1.8
Senior Housing	1.8
Statistics	2.7

Survey One Results

The first survey asked the participants to consider each of the 23 course descriptions (see Appendix B) and to identify the 13 courses they believed would best combine to prepare an individual for a career in retirement community management. A total of thirteen surveys were distributed and nine were returned. These nine represent the group of panelists charged with reaching consensus on the proper 13 courses to include in a hypothetical degree program in RCM. Table 3 illustrates the results of the first survey cycle.

Table 3**Total Votes Each Course Received In Survey #1 (N=9)**

<u>Course Number and Name</u>	<u>Total Votes</u>
1. Accounting and Management Decision Making	9
2. Aging Programs and Services	5
3. Aspects of Long-Term Care; Health	4
4. Aspects of Long-Term Care; Social	7
5. Consumer and Market Behavior	2
6. Financial Management	8
7. Fundamentals of Finance	1
8. Health Aspects of Human Aging	5
9. Hotel Front Office Management	1
10. Housing for the elderly; Planning, Public Policy & Research	2
11. Human Resource Foundations	8
12. Introduction to Computers in Business	3
13. Law, Labor and Employee Relations	8
14. Leadership	6
15. Management Skills and Problem solving	9
16. Marketing Management	8
17. Principles of Food and Beverage Operations	7
18. Principles of Public Relations	4
19. Professional/Business Ethics	3

20. Psychological Counseling for Late Maturity and Old Age	3
21. Psychology of Aging	7
22. Service Operations Management	4
23. Visual Display of Business Information	1

Courses receiving support from at least one-third of the panel (those with at least three votes) were held over for further consideration in the second survey cycle. Courses with fewer than three votes were eliminated from the survey process. Based on the definition of consensus equaling no less than two-thirds support, courses with at least six votes were selected for inclusion into the hypothetical RCM degree program. The panel identified ten of the ultimate 13 courses to be included during the first survey cycle. Several of the courses selected were chosen by eight out of nine panelists, and two subjects, accounting and problem solving, were selected unanimously.

Survey Two Results

In the second cycle of the Delphi process, panelists were asked to choose from the eight courses that had received three, four, or five votes in the first cycle. Panelists were provided with a list of the ten courses already selected for inclusion (see Appendix C) in order that their subsequent choices would be made with this beginning curricular structure in mind. The results of the second survey can be found in Table 4.

Table 4**Total Votes Each Course Received in Survey #2 (N = 9)**

<u>Course Number and Name</u>	<u>Total Votes</u>
2. Aging programs and Services	2
3. Aspects of Long Term Care; Health	2
8. Health Aspects of Human Aging	6
12. Introduction to Computers in Business	1
18. Principles of Public Relations	4
19. Professional/Business Ethics	5
20. Psychological Counseling for Late Maturity & Old Age	2
22. Service Operations Management	5

With six votes, the panel elected to include one additional course, in the area of health and aging. Of the remaining seven, four were eliminated, having only received one or two votes. These four included courses in aging programs and services, health aspects of long-term care, business computers, and counseling for late maturity and old age. The final three were, once again, recycled for further consideration in the last of the Delphi surveys. These were courses in public relations, ethics, and service operations management.

Survey Three Results

The third and final survey included a set of instructions, a list of courses already selected by consensus, and the three remaining courses from which the panelists would make their final two selections (see Appendix D). In this last cycle of the Delphi study, a total of 18 votes were cast. With only three courses to choose from, it was possible that each could have received the six votes necessary for inclusion in the hypothetical program. Table 5 illustrates the results of the final survey.

Table 5

Total Votes Each Course Received in Survey #3 (N =9)

<u>Course Number and Name</u>	<u>Total Votes</u>
18. Principles of Public Relations	5
19. Professional/Business Ethics	7
22. Service Operations Management	6

By a narrow margin, the final two courses were selected, leaving a course in public relations completely out of the hypothetical degree program. Table 6 illustrates the final selection of courses in totality.

Table 6**Final Selection of Courses and Home Discipline of Each Course**

Course # and Title	Discipline
1. Accounting and Management Decision Making	Business
4. Aspects of Long-Term Care: Social	Gerontology
6. Financial Management	Business
8. Health Aspects of Human Aging	Gerontology
11. Human Resource Foundations	Business
13. Law, Labor, and Employee Relations	Business
14. Leadership	Business
15. Management Skills and Problem Solving	Business
16. Marketing Management	Business
17. Principles of Food and Beverage Management	Hospitality
19. Professional/Business Ethics	Business
21. Psychology of Aging	Gerontology
22. Service Operations Management	Hospitality

Chapter 5

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Restatement of the Problem

An optimal program combining interdisciplinary curriculum has not yet been identified for individuals with educational and career interests in the field of retirement community management (RCM).

Restatement of the Purpose

The purpose of this study was to design an academic program intended to prepare students for a career in retirement community management. The Delphi Method was applied. Nine experts in the field of RCM served on a confidential panel charged with the task of reaching consensus or near consensus while determining the most appropriate combination of course work for such a degree program.

Restatement of Expected Outcome

It was expected that using the Delphi Method to design a hypothetical RCM degree program would result in a truly blended program, comprised mainly of courses in gerontology, hospitality and business, where no one discipline would represent greater than 50 percent of the required units. It was further anticipated that the panel would in fact be able to reach full consensus in exactly three survey cycles.

Summary of Findings

This study involved several steps, each one a prerequisite to the step that would follow. First, a search was completed in order to identify potential expert panelists. Next, each potential panelist was contacted in writing to request participation in the study and elicit expert opinions as to the necessary subject areas to be included for consideration in the three cycles of the Delphi study. Potential panelists were asked to review and rate a list of skills and knowledge areas to determine each one's value in the field of study being considered. Panelists were also given the opportunity to suggest additional topics that were not noted on the survey. Once the core subjects were identified, a set of courses was established, making certain that each subject area identified as important by the experts was represented by at least one university course. The panelists then received the list of courses and a set of instructions for making their selections. By applying a set of established criteria, the outcome of the first survey dictated the content of the subsequent survey. A second survey with course descriptions and instructions was distributed and once again the results determined the course of the third survey, the final survey to be distributed.

The goal of bringing together experts in the field and facilitating a mock round-table discussion between them was completed, with consensus on the subject, in three survey cycles. The panel began by identifying a wide range of skills/knowledge areas as helpful or necessary for success in the field of retirement community management. In addition to various senior service topics which one might expect (health, housing, counseling, etc.), there were several mainstream business topics as well as hospitality

topics which earned high marks, including: accounting, customer service, leadership, ethics, finance, public relations, front desk operations and food and beverage management. Access to courses such as these may exist in some gerontology programs. However, after reviewing the National Directory of Educational Programs in Gerontology and Geriatrics (Lobenstine et al., 1994) and the catalogues of the three universities included in this study, it seems such pursuits would require a fair amount of manipulation of current programs. Thus, if it can be determined that a market exists for an established curriculum combining course work from these three departments, the outcome of this study may prove useful in doing so.

Using the catalogues from San Jose State University, Miami University and the University of North Texas, a total of 23 courses were identified by the investigator. Courses came primarily from the fields of gerontology, business, and hospitality. One course came from the Public Relations program at SJSU, and of the 22 other course offerings, 12 were generated from the field of business, seven from gerontology and three from hospitality. Fourteen of the courses were at the graduate level and nine were upper division undergraduate courses.

The first survey cycle involved all 23 courses and panelists were instructed to select the 13 that would best combine to prepare a person for a career in retirement community management. In order for an individual course to be chosen for the hypothetical degree program, it would have to be selected by consensus, receiving support from at least two-thirds of the panel. The panel of nine made a clear initial decision by selecting 10 of the 13 courses in the first survey cycle. Two courses, number

one and number 15 (see Appendix B) received unanimous support. These two business courses addressing accounting and problem solving and decision making were the only ones to be affirmed by all nine panelists in the first cycle. Of the other eight courses selected for inclusion, four business courses were selected with eight out of nine votes each, two gerontology and one hospitality course were selected with seven votes each, and still another business course was chosen with a total of six votes. The first ten courses to be selected represent a wide range of subjects. While the course offerings were not equally representative of the three disciplines discussed earlier in this paper (gerontology, business, and hospitality management), it is interesting to note that each of these three areas of study are represented in the first ten courses selected for inclusion. The courses that were eliminated due to receiving less than one-third support of the panel addressed the subjects of customer service, finance, front office management, senior housing, and computers and business. The remaining courses were held over for further consideration in the second cycle of the Delphi study.

Of the eight remaining courses still being considered by the panel, four were from gerontology, two from business, and one each from hospitality and public relations. Panelists were provided with the results of the first survey (a list of courses already selected by the panel) and instructed to repeat the process of selecting courses, this time three, to establish a final set of thirteen. At the conclusion of the second survey, only one more course had been chosen by consensus to be included in the final hypothetical program. With six votes, an additional gerontology course, addressing health and human aging, was added to the original ten. Half of the courses that were originally supported

by three or more panelists were excluded from the study in the second survey cycle. Courses in health and long-term care, public programs for seniors, counseling for seniors, and computers in business, were dropped. The remaining three courses would be the focus of the third and final survey cycle.

Distributed with the third survey (see Appendix D) was an updated list of courses chosen for inclusion in the hypothetical program and instructions to select two out of the remaining three to round out the overall program. While mathematically, all three courses could have received the requisite six votes to be selected for inclusion, this did not come to fruition. With a narrow margin, courses in ethics and service operations management were chosen to complete the hypothetical program. The public relations course, which made it all the way through the process and received five out of nine votes in the final survey, was finally eliminated.

Conclusions

In the end, the hypothetical degree program designed by the panel of experts was comprised of thirteen courses, identified via three survey cycles, with each course supported by two-thirds or more of the panel and therefore selected by consensus. The ability of the panel to reach consensus in just three survey cycles was one of the anticipated outcomes of this study.

With the elimination of the single public relations course, the academic program ended up as a mix of gerontology, business, and hospitality management curriculum. A

resulting program comprised primarily of course work in these three fields was also identified as an expected outcome of this study.

However, it was further anticipated by the investigator that the final blend of course work would result in no single discipline representing more than six of the final 13 courses. The actual results did not, in fact, support this expectation. In the final analysis, the hypothetical degree program was made up of eight business courses, three gerontology courses and two hospitality courses.

It is difficult to distinguish any particular voting patterns among the panel. When considering the panel in its various sub-groups (age, gender, number of years in profession, level of education, etc.) it becomes clear that the group was very much aligned in their opinions, right from the start, regardless of demographics.

By endorsing 10 courses during the first survey cycle, the panel made a clear statement as to the most fundamental skill set necessary for success in their field. While only two-thirds support was required for inclusion, six out of the first 10 courses chosen were done so with 88% - 100% support of the panel.

In addition to their common opinions early in the process, it is interesting to note that in neither the second nor third survey cycles did any individual panelist stand alone in his or her voting pattern.

In essence, this panel made a fast and firm decision as to the foundation of this hypothetical program. In the second survey, they struggled to agree on which of the remaining courses would best supplement those already selected, but did not hesitate to determine which courses could be sacrificed. Finally, in the third survey, the group's

response suggested that while valuable, incorporating additional disciplines was not a priority for such a program. Clearly, individual panelists were concerned not only with the selection of specific courses, but with the overall combination of courses as well.

While unexpected, it is not so surprising that the need for solid business knowledge was such a priority with this panel. As the investigator initially asserted, retirement communities are similar in many ways to the lodging and food service industry. Individuals with academic experience geared mainly towards the administration of retirement or nursing homes will be ill prepared to take on the dynamic roles of leadership in such communities.

Recommendations

Further study of a blended academic program with input from these three fields could lead to the development of a program with value to students, universities, and to a booming industry. Future studies in this field could also focus on the appeal of such a program to undergraduate students and professionals in related fields who are considering pursuit of an advanced degree. This would be one way of determining if a market for such a program exists. During such a process, serious consideration should be given to ways in which business concepts and gerontological issues can be joined in a curriculum.

A variation of this Delphi study could be conducted and involve larger numbers of participants, representing a larger numbers of communities. The process would certainly benefit from panelist interaction and debate. A one-day focus group might be a more effective alternative for gathering data and enabling participants to respond to each

other and to engage in dialogue. This would allow investigators to better appreciate the panelists' reasons for voting in a particular fashion.

Even academic institutions are getting into the business of retirement living. The University of Virginia and the University of Michigan were featured in the Forever Young segment of the Today show in the Spring of 1999, each one with retirement communities on their property with residents blending into campus life. A study incorporating school administrators, faculty, and students, and retirement community administrators and residents (from these locations) could result in cutting edge data and the design of an outstanding program.

These and other ideas for future research in this burgeoning industry need to be promoted by university departments within the fields of gerontology, business, and hospitality. Students seeking guidance for research topics and graduate projects should be encouraged to try one of the above suggestions or related ideas. Reading and analyzing this thesis will, hopefully, encourage others to pursue a study of their own, and therefore, help to advance the idea of expanding options for multidisciplinary curriculum. Findings from this study, and from others prompted by it, might lead to the development of an actual degree program in RCM.

This one study can only impact those who were involved, their related associates (i.e. residents and staff at the various retirement communities represented in the study), and those who happen to read it. The individual panelists, each practicing professionals in the industry, were asked to examine the foundations of their roles and may in fact have responded by altering behaviors or emphasizing particular skills while performing their

jobs. Supervised staff members and residents receiving services might therefore reap the rewards of their administrator's participation in this study.

References

- Doka, K.J., & Smith-Fraser (1989). Building coalitions with private industry: Academic gerontology in the corporate world. Gerontology & Geriatrics Education, 10 (1), 81-90.
- Fruit, D. (1985). Are graduates of Bachelor's degree programs in gerontology employed? A report of a national survey. Educational Gerontology, 11, 237-245.
- Gelfand, D.E. (1993). The aging network: Programs and services (4th ed.). New York: Springer Publishing Company.
- Hurley, R.E., Brewer, K.P., & Brannon, D. (1992-93). Competition comes to the CCRC: Perspectives of community managers. The Journal of Long-Term Care Administration, Winter, 37-40.
- Kane, R.A., & Wilson, K.B. (1993). Assisted living in the United States: A new paradigm for residential care for frail older persons? Washington, DC: American Association of Retired Persons, Public Policy Institute.
- Linstone, H.A., & Turoff, M. (1975). The Delphi Method. Reading, MA: Addison-Wesley Publishing Company.
- Lobenstine, J., Wendt, P., & Peterson, D. (1994). National directory of educational programs in gerontology and geriatrics (6th ed.). Washington, DC: Association for Gerontology in Higher Education.
- Miami University Web Site. An overview of the MGS degree [On-line], 1999. Available: <http://www.muohio.edu/~scrcwis/deg-o-v.htmlx>

Netting F.E., & Williams, F.G. (1989). A team-taught aging policy course. Gerontology & Geriatrics Education. 10 (1), 1-11.

New lifestyles an area guide to senior residences and care options for Los Angeles/Ventura counties (Summer/Fall 1999a). Dallas, Texas: Corporate Communicator.

New lifestyles an area guide to senior residences and care options for Orange county/inland empire (Summer/Fall 1999b). Dallas, Texas: Corporate Communicator.

New lifestyles an area guide to senior residences and care options for Sacramento/north bay (Winter/Spring 1999c). Dallas, Texas: Corporate Communicator.

New lifestyles an area guide to senior residences and care options for San Diego (Winter/Spring 1999d). Dallas, Texas: Corporate Communicator.

New lifestyles an area guide to senior residences and care options for San Francisco bay (Summer/Fall 1999e). Dallas, Texas: Corporate Communicator.

Price Waterhouse (1997). The investment case for senior living and long term care properties in an institutional real estate portfolio (Rep. No. 3206). Annapolis, MD: National Investment Conference for the Senior Living and Long Term Care Industries.

Price Waterhouse Coopers & National Investment Center for the Seniors Housing & Care Industries (1999). Size, scope, and performance of the seniors housing and care industry: A comparison with the multifamily and lodging sectors (Rep. No. 3216). Annapolis, MD: National Investment Center for the Senior Housing & Care Industries.

Rudnitsky, H. (1999, February). When demography is destination. Institutional Investor, [On-line serial]. Available: <http://proquest.umi.com./pdqweb?TS=9257553>

...=1&Fmt=3&Sid=3&Idx=2&Deli=1&RQT=309&Dtp=1

San Jose State University. 1998-2000 Catalog San Jose: Author.

University of North Texas Web Site. Graduate studies in applied gerontology

[On-line], 1999. Available: <http://www.unt.edu/pais/grd/ager.htm>

Appendix A

(Original letter was printed on Gerontology Department letterhead).

Dear Potential Expert Panelist,

My name is Heather Weissel and I am a graduate student at San Jose State University. Based on your position in the retirement community industry, you have been identified as an expert in this field. I am conducting a study on the subject of retirement community management, in order to complete my Master's degree, and would like to request your participation.

I will be employing the Delphi Method of research, which is a process based on reaching group consensus. If you agree to participate, you will be asked to complete a series of four surveys. The goal of this study is to identify a set of college courses that would most effectively prepare an individual for a career in retirement community management. Over the next three months, surveys will be distributed by mail and will take approximately 15 to 30 minutes to complete. The results of this study will be presented to a committee of San Jose State University professors in the Gerontology, Business and Hospitality programs, and may help in the future development of a new academic program at San Jose State University. I have enclosed the first of the four surveys. Will you please take 15 minutes to complete the survey and return it to me in the enclosed self-addressed stamped envelope?

You should understand that your participation is voluntary and that choosing not to participate in this study, or in any part of this study, will not affect your relations with San Jose State University.

I do not anticipate that your participation in this study will bring any risks or benefits to you. It will however, help to clarify the best academic course for future professionals in this industry.

The results of this study may be published, but any information that could result in your identification will remain confidential.

If you have questions about this study, I will be happy to talk with you. I can be reached at (650) 940-1545. If you have questions or complaints about research subjects' rights, or in the event of a research related injury, please contact Nabil Ibrahim, Ph.D., Acting Associate Vice President for Graduate Studies and Research, at (408) 924-2480.

Sincerely,

Heather Weissel
SJSU Graduate Student
Interdisciplinary Studies

The ultimate goal of this Delphi study is to identify a set of 13 college courses (approximately 39 semester units) that would most effectively prepare an individual for a career in retirement community management. The first step in this process will be to identify those skills that are most fundamental to success in this field.

Using the following numeric values, please rate each of the skills/knowledge areas listed below as to their significance in retirement community management. Please review the entire list before assigning any values.

- 1 = *necessary* in order to meet and exceed the general job responsibilities
- 2 = *helpful* for meeting the general job responsibilities
- 3 = *rarely/periodically* applicable to the general job responsibilities
- 4 = *never* applicable to the general job responsibilities

<u>Skills/Knowledge Areas</u>	<u>Rating</u>
Accounting -----	_____
Computer Skills -----	_____
Counseling for Seniors & Their Families -----	_____
Customer Service -----	_____
Employment Laws -----	_____
Ethics -----	_____
Finance -----	_____
Food and Beverage Management -----	_____
Front Desk/Concierge Operations -----	_____
Government/Social Welfare Programs -----	_____
Grant Writing -----	_____
Human Resource Management -----	_____
Leadership -----	_____
Lodging Operations -----	_____
Long Term Care -----	_____
Marketing -----	_____
Multiculturalism -----	_____
Nutrition -----	_____
Program Planning for Seniors -----	_____
Psychology of Aging -----	_____
Public Relations -----	_____
Real Estate Law -----	_____
Recreation and Leisure Programming -----	_____
Research Techniques -----	_____
Retirement/Estate Planning -----	_____
Senior Health and Wellness Issues -----	_____
Senior Housing -----	_____
Statistics -----	_____

PLEASE LIST (AND RATE) ADDITIONAL SKILLS/KNOWLEDGE AREAS YOU FEEL ARE IMPORTANT TO SUCCEEDING IN THE FIELD OF RETIREMENT COMMUNITY MANAGEMENT.

Panelist Demographics

Panelist # _____

Gender: _____

Age: _____ (Optional)

Years Employed in Senior Housing Industry: _____

Current Position: _____

How Long in Current Position: _____

Number of People You Supervise: _____

Degree (s) Held / Institution(s) Awarded From:

1. _____

2. _____

3. _____

4. _____

Appendix B

Survey Instructions

1. Review the stated purpose at the top of the survey form.
2. Review the enclosed list of University courses in its entirety.
3. Identify the 13 courses you feel would best combine to prepare an individual for a career in retirement community management.
4. Record your selections on the blank survey form, noting both the number and title of each course you choose.
5. Select EXACTLY 13 courses, noting exactly one course on each blank line of the survey form.
6. Use the enclosed envelope (stamped and addressed) to return your completed survey NO LATER THAN NOVEMBER 18th.
7. Complete the survey independently and contact me by phone if you have any questions.

I can be reached at (310) 474-5227.

Panelist # _____

Statement of Purpose:

To identify a set of 13 University courses, selected from the enclosed list, which would best prepare a student for a career in retirement community management.

<u>Course #</u>	<u>Course Title</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

COMPLETE AND RETURN BY November 18, 1999.

University Course Listings

1. Accounting and Management Decision Making

Introduction to financial accounting for graduate students who do not have an accounting background. From a user rather than a preparer perspective. Prepares future managers to interpret and utilize financial information. Students who successfully complete this course will understand basic accounting principles and methods that underlie published financial reports.

2. Aging Programs and Services

Introduction to the history of social policy in aging; derivations and directions of public policy, interrelationships of agencies; discussion of selected programs and services for the aged.

3. Aspects of Long-Term Care: Health

Health and quality of care, medical ethics, environmental health, and delivery of health services in a long-term care facility are addressed.

4. Aspects of Long-Term Care: Social

Review of various social aspects in long-term care including types of environments and services offered, process of entry into long-term care systems, physical care, socio-emotional care, relations between residents and staff members, social relationships outside of long-term care facilities, and organization of long-term care.

5. Consumer and Market Behavior

Influence of consumer behavior upon marketing management strategy; examination of behavioral concepts as they relate to purchase decisions; types of consumer research instructions and applications; focus on buyer behavior in action-oriented environments.

6. Financial Management

Introduces the structure, markets and regulatory factors within the financial system. Develops basic skills in preparing financial plans/budgets, valuing capital costs, financial assets and evaluating the firm's capital structure, cost of capital, working capital, dividend policies, financing and investment decisions.

7. Fundamentals of Finance

The finance function and its relationship to other decision-making areas in the firm; the study of theory and techniques in acquisition and allocation of financial resources from an internal management perspective.

8. Health Aspects of Human Aging

Examination of general and cellular theories of aging and general age-related changes in various body systems. Issues covered include myths and facts about physical health and aging, normal age-related changes and common chronic illnesses associated with old age. Students will become familiar with medical terminology to facilitate effective communication with health care professionals who work with the elderly in both institutional and community settings.

9. Hotel Front Office Management

A course to examine hotel front office functions, such as reservation systems and operations, guest registration, bell service, accounting and income control, housekeeping, and guest check-out.

10. Housing for the Elderly: Planning, Public Policy & Research

Theoretical, research and practical literature concerning housing alternatives is considered. Emphasis is on the four housing development stages: need assessment, financing, physical design and management of a housing site; and how theory, research and public policy relate to each of these issues.

11. Human Resources Foundations

Introduction to concepts, issues and practices of modern human resource management and their impact on organizational effectiveness. Students develop critical appreciation of the role human resources management plays in the dynamic environment in which organizations operate. Includes human resource planning, recruitment, selection, training and career development, performance appraisal, compensation and benefits, employee and labor relations and employee rights.

12. Introduction to Computers in Business

A study of the introductory concepts of computing in business; basic computer components, computer history and programming.

13. Law, Labor and Employee Relations

Provides working knowledge of the legal system and its relationship to employer and employee. Legal topics presented in organizational context in which they arise. Includes

unions and their affect on workers' productivity and organizational outcomes, employment-at-will, discipline of employees, and federal employment laws.

14. Leadership

Explores classic and contemporary models of leaders and leadership and defines the difference between management and leadership. Practical applications of theory emphasizing the contingency perspective.

15. Management Skills and Problem Solving

Develops management skills necessary for career success. Particularly emphasizes the role of judgement, creativity and information processing in both individual and group decision settings. Includes risk assessment, choice under uncertainty, problem structuring and other decision processes.

16. Marketing Management

Fundamental concepts and skills necessary for understanding markets and managing marketing efforts. Includes market orientation, consumer and industrial buyer behavior, market segmentation, target market identification, product development, pricing, distribution channels, marketing communication, strategy development and marketing planning and control.

17. Principles of Food and Beverage Operations

Overview of food and beverage with emphasis on food quality.

18. Principles of Public Relations

Principles, history and professional practice of public relations. The processes of influencing public opinion, effective communication concepts and the basic steps of public relations programming.

19. Professional/Business Ethics

Ethical principles relevant to decision-making in business situations. Using case studies, examines and analyzes moral issues to determine the most appropriate actions. Experiential and self-reflective as well as theoretical.

20. Psychological Counseling for Late Maturity and Old Age

Study of the predictable and normal dependencies of aging; techniques of individual, family and group counseling applied to later life with emphasis on problems of retirement, health and bereavement.

21. Psychology of Aging

Developmental patterns of aging (middle to old age); cognition, personality, interpersonal relationships, psychology and physiology of health, living arrangements, aging in other cultures and times, dying and death and counseling.

22. Service Operations Management

Develops skills in setting formal standards for product attributes and operating procedures that comprise service experience. Categories of services; indirect and direct consumption. Psychological/social characteristics of the consumer/server encounters, enhancing ability to monitor service quality. Total quality management.

23. Visual Display of Business Information

Management issues relative to the computerized work place. Designed for those people who do not need a detailed working knowledge of computers, yet should be conversant in computer outputs.

Appendix C

Survey #2 Instructions

1. Remember that the goal of this process is to identify a set of 13 college courses that would most effectively prepare an individual for a career in retirement community management.
2. Review the enclosed list of 10 courses that have already been selected for inclusion (by group consensus).
3. Using the course listing stapled to the blank survey form, select the three courses you feel would best combine with the 10 already chosen, (for a total of 13).
4. Please select EXACTLY 3 courses and note your choices on the blank survey form, identifying them by their number AND title.
5. Please remember to complete the survey independently.
6. RETURN THE SURVEY FORM, BY MAIL OR BY FAX, NO LATER THAN DECEMBER 13th, 1999.

Fax #: (650) 573-7579

ALSO: If you return your survey by mail, please keep a copy of your response sheet in case of a problem with the postal delivery.

10 Courses Already Selected For Inclusion

Accounting and Management Decision Making

Introduction to financial accounting for graduate students who do not have an accounting background. From a user rather than a preparer perspective. Prepares future managers to interpret and utilize financial information. Students who successfully complete this course will understand basic accounting principles and methods that underlie published financial reports.

Aspects of Long-Term Care: Social

Review of various social aspects in long-term care including types of environments and services offered, process of entry into long-term care systems, physical care, socio-emotional care, relations between residents and staff members, social relationships outside of long-term care facilities, and organization of long-term care.

Financial Management

Introduces the structure, markets and regulatory factors within the financial system. Develops basic skills in preparing financial plans/budgets, valuing capital costs, financial assets and evaluating the firm's capital structure, cost of capital, working capital, dividend policies, financing and investment decisions.

Human Resources Foundations

Introduction to concepts, issues and practices of modern human resource management and their impact on organizational effectiveness. Students develop critical appreciation of the role human resources management plays in the dynamic environment in which organizations operate. Includes human resource planning, recruitment, selection, training and career development, performance appraisal, compensation and benefits, employee and labor relations and employee rights.

Law, Labor and Employee Relations

Provides working knowledge of the legal system and its relationship to employer and employee. Legal topics presented in organizational context in which they arise. Includes unions and their affect on workers' productivity and organizational outcomes, employment-at-will, discipline of employees, and federal employment laws.

Leadership

Explores classic and contemporary models of leaders and leadership and defines the difference between management and leadership. Practical applications of theory emphasizing the contingency perspective.

Management Skills and Problem Solving

Develops management skills necessary for career success. Particularly emphasizes the role of judgement, creativity and information processing in both individual and group decision settings. Includes risk assessment, choice under uncertainty, problem structuring and other decision processes.

Marketing Management

Fundamental concepts and skills necessary for understanding markets and managing marketing efforts. Includes market orientation, consumer and industrial buyer behavior, market segmentation, target market identification, product development, pricing, distribution channels, marketing communication, strategy development and marketing planning and control.

Principles of Food and Beverage Operations

Overview of food and beverage with emphasis on food quality.

Psychology of Aging

Developmental patterns of aging (middle to old age); cognition, personality, interpersonal relationships, psychology and physiology of health, living arrangements, aging in other cultures and times, dying and death and counseling.

Panelist # _____

Select 3 courses from attached University Course Listings

Course #

Course Title

_____	_____
_____	_____
_____	_____

COMPLETE AND RETURN BY December 13, 1999.

University Course Listings

2. Aging Programs and Services

Introduction to the history of social policy in aging; derivations and directions of public policy, interrelationships of agencies; discussion of selected programs and services for the aged.

3. Aspects of Long-Term Care; Health

Health and quality of care, medical ethics, environmental health, and delivery of health services in a long-term care facility are addressed.

8. Health Aspects of Human Aging

Examination of general and cellular theories of aging and general age-related changes in various body systems. Issues covered include myths and facts about physical health and aging, normal age-related changes and common chronic illnesses associated with old age. Students will become familiar with medical terminology to facilitate effective communication with health care professionals who work with the elderly in both institutional and community settings.

12. Introduction to Computers in Business

A study of the introductory concepts of computing in business; basic computer components, computer history and programming.

18. Principles of Public Relations

Principles, history and professional practice of public relations. The processes of influencing public opinion, effective communication concepts and the basic steps of public relations programming.

19. Professional/Business Ethics

Ethical principles relevant to decision-making in business situations. Using case studies, examines and analyzes moral issues to determine the most appropriate actions. Experiential and self-reflective as well as theoretical.

20. Psychological Counseling for Late Maturity and Old Age

Study of the predictable and normal dependencies of aging; techniques

of individual, family and group counseling applied to later life with emphasis on problems of retirement, health and bereavement.

22. Service Operations Management

Develops skills in setting formal standards for product attributes and operating procedures that comprise service experience. Categories of services; indirect and direct consumption. Psychological/social characteristics of the consumer/server encounters, enhancing ability to monitor service quality. Total quality management.

Appendix D

Survey #3 Instructions

1. Remember that the goal of this process is to identify a set of 13 college courses that would most effectively prepare an individual for a career in retirement community management.
2. Review the enclosed list of 11 courses that have already been selected for inclusion (by group consensus).
3. Using the course listing at the bottom of the blank survey form, select the two courses you feel would best combine with the 11 already chosen, (for a total of 13).
4. Please select EXACTLY 2 courses and note your choices on the blank survey form, identifying them by their number AND title.
5. Please remember to complete the survey independently.
6. RETURN THE SURVEY FORM, BY MAIL OR BY FAX, NO LATER THAN DECEMBER 20th, 1999.

Fax #: (650) 573-7579

ALSO: If you return your survey by mail, please keep a copy of your response sheet in case of a problem with the postal delivery.

11 Courses Currently Selected For Inclusion

Accounting and Management Decision Making

Introduction to financial accounting for graduate students who do not have an accounting background. From a user rather than a preparer perspective. Prepares future managers to interpret and utilize financial information. Students who successfully complete this course will understand basic accounting principles and methods that underlie published financial reports.

Aspects of Long-Term Care: Social

Review of various social aspects in long-term care including types of environments and services offered, process of entry into long-term care systems, physical care, socio-emotional care, relations between residents and staff members, social relationships outside of long-term care facilities, and organization of long-term care.

Financial Management

Introduces the structure, markets and regulatory factors within the financial system. Develops basic skills in preparing financial plans/budgets, valuing capital costs, financial assets and evaluating the firm's capital structure, cost of capital, working capital, dividend policies, financing and investment decisions.

Health Aspects of Human Aging

Examination of general and cellular theories of aging and general age-related changes in various body systems. Issues covered include myths and facts about physical health and aging, normal age-related changes and common chronic illnesses associated with old age. Students will become familiar with medical terminology to facilitate effective communication with health care professionals who work with the elderly in both institutional and community settings.

Human Resources Foundations

Introduction to concepts, issues and practices of modern human resource management and their impact on organizational effectiveness. Students develop critical appreciation of the role human resources management plays in the dynamic environment in which organizations operate. Includes human resource planning, recruitment, selection, training and career development, performance appraisal, compensation and benefits, employee and labor relations and employee rights.

Law, Labor and Employee Relations

Provides working knowledge of the legal system and its relationship to employer and employee. Legal topics presented in organizational context in which they arise. Includes unions and their affect on workers' productivity and organizational outcomes, employment-at-will, discipline of employees, and federal employment laws.

Leadership

Explores classic and contemporary models of leaders and leadership and defines the difference between management and leadership. Practical applications of theory emphasizing the contingency perspective.

Management Skills and Problem Solving

Develops management skills necessary for career success. Particularly emphasizes the role of judgement, creativity and information processing in both individual and group decision settings. Includes risk assessment, choice under uncertainty, problem structuring and other decision processes.

Marketing Management

Fundamental concepts and skills necessary for understanding markets and managing marketing efforts. Includes market orientation, consumer and industrial buyer behavior, market segmentation, target market identification, product development, pricing, distribution channels, marketing communication, strategy development and marketing planning and control.

Principles of Food and Beverage Operations

Overview of food and beverage with emphasis on food quality.

Psychology of Aging

Developmental patterns of aging (middle to old age); cognition, personality, interpersonal relationships, psychology and physiology of health, living arrangements, aging in other cultures and times, dying and death and counseling.

Panelist # _____

Select 2 courses from the University Course Listings Below.

<u>Course #</u>	<u>Course Title</u>
_____	_____
_____	_____

University Course Listings

18. Principles of Public Relations

Principles, history and professional practice of public relations. The processes of influencing public opinion, effective communication concepts and the basic steps of public relations programming.

19. Professional/Business Ethics

Ethical principles relevant to decision-making in business situations. Using case studies, examines and analyzes moral issues to determine the most appropriate actions. Experiential and self-reflective as well as theoretical.

22. Service Operations Management

Develops skills in setting formal standards for product attributes and operating procedures that comprise service experience. Categories of services; indirect and direct consumption. Psychological/social characteristics of the consumer/server encounters, enhancing ability to monitor service quality. Total quality management.

COMPLETE AND RETURN BY DECEMBER 20, 1999.