

Life Plan Community

THE RECOMMENDED NEW CATEGORY NAME
FOR CONTINUING CARE RETIREMENT COMMUNITY

About This Whitepaper

On November 1, 2015, at the LeadingAge Annual Meeting in Boston, the task force that led the initiative to develop a new category name for Continuing Care Retirement Community (“CCRC”) announced its recommendation that communities adopt the term “Life Plan Community” as the new descriptor. This recommendation followed several years of work and research involving hundreds of CCRCs and business partners, and is designed to generate broader awareness and acceptance of CCRCs in the years ahead.

In this overview of what has been known as the “NameStorm” initiative, we recap the reasons for the initiative, the process followed to develop a new name, and the steps communities should take to begin putting Life Plan Community into everyday use.

Purpose and Goals

Why “Life Plan Community?”

Life shows that our communities are about so much more than care: They are about living life to the fullest.

Plan captures the unique “safety net” advantages that CCRCs offer through advanced healthcare services.

A *Life Plan Community* allows “planning” and “living” to merge. Having a plan in place allows for living life to the fullest.

In 1980, researchers estimated that there were about 100,000 seniors (less than 1% of the 70+ population) living in one of 274 CCRC-like communities throughout the United States. Today, there are about 2,000 CCRCs with about 600,000 residents, or only 2% of the 70+ population. Considering the benefits of living in a CCRC (residents live longer with healthier lives) and that residents report high satisfaction rates for living in a CCRC, the rate of market acceptance and growth of CCRCs has been slow.

For many years, a significant number of CCRCs have been concerned that the very category name used to describe them actually limits consumer interest.

In particular, the terms “**continuing care**” and “**retirement**” were perceived to have negative connotations among potential residents, leaving them with the impression that communities were only for people that need care, and thus are for older, less healthy people. The potential truth of this is evidenced by the continuing increase in the average age of people moving to CCRCs over the last decade. In fact, many communities and organizations have stopped referring to themselves as Continuing Care Retirement Communities altogether, developing their own alternative wording to describe the lifestyle benefits their communities offer.

The NameStorm Task Force

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The goal of the NameStorm initiative was to develop a new brand category name that all communities could consistently adopt, along with corresponding **messaging that speaks to the next cohort of older adults (over the next 10+ years) in a way that will increase overall interest, engagement and enrollment in CCRCs** while also reducing the average age at which people decide to move. The NameStorm Task Force set out to identify a name that resonates with this cohort in a meaningful way, reflects the lifestyle and attitudes of the next generation of potential residents, and expands the market’s perception of the possibilities for a healthy and rewarding life in retirement. By doing this, the end goal is to attract more older adults to the CCRC concept.

The Name Development Process

Project NameStorm was jointly initiated by LeadingAge, a national association of not-for-profit senior living organizations, and Mather LifeWays, an Illinois-based not-for-profit organization with communities and service offerings in both Illinois and Arizona. The NameStorm Task Force was then formed, including representatives of LeadingAge, Mather LifeWays, and five leading senior living marketing and research organizations. Led by the task force, the name development utilized the following process.

1. Community NameStorming

As a first step, more than 100 communities across the United States participated in a structured “NameStorming” process in which they identified words and terms they felt best represented the most positive attributes of CCRCs. Communities used these words and terms to develop potential new category names, which were then submitted to LeadingAge. **Hundreds of new category name options were developed by the communities.**

Members of the task force then reviewed the community submissions, evaluating them against a series of important name criteria, including such factors as, “Is it easy to remember?” and “Does it describe a fulfilling life experience?” Using this process, the name options were narrowed down to a list of the top 10 new category names to consider.

2. Nationwide survey research

Following the completion of the initial community NameStorming process, consumer reactions to the top 10 name recommendations—as well as the current category name, Continuing Care Retirement Community—were evaluated through a series of online and paper-based surveys. The surveys were distributed to CCRC residents, prospects, family members, staff members, CCRC professionals, and the next generation of potential CCRC prospects—those currently age 65 and younger. In all, more than **4,100 surveys were completed from all across the country.**

The survey process affirmed many of the basic assumptions of the NameStorm process in that—across all age groups—the majority believed there was a better name for the category than CCRC. In fact, of the potential future consumers aged 65 and younger—perhaps the most important segment of the market to begin influencing now—84% preferred a category name other than CCRC.

At the end of the survey process, each of the 10 name options were scored on 15 different criteria to determine respondents’ perceptions of each name, and an initial ranking of those 10 options was developed.

3. Focus group research

In the next phase of the development process, more than 250 individuals—CCRC residents, prospects and potential future consumers of senior living (those under age 65) participated in **34 focus groups led by NameStorm Task Force members in Austin, Baltimore, Chicago, Harrisburg, Kansas City, Portland (Oregon), and Richmond.** In each group, participants were asked to share their reactions through a detailed discussion of the top five name options, as well as the current name, Continuing Care Retirement Community. Participants also shared their reactions in a more brief review of the five lower ranked name options.

Like the surveys, the focus groups also reinforced concerns about the current CCRC name, especially among younger prospects. The greatest concerns revolved around the term “continuing care,” which definitely did not instill a positive impression. Participants also had a concern about “retirement.” All of the groups of potential future senior living consumers responded more positively to the new name options than to “CCRC.”

4. Task force evaluation

The members of the task force then convened to review the detailed findings from both phases of the research, evaluating which names scored highest among each constituent group included in the research process. From this, **a short list of name options was identified to move into the final phase of evaluation.**

5. Trademark evaluation

The final step in the process was to determine potential trademark conflicts for any of the short list name options. To do the research, LeadingAge contracted with a national trademark attorney. The results showed that (not surprisingly, as the names were initially developed by communities themselves) some of the top name choices were already in use and, in some cases, were trademarked by existing CCRCs. At the end of the entire process, the one name that rose above the rest—including positive evaluations from the research—was **Life Plan Community.**

The Case for Life Plan Community

Potential Messaging Opportunities for Life Plan Community

- *I'm not planning my days...I'm living them!*
- *This is my Life. This is my Plan.*
- *I'm planning to live, not living to plan.*
- *Life: Plan it. Live it. Love it.*
- *My life. My plan. My community.*

The NameStorm Task Force, along with leaders of **many LeadingAge member communities with which the new name has been shared, are excited about the potential that “Life Plan Community” has for our communities.** The next cohort of baby boomers does not view retirement like their predecessors. They are planners who are self-directed and want a future filled with possibilities. They are planning for the life they want to lead.

A Life Plan Community allows “planning” and “living” to merge, rather than being in opposition to one another. Having a plan in place—the security of the safety net

provided by the availability of healthcare, coupled with the freedom from not having to manage all the day-to-day tasks that come with homeownership—allows for living life to the fullest. This name gives us a chance to have a conversation that is expansive and aspirational—something “CCRC” could never do.

There is an opportunity to provide strong messaging around the new name, messaging that will accomplish the goals set out at the beginning of the NameStorm process: increasing overall interest, engagement and enrollment in CCRCs.

What Do You Do Next?

The objective, of course, is for as many communities as possible to begin using the new name on your website and in other materials in tandem with CCRC. Until mass adoption, we need to be clear as to not confuse regulators, rating agencies, financial markets, and investors.

Start using Life Plan Community in your marketing and other communications now. For more information and a how-to guide to get started, visit **LifePlanCommunities.org**. This website includes a list of implementation steps, along with template news releases, fliers and other materials you can use at your community.