

Life Plan Community Launch Kit

We are excited that you have decided to adopt Life Plan Community as the new category name for Continuing Care Retirement Community. The NameStorm task force has put this kit together to help you identify the steps to successfully roll out and adopt the Life Plan Community.

Inside the Launch Kit you will find the following:

Get the Facts. This section has a quick fact sheet and a more in-depth whitepaper you can share with your leadership and key stakeholders.

Communications Audit. This section has a great checklist of all the places you may be currently using CCRC—places to add the Life Plan Community name.

Internal Roll-Out. This section suggests options for rolling out these changes with those inside your organization, your residents and their families, as well as some sample documents you can use.

External Communications. This section suggests ways to introduce Life Plan Community to your local media and leads with a sample release, emails and social media posts.

Get the Facts

With any big change like renaming a category that's been around 35 years, there will be lots of questions and possible concerns around changing what's always been.

Information is power!

Familiarize yourself with the documents at the end of this toolkit and you will be an expert on how Life Plan Community came to be and can easily answer any questions posed to you about this initiative.

At the end of this toolkit, you will find the Fact Sheet (**Appendix A**) as well as a more in-depth whitepaper entitled *Life Plan Community: The Recommended New Category Name for Continuing Care Retirement Community* (**Appendix B**).

You will also find the latest news on this effort at **[LifePlanCommunity.org](https://www.lifeplancommunity.org)**.

Communications Audit

Create a list of all of the places where the term “Continuing Care Retirement Community” appears. This may seem overwhelming, but it’s a good idea to gather all of the materials first and then prioritize the order in which you can make changes, weighing time and cost. You may not have the time or budget to update all of the hard copy documents at once. Make changes over time with a completion date in mind.

- **Branding materials**

- a) Identity materials
 - Logo/tagline
 - Stationery package
 - Mission/vision statements
- b) Email signatures
- c) Signage
- d) Contracts
- e) Pricing documents
- f) Forms
- g) Vehicles
- h) Hold music and voicemail outgoing messages
- i) Brochure/sales package

- **Media relations**

- a) Press release templates
- b) “About us” text used as boilerplate language
- c) Media kits

- **Online materials**

- a) Website
 - Content
 - Meta tags—keywords, descriptions, titles
 - Images with text in them
 - b) Descriptions in social media profiles
 - c) Online advertising (Don’t forget to check images with text!)
 - d) Google Adwords text, purchased and designated keywords
- Note: Keep old CCRC keywords and add Life Plan Community keywords!*

- **Advertising materials**

- a) TV, print, radio, billboard
- b) Direct mailers
- c) Giveaways
- d) Company descriptions in online and hard copy directory listings (free and paid)

Internal Roll-Out

Now that you are a NameStorm and Life Plan Community expert, it's time to roll out the name within your community. Identify which audiences need to understand this change and in what order. Since you want to garner support for the name adoption, think through who will help you do that the most. Consider in-person conversations with your most influential staff members to get buy-in before rolling this out widely to the entire organization.

If you are a multi-site community with a corporate office structure, you will likely need to start at the corporate office and senior leadership first, so that everyone is bought in before rolling it out to communities.

Possible checklist of key internal audiences

Executive team/senior management

Board of directors

Sales & marketing team

Marketing/communications agencies of record

Employees

Residents

Family members

Consider the best approach for your organization

Using the key messages provided in **Appendix A and B**, determine what messages are appropriate for each audience identified. Be sure to be mindful to communicate why you are making this change (why does it matter, how will it affect each audience, *why* your community has to be a part of this movement).

Here are some suggestions:

- Always showcase your excitement and enthusiasm and connect back to either your mission or focus on older adults and the future of senior living.
- Carve out time to personally tell the most influential members whose opinion is highly respected.
- Distribute the full Life Plan Community white paper (see **Appendix A**) to the management team and board members.
- Email an announcement to staff and residents (see **Appendix C** for internal communications templates)
- Announce at resident meetings
- Distribute fliers to staff and residents (see **Appendix C** for internal communications templates)

External Communications

Use your commitment to Life Plan Community to your advantage in the marketplace. Share it with the public. It is best to hold on making external announcements until your internal team and your materials reflect the new name and new perspective.

Possible checklist of key external audiences

Prospects

Media

Market-at-large

Professional referral sources

Community partners

Local competitors (potentially)

Here are some suggestions:

- Issue a news release (see **Appendix D**).
- Email an announcement to leads and partner organizations (see **Appendix D**).
- Post an announcement on social media (see **Appendix D**).
- Incorporate into all sales presentations
- Schedule presentations at community organizations explaining the change

Appendix A – Fact Sheet

Life Plan Community

OUR NEW CATEGORY NAME FOR “CCRC”

WHY “LIFE PLAN COMMUNITY”?

- This name allows for a conversation that is expansive and aspirational — something “CCRC” could never do.
- “Life Plan Community” allows “planning” and “living” to merge, rather than being in opposition to one another.
- The new name tested positively with consumers, who felt that it centered around them and their needs, was easy to remember and made them want to learn more.

THE REASON FOR CHANGING THE NAME

- Rate of CCRC market acceptance and growth has been slow.
- We need a category name with corresponding messaging that speaks to the next cohort of older adults seeking services (in the next 10+ years).
- We need to increase overall interest, engagement and enrollment, and also lower the age at which people decide to move to a CCRC.
- CCRCs are about more than just care. We need a term that conveys that residents are empowered to live life to the fullest — whether or not care is needed.

HOW YOU CAN HELP LEAD THE MOVEMENT

- Begin using “Life Plan Community” in your marketing and other communications
 - Start by including the name on your website and in any of your newly developed materials
 - Avoid shortening to “LPC,” since we want to give meaning to the term, rather than simply changing one abbreviation for another
- Share your excitement on social media, using **#LifePlanCommunity**, and spread the word!

We understand that state regulations may require the term “Continuing Care Retirement Community/CCRC” in your contracts and in other materials (for now), but we need operators to begin using the name in tandem with “CCRC.”

For more information and updated resources, visit LifePlanCommunity.org
or contact us at LifePlanCommunity@LeadingAge.org

ORGANIZATIONS PARTNERING IN PROJECT NAMESTORM

**BROOKS
ADAMS
RESEARCH**

GLYNNDEVINS **GD**

LeadingAge[™]

**LOVE
& COMPANY**
SENIOR MARKETING SPECIALISTS

matherlifeways[®]
Ways to Age Well

SB&A
INTEGRATED MARKETING

VARSITY[®]
— WINNING THE MATURE MARKET[™]—

Appendix B – Whitepaper

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 **LifePlanCommunity.org**. This website includes a list of implementation steps, along with template news releases, fliers and other materials you can use at your community.

Appendix C – Internal Communications Templates

(Template Email Announcement to Staff and Residents)

(Subject Line)

[Community Name] is now a Life Plan Community

(Body copy)

[Community Name] is proud to be part of a nationwide initiative to rename “Continuing Care Retirement Communities” as Life Plan Communities. This initiative is designed to help communicate to the public that communities like [Community Name] are about so much more than care: We are about life, and living life to its fullest.

The selection of the name “Life Plan Community” is the result of a multi-year effort led by LeadingAge and Mather LifeWays, a not-for-profit organization which owns and operates two CCRCs, in conjunction with a task force consisting of five leading marketing and research firms that specialize in senior living. Hundreds of ideas for a new name were submitted by CCRCs around the country through a national “NameStorming” process, and the top names were then tested for consumer understanding and acceptance through a series of surveys and focus groups. More than 4,100 people nationwide responded to the surveys, and more than 250 people participated in the 34 focus groups around the country.

Why are we excited to be a “Life Plan Community”? As you know, the senior living field is preparing for the tremendous wave of adults that will start turning 75 in about five years. Research has consistently shown that this next generation of potential residents does not respond positively to the term “Continuing Care Retirement Community.” They are self-directed planners who aren’t looking for “care”; rather, they want a life filled with possibilities and options.

We believe communities like [Community Name] are ideal options for older adults. As a Life Plan Community, we allow “planning” and “living” to merge. 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 residents to live life to the fullest. This name gives us a chance to have a conversation with prospects that is expansive and aspirational—something that’s been a challenge with a category name like “Continuing Care Retirement Community.”

If you would like more information on the NameStorm initiative, or on the selection of the name Life Plan Community, please visit **[LifePlanCommunity.org](https://www.LifePlanCommunity.org)**.

(Template Flyer for Staff and Residents)

[Community Name] is now a Life Plan Community

[Community Name] is proud to be part of a nationwide initiative to rename “Continuing Care Retirement Communities” as Life Plan Communities. This initiative is designed to help communicate to the public that communities like [Community Name] are about so much more than care: We are about life, and living life to its fullest.

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For more information, please visit **[LifePlanCommunity.org](https://www.lifeplancommunity.org)**.

Appendix D – External Communications Templates

(Template News Release)

For Immediate Release

Date: [Date]

[Community Name] Adopts “Life Plan Community” Designation

[Community name] recently announced it was adopting the new designation of “Life Plan Community,” in support of a national movement of similar communities to change from being known as a “Continuing Care Retirement Community,” or “CCRC.”

“This is exciting, not just for [Community Name], but for all communities like us,” said [Community Name] president, [president name]. “For years, the name ‘Continuing Care Retirement Community’ has given people in our market—and markets everywhere—a misleading impression of what communities like [Community Name] are. They have looked at CCRCs and thought they were all about ‘care,’ whereas the people that actually move to communities like us know we’re all about getting the most out of life.”

The term Continuing Care Retirement Community was coined nearly 35 years ago to describe the growing number of communities that provide a continuum of living and care options for older adults, starting with apartments and homes in which residents could live independently, then providing assisted living and skilled nursing residences that residents could move into if and when their health needs ever changed.

“Today’s Life Plan Communities are nothing like those CCRCs of thirty or more years ago,” said [Mr./Ms. President name]. “While, as a [not-for-profit or member of the] community, we certainly are proud of our healthcare services, we offer so much more. We have large residential homes with full-size appliances and all the amenities found in new homes today. More importantly, we offer fitness and wellness programs, fine dining, creative enrichment programs, socializing opportunities, and much, much more. And of course, we still take care of all the home maintenance, housekeeping, yard work and snow shoveling!”

The new name, “Life Plan Community,” is the result of a multi-year effort coordinated by LeadingAge, a national association of not-for-profit aging services organizations, and Mather LifeWays, a not-for-profit organization which owns and operates two CCRCs. The new name was reached after extensive nationwide research was conducted, including feedback from more than 4,100 survey respondents and 250 focus group participants.

“I’m really excited about the new name,” said [Mr./Ms. President name]. “It really draws attention to our community being about life, not just care. And people that move to communities like ours tend to be planners, people who like to know they’ve made the decisions they need to make to ensure they have a solid plan in place for their future.”

“The most common thing we hear from new residents,” continued [Mr./Ms. President name], is that they say they should have moved in two years earlier. I think this new name will help more people understand just how beneficial moving to a community like [Community Name] is, and help them decide to move earlier, so that they can take maximum advantage of all we have to offer.”

For more information on the evolution of the name Life Plan Community, please visit [LifePlanCommunity.org](https://www.LifePlanCommunity.org).

For more information on [Community Name], please visit [www.\[website address\]](http://www.[website address]).

Media contact:

[Individual name]

[Organization name]

[email address]

[Phone #]

(Template Email Announcement to Leads and Partner Organizations)

(Subject Line)

[Community Name] is now a Life Plan Community

(Body copy)

[Community Name] is proud to be part of a nationwide initiative to rename “Continuing Care Retirement Communities” as Life Plan Communities. This initiative is designed to help communicate to the public that communities like [Community Name] are about so much more than care: We are about life, and living life to its fullest.

Research has shown that, for years, the name ‘Continuing Care Retirement Community’ has given people a misleading impression of what communities like [Community Name] are. While, as a [not-for-profit or member of the] community, we certainly are proud of our healthcare services, [Community Name] offers so much more, and being a Life Plan Community helps us communicate that.

We have large residential homes with full-size appliances and all the amenities found in new homes today. More importantly, we offer fitness and wellness programs, fine dining, creative enrichment programs, socializing opportunities, and much, much more. And of course, we still take care of all the home maintenance, housekeeping, yard work and snow shoveling!

People that move to communities like [Community Name] tend to be planners, people who like to know they’ve made the decisions they need to make to ensure they have a solid plan in place for their future. A Life Plan Community like [Community Name] provides just what they need. It allows “planning” and “living” to merge. 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.

Want more information on what life in a Life Plan Community is like? Call or email us today!

(Template Social Media Post)

(Facebook)

[Community Name] is now a Life Plan Community

[Community Name] is proud to be part of a nationwide initiative to rename “Continuing Care Retirement Communities” as Life Plan Communities. This initiative is designed to help communicate to the public that communities like [Community Name] are about so much more than care: We are about life, and living life to its fullest.

Want more information on what life in a Life Plan Community is like? Call or email us today!

(Twitter)

We've join the movement. We're a **#LifePlanCommunity**

My life. My Plan. My Community. [Community Name] is now a **#LifePlanCommunity**

Don't plan your days. Live them! [Community Name] is now a **#LifePlanCommunity**

[Community Name] helps you live your life to the fullest. **#LifePlanCommunity**