

2009  
Overview of  
Assisted Living

*A collaborative research project of AAHSA, ASHA, ALFA, NCAL & NIC*





### **American Association of Homes and Services for the Aging**

The members of the American Association of Homes and Services for the Aging serve two million people every day through mission-driven, not-for-profit organizations dedicated to providing the services people need, when they need them, in the place they call home. AAHSA members offer the continuum of aging services: adult day services, home health, community services, senior housing, assisted living residences, continuing care retirement communities, and nursing homes. AAHSA's commitment is to create the future of aging services through quality people can trust.

2519 Connecticut Avenue NW  
Washington, DC 20008-1520  
202.783.2242 • [www.aahsa.org](http://www.aahsa.org)



### **American Seniors Housing Association**

Members of ASHA are executives involved in the operation, development and finance of the entire spectrum of seniors housing—senior apartments, independent living communities, assisted living residences, and continuing care retirement communities. Created in 1991, the American Seniors Housing Association provides leadership for the seniors housing industry on legislative and regulatory matters; advances research, education, and the exchange of strategic business information; and promotes the merits of seniors housing.

5100 Wisconsin Avenue, NW, Suite 307  
Washington, DC 20016  
202.237.0900 • [www.seniorshousing.org](http://www.seniorshousing.org)



### **Assisted Living Federation of America**

The Assisted Living Federation of America (ALFA) is the largest national association exclusively dedicated to professionally operated assisted living communities for seniors. ALFA's member-driven programs promote business and operational excellence through national conferences, research, publications, and executive networks. ALFA works to influence public policy by advocating for informed choice, quality care, and accessibility for all Americans seeking assistance with long-term care. The association is laser-focused on providing tools to advance operational excellence in its member companies. The five focal areas of operational excellence include: Growth Strategies, Quality Resident Services, Leadership, Community Systems/Infrastructure, and Quality Performance Management.

1650 King Street, Suite 602  
Alexandria, VA 22314-2747  
703.894.1805 • [www.alfa.org](http://www.alfa.org)



### **National Center for Assisted Living**

The National Center for Assisted Living (NCAL) is committed to quality and performance excellence in the assisted living profession and actively supports Quality First, a covenant for healthy, affordable and ethical long-term care, and adherence to its principles and goals. NCAL, a federation of state affiliates, represents more than 2,200 non-profit and for-profit assisted living residences and residential care facilities that are dedicated to professional and compassionate care for the elderly and disabled.

1201 L Street, NW  
Washington, D.C. 20005  
202.882.4444 • [www.ncal.org](http://www.ncal.org)



### **National Investment Center for the Seniors Housing & Care Industry**

Since its creation in 1991, NIC has served as a valuable resource to lenders, investors, developers/operators, and others interested in meeting the housing and health-care needs of America's seniors. NIC's mission is to advance the seniors housing and care industry by facilitating informed investment decision-making and providing excellence in networking, professional education, and research.

705 Melvin Avenue, Suite 201  
Annapolis, MD 21401  
410.267.0504 • [www.nic.org](http://www.nic.org)



### **Research conducted and analyzed by Acclaro Growth Partners**

Acclaro focuses on revealing the most efficient path to corporate growth. A strategic advisory firm, Acclaro serves senior executives of mid-sized corporations, their equity investors, and the trade associations to which they belong.

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# Introduction

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We are pleased to present the *2009 Overview of Assisted Living*. The 2009 Overview is the single most important effort to provide core national metrics about the assisted living customer and provides an invaluable statistical resource for senior housing providers, policymakers, regulators, consumers, consumer advocates, and health-care professionals.

The research was conducted by the research and consulting firm Acclaro Growth Partners. Study development and oversight was a collaborative effort conducted by the following organizations:

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We also want to especially acknowledge the many seniors housing professionals who took the time to complete the Overview surveys and made this report possible. We hope the information provided in this report can serve as a catalyst for educating all those who care about making assisted living the best it can be for America's seniors.

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# Methodology and Data Analysis

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All five organizations distributed surveys to assisted living and dementia care communities throughout the United States in late 2008 and early 2009.

Executive Directors, Administrators, or other Operations Executives were asked to complete an Operations Survey for each of their communities open for 12 months or more at the time of the survey. Those who completed the surveys have worked an average of six years in the communities, are familiar with the dynamics of the property and the condition of the residents, and also demonstrate managerial stability.

Directors of Nursing, Directors of Health and Wellness, and other persons in charge of resident care were asked to complete a Resident Survey for four randomly selected residents at each community. Instructions were given to randomly select these residents as follows: 1) alphabetize a resident list; 2) divide the list into four parts; and 3) select the last person in each group.

Not all properties submitted both the operations and resident surveys as instructed. All completed surveys were carefully reviewed for accuracy and, when appropriate, follow-up with respondents was made to clarify apparent ambiguities and remove illogical responses. All data presented in this report originated from the 2009 Overview of Assisted Living Surveys, Operations and Residents, and are subject to sampling and non-sampling errors, such as differences in the interpretation of questions by respondents. Findings from our analysis are presented in several different types of measurements or statistics: counts, sums, percentiles, medians, and means. Counts are the number of responses to a particular question, while sums aggregate the numerical responses. Means are simple arithmetic averages. Percentile data are presented as well, including: the 25th and 75th percentiles (the lower and upper quartiles), and the 50th percentile (medians). Medians are often preferred over means or averages, which can be skewed by a few extremely high or low response values.

Quartiles are calculated by dividing a sample into four equal parts. When the responses are arranged sequentially, the lower quartile value is the value separating the lowest 25 percent from the rest of the sample. The median value is the middle value (or 50th percentile) and the upper quartile value defines the boundary of the upper 25 percent of the responses.

Exhibits in which medians are presented are usually accompanied by quartile statistics. Together with the medians, quartiles provide a representative range of responses rather than a single data point. Means are presented either when a sample is relatively uniform, or in select cases when it is not, along with median data in order to identify the effects of outlier responses. Unless noted, percentages are for those who responded.

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