

The wellness audit: a useful tool for active-aging communities



Read on to learn where, why and when a wellness audit is advisable

by John Rude, MS

Are any of the following scenarios true for you?

- You hear a lot of discussion at conferences about the importance of a wellness program, but you're not certain you have the right mix of resources or the financial ability to start a program.
- You have a wellness program. You believe it's a good beginning, but

you're not confident how to ramp it up or what the benchmarks should be to measure success.

- You've been using multipurpose spaces for your wellness programming for several years. However, you now want to develop a state-of-the-art facility, but sense the architect you have used for your housing projects may not have the expertise to design an age-appropriate wellness center.

These scenarios often race through the minds of executives who are trying to stay on the cutting edge and keep their retirement communities competitive.

You, like them, may wonder how to get a sense of quality or success in an industry still in the early stages of wellness growth and development. Or, if you don't have facilities or a program, how do you become assured your vision and plans are appropriate and your investment in wellness will be sustained for the long term?

Some providers will attempt to figure things out by themselves or organize a task force to investigate these issues. Another approach is to seek an objective opinion from a consultant with a proven track record working with a variety of

wellness-related projects. This consultant can quickly evaluate current conditions and operations, plus assess proposed plans and offer insights and recommendations based on years of experience. In my firm, we call this process a wellness audit, and this article will explore its basic components.

Wellness audit defined

A wellness audit is a situational analysis of the physical, human, programmatic and financial resources related to a wellness initiative. The study should also include the competitive marketplace and the long-term mission and/or vision of the organization. A wellness audit is very similar to a SWOT analysis, which assesses the strengths, weaknesses, opportunities and threats of an organization or some initiative—in this case, within the context of a wellness program or plan of action.

Unfortunately, the concept of wellness has yet to be fully embraced by trade associations directly connected to the retirement housing industry. (The International Council on Active Aging® is the exception.) Why? The retirement housing industry often faces two significant barriers:

- It grew out of the medical model and continues to be strongly influenced by disease management.
- The healthcare delivery system in the United States is managed by stringent state and federal regulations that keep providers focused on healthcare, not prevention.

Thus, there are few, if any, benchmarks or protocols for providers to follow. One would think that with all the aging research available today, both healthcare systems and healthcare providers would have this knowledge well in hand.

Bottom line, retirement housing organizations have few choices. They can hire a consultant, attempt to perfect something on their own, or go outside the industry and observe other applications, such as athletic clubs, YMCAs/JCCs, hospital wellness centers, and the like.

The purpose of a wellness audit

Why undertake a wellness audit? What purpose does it serve? The key factors are threefold:

- to inform and educate all stakeholders how a wellness initiative will impact the success of an organization
- to get uniform buy-in from all stakeholders
- to survey the current state of the existing conditions/programs

If an organization currently has a program, this process will help discover how its wellness initiative compares with similar organizations, either local or national. It's difficult to be objective about one's own program—self-evaluation generally doesn't provide objective and critical insights. For example, an organization may find itself in a community setting where wellness standards (i.e., leadership, facilities, participation levels, functional outcomes, etc.) aren't very high, and therefore, the organization may believe it is on the leading edge. However, comparing the organization's program to state or national standards, it may be below par. Providers can easily get stuck in the maxim, "They don't know what they don't know."

When to do a wellness audit

The most advantageous time to conduct a wellness audit is prior to starting a program—or on the front end of an expanding wellness initiative. Examples include:

- when an organization is moving away from an activity model to a professional wellness model
- when an organization is embarking on a multimillion-dollar expansion and wants to include a state-of-the-art wellness center
- when an organization is planning a capital campaign that includes a wellness component
- when an existing program has low participation and is not growing
- when there is no system in place to measure objective and measurable outcomes

- when an organization is losing market share and wants to be more competitive by adding value to its product
- when an organization desires to "raise the bar" on its wellness initiative
- when an organization is going through a turnover in program leadership
- when an organization has recently purchased, or contracted to manage, a new or existing retirement community

Who to involve in a wellness audit, and why

There are several groups and individuals who need to be involved in the audit process. First and foremost is the board of trustees or owners (if it is a for-profit business). They are the ones who drive the mission, and they are generally the ones who think long term and create a vision for the future. Another key group is the management team, which often consists of all the department heads along with the executive director. This group sets the tone for the entire organization, has the pulse of the operation, and is the key group of constituents needed to get buy-in before something is initiated.

Group research can be cumbersome, so it is important to obtain input from individuals who represent different disciplines throughout the campus. Therefore, the study must shift away from groups toward individuals. This focus will add significant detail and richness to the overall audit.

The strategy here is to address all the varying disciplines that reflect the six dimensions of wellness—namely, physical, emotional, social, spiritual, intellectual and vocational wellness. In a typical continuing care retirement community (CCRC), the list may include the following, among others:

- executive director
- marketing director
- activity director
- social services
- director of nursing
- director of physical therapy
- spiritual director

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- food services director
- building and grounds director

These individuals each have some stake in the health and well-being of the organization, and each of the disciplines they represent will add dimension to the study. Further, just the process of the wellness audit itself should encourage the participants to see how vital their roles may be, even though they are not directly involved in the wellness department.

Beyond personnel, it is vital to communicate with the consumers—in a retirement community, that is the residents. Most retirement communities have a residents' council. This group should be interviewed as they bring a broad perspective, drawing from all the committees and programs they represent. The residents' council (or another group of residents) may serve as a focus group, and this "interface" with the group will help provide information about current and past lifestyle. A note of caution: Residents also "don't know what they don't know," so be careful not to survey items they have never experienced. Most older adults did not grow up with fitness or wellness and may "push back" a wellness initiative because they don't fully understand the value. Consumers must experience a program first for any survey to get valid feedback.

If the organization is on the threshold of a new wellness center development, the wellness audit will want specific information from the chosen architect. Experience indicates, however, that while many architects have expertise with housing, few have experience with effective wellness center design. Keep in mind there are no "do-overs" following a completed building, whereas with personnel or programs, there is opportunity for change.

In addition, many retirement communities produce a master plan, which is a comprehensive study projecting growth

and development of a campus five to 20 years out. This plan, if current, should be studied and integrated into the wellness audit, as an organization may need to address critical elements (i.e., timing, financing, market conditions, design issues, etc.).

What to consider in a wellness audit

Generally, the wellness audit looks for strengths, weaknesses, opportunities and threats compared with industry-wide and local trends in the market—all of which drives the scope and nature of "when" and "where" to make minor modifications or major interventions.

Although it is easier to observe physical items such as the site plan, program space and equipment, a more discerning consideration is what board and management are "thinking" and how effectively they work together. For example:

- What are their values? What is their vision?
- How eager are they to be a leader in the industry?
- What is their pain threshold for change?
- Are they stuck in the disease management model?
- Will they consider a new paradigm?
- Are they willing to take a risk if their competitors haven't?
- Are they self-motivated?
- Do staff members work well as a team?
- Will the board/owners endorse what staff proposes?

Additional items considered in the wellness audit consist of responses from all the interviews; the philosophy and/or mission of the organization; the short- and long-term vision; and the relevancy to the current state of a wellness program.

What to do with the results

A lot of data is gathered when an organization goes through a wellness audit—

generally enough to fill a 30–40 page document. This document, called an executive summary or report, is broken down into several subsets listing observations, recommendations, and industry insights for each topic assessed. This study is then distributed to all stakeholders for review. Clearly, it is up to the organization to choose whether or not to move forward with some or all of the recommendations. Many of the considerations include prioritizing the recommendations, timing, whether or not to "staircase" the project over time, and whether or not to do the implementation independently or contract with a consultant.

In a nonprofit setting, the executive director will generally bring the final report to the attention of the board for review. At times board members and/or staff may desire information or advice, or both, before making a decision about recommendations.

A wellness audit can prove to be a powerful experience for any organization—and a useful tool. By being actively engaged in the process and capturing clear and accurate information, stakeholders buy into the concepts, principles and recommendations. As a result, a critical mass of stakeholders becomes part of the vision that supports the proposed outcomes for the community. ☞

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