

INDEPENDENT LIVING RETIREMENT FACILITIES:
THE EFFECT OF PUSH AND PULL FACTORS
ON RESIDENTIAL SATISFACTION

by

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(ABSTRACT)

Wants and needs for housing change over time as events occur (such as marriage, raising families, career promotions) that cause adults to re-examine their living environments. As people age, this reassessment continues, and alternative housing options may be considered. One housing option that is available to older adults is an independent living retirement facility. The purpose of this study was to examine the relationship between motivations for moving to independent living retirement facilities and subsequent satisfaction with that environment.

The sample for this study consisted of residents of townhomes leased to older adults for age-segregated living in a planned retirement community, with health care amenities on site. The research was conducted in two phases: focus groups were convened with residents of this facility, and a self-administered instrument was developed and sent to all 94 residents of the townhomes. The instrument measured the influences on moving and

residential satisfaction on a four-point Likert scale. The data were analyzed using descriptive statistics, correlation analysis, and multiple regression.

A total of 79 usable responses were obtained from the initial mailing and one follow-up postcard, for a response rate of 84%. There were twice as many women as men in the sample group, and it was evenly divided between married-couple and widowed households. The average age for the residents was 78 years. They were well-educated older adults, and the majority had prior occupations in professional and managerial sectors.

The influence on moving that received the highest number of positive responses (>2.5 on a Likert-type scale) was to maintain independence, followed by being free of home maintenance, and the knowledge that health care needs would be taken care of in the future. The residents were satisfied with their overall housing and neighborhood environment, especially with their neighborhood. They were less satisfied with maintenance of the facility and with the management.

Two influences on moving emerged as having a positive relationship with residential satisfaction: preference for a homogeneous (age-segregated) community, and a desire to move closer to friends and family. The variables that significantly predicted residential satisfaction were (a) a preference for a homogeneous community, (b) a desire to move closer to friends and family, and (c) the pull of the macroenvironment (i.e., features available, or inherent, in the nearby vicinity of the retirement community that act as pulls, such as mountains, a nearby university, or a rural area), which had an inverse relationship to residential satisfaction.

Four individual components of residential satisfaction (housing, neighborhood, maintenance, and management) were analyzed

for predictors of satisfaction. One variable predicted housing satisfaction (homogeneous community), none predicted neighborhood satisfaction, five predicted satisfaction with maintenance (environmental concerns, homogeneous community, macroenvironment, future support, and family and friends), and three predicted satisfaction with management (homogeneous community, family and friends, and macroenvironment). The latter three predictors were the same predictors of residential satisfaction, emphasizing a strong relationship between management and residential satisfaction.

Dedication

In loving memory of David Reynolds, who I know would have encouraged me in this endeavor. To my three children, Seleta, David Lee, and Hayley, who have supported me and have helped to give balance to my life during this academic journey.

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Chapter I

Introduction

Various events occur throughout people's early adult lives-- marriage, having children, career promotion--that change the way people look at their environments. As people age, these life events continue to occur as children leave home, workers retire, and various personal needs or wants cause people to reassess their housing environments. Houses that are perceived as being too big and too physically demanding to maintain often "push" older adults to consider other housing options. Changing needs as well as changing preferences combine to impact upon older adults' decisions to move. Desires for different lifestyles may be augmented by factors such as "pulls" of the natural environment, location of kin and friendship networks, or retirement site amenities to have an effect upon moving decisions for older adults.

Although older adults have strong attachments to home and neighborhood, approximately 5% of Americans over 65 years of age move each year (Biggar, 1980b). In recent census data, the largest number of people reported moving for housing-related reasons, such as wanting a better home, lower maintenance, or lower cost, closely followed by "other, family/person related" reasons, and simply "other" (U.S. Bureau of the Census, 1991). It is not possible to determine from census data alone the interaction of these reasons, nor what "other" might encompass. Do adults move to lower their maintenance, to decrease their housing costs, to be closer to family, to seek preferred life style changes, or for a combination of these reasons, plus many others?

Several researchers have attempted to categorize reasons for moving among older adults. Wiseman (1980) suggested that moves are

made for reasons of amenities, assistance, and return migration. The primary triggering mechanism for amenity moves is a desire for a change in lifestyle. Assistance moves are frequently to be nearer to kin. Return migration is for those seeking both assistance and amenities.

Litwak and Longino (1987) placed the moving patterns of older adults in a developmental perspective, based on life course patterning as people age. These researchers looked at migration patterns in census data from four northeastern states ($N = 258,600$), and living arrangements with family at the migration destination. They determined that older adults who move do so in three different stages, related to retirement and health changes as people age. The first move is made when retirees are relatively healthy and move for the sake of amenities and lifestyle considerations. The second move occurs when older people develop chronic disabilities and move closer to kinship support networks. The third move occurs when there are requirements for care that informal support networks can no longer provide.

Movers in the first move tend to be younger, healthier, and wealthier than movers in the second and third moves (Litwak & Longino, 1987). For these first movers, where crises are not a motivation, the availability of support networks is not as important, and financial resources are not a constraint, the menu of housing options is a primary consideration. One housing option that is gaining more interest and acceptance is housing in age-segregated communities. In 1986, Polich, Parker, and Iversen found as many as 24% of community residents in Minnesota ($N = 809$) interested in retirement-age housing. In a recent national sample of older adults sponsored by the American Association of Retired Persons (AARP, 1996), 53% of respondents ($N = 1,300$) stated they

would consider moving to specially designed buildings for older adults. In 1992, 6% of America's adults over 55 ($N = 1,500$) actually lived in retirement housing (AARP, 1993). Four years later, 10% reported living in age-segregated communities (AARP, 1996). (The designation of "retirement housing" used in the 1992 survey was changed to "age-segregated communities" in the 1996 survey.)

The term "retirement community" (also referred to as "senior housing") has been defined differently by researchers over time. Nearly 40 years ago, Webber and Osterbind (1961) classified retirement housing by the degree to which it involved segregate (independent), congregate (with communal dining), or institutional living. Heintz (1976) described retirement communities as planned, low-density, age-restricted developments, constructed by private capital, and offering extensive recreational services and relatively low-cost housing for purchase. Longino (1982) classified these facilities as either subsidized or nonsubsidized, depending upon developers' use of federal funding to reduce rents. Marans, Hunt and Vakalo (1984) suggested perhaps the most embracing concepts at the time: aggregations of housing units, intentionally planned, for residents over 50 years of age, healthy, and retired. Increasingly, however, retirement communities are including units for residents needing health-related services, thus further complicating attempts to define this housing option.

Retirement facilities today address a wide variety of needs and wants of older adults. Perhaps the most encompassing definition of a retirement community is simply planned, age-segregated housing for older adults. This housing can be apartment or condominium-type housing built solely for independent older adults; congregate housing, which includes dining

facilities; assisted living facilities, which typically include both dining and some nursing services; and continuous care retirement communities (CCRCs) which generally require substantial up-front entrance fees and provide separate independent, assisted, and skilled nursing units on site, usually for the lifetime of residents. Development of each of these communities can be by nonprofit or for-profit organizations, and can range from federally assisted housing for low-income renters to private pay residents in affluent communities.

Developers who limit residents to older adults no longer tied to labor markets are able to capitalize on features designed within their retirement communities as well as features in the surrounding vicinity (macroenvironment) to attract retirees. Pleasant climates or nearby lakes or mountains can act as pulls to potential movers who are seeking recreational amenities. On-site recreational amenities, such as golf courses and tennis courts, or health care facilities that can address future health concerns, offer strong pulls to older adults as they age.

Very little is known about the reasons middle- to upper-income adults, whose financial resources allow them freedom in choice of housing, choose this nontraditional type of housing; and, as importantly, how well retirement facilities are meeting the expectations older adults have when they move. Many residents of these facilities move from traditional single-family homes in the community. Whereas many of these residents are "pulled" to retirement communities by decreased maintenance demands, this means that managers now control the upkeep of the residence, set policies and rules, and determine monthly maintenance fees. How important is management to these movers, and what qualities do they value in management? If they sought decreased maintenance,

does relinquishing control to someone else bring tradeoffs that are a source of dissatisfaction?

It is important to recognize that, although studies of older people frequently consist of sample groups based on age alone, older people are not a homogeneous group. Rather, they are as diverse in their needs and preferences as they were as younger people. Housing should reflect these varying interests, preferences, and needs. Exploring a housing option, reasons for this choice, and satisfaction with the new environment offer insights into the varied ways that people adapt to the changing perspectives and demands of aging.

Justification of the Study

People over 65 years of age today make up almost 13% of the population, or approximately 32 million Americans. Changes over time cause these older adults to reassess their housing situations. One housing option that these current older consumers have chosen is residence in planned, age-segregated communities. Research is necessary to determine how this housing fits the needs and wants of these current consumers.

The current cohort of adults over 65 are the parents and grandparents of the baby boom generation. By 2025, as the baby boom generation ages, the proportion of people over 65 is expected to reach 20%, or 60 million older adults (Morrison, 1990). Housing decisions made by the parents of this baby boom cohort may be influential in the decision making of this younger cohort as it ages. Research is needed to examine the appropriateness of this housing option in order to assist in the planning and development of retirement communities in the future.

Statement of the Problem

One of the big problems in looking at senior housing today is that it has no clear definition: senior housing includes housing

for active retirees as well as for more functionally fragile retirees. Consequently, the term "senior housing" is confusing to consumers, and has made research into mobility decisions difficult because of the diversity of relocation motivations when the criterion is simply age. Research studies have focused primarily on large national databases which combine all moves of older adults, regardless of destinations or outcomes. These studies address issues such as metropolitan and nonmetropolitan migration, (Longino, Wiseman, Biggar, & Flynn, 1984), county patterns of migration (Bohland & Treps, 1982), Sunbelt migration (Biggar, 1980a), and return migration (Serow & Charity, 1988). Although these studies offer insight into migration, they do not attempt to examine specific housing decisions made or satisfaction with these choices.

The Bureau of Census, in its Annual Housing Survey (AHS), does ask movers to compare present homes and neighborhoods with previous ones (better, worse, or about the same). However, this survey, which has followed a representative national sample of housing units since 1973, follows units, not people. Thus, there is no attempt to relate individual reasons for moves and subsequent satisfaction.

The complexity of locating recent movers in communities makes follow-up studies difficult. Locating residents of retirement housing is simpler, however, studies evaluating residential satisfaction have many shortcomings in understanding middle- to upper-income movers. The majority of data describing the residential satisfaction of retirement housing residents have come primarily from residents of lower-income publicly assisted housing (Carp, 1966; Francescato, Weidemann, Anderson, & Chenoweth, 1979; Johnson, Lovingood, & Goss, 1993; Lawton, 1974). Available research on higher-income groups living in age-segregated

communities frequently has combined different types of housing in one study, making meaningful interpretations of variables difficult. The focus of these studies has generally been moving decisions or features that current residents like. Studies that involve both moving decisions and consequent residential satisfaction with those decisions are rare.

As Golant (1991) noted, the reasons that motivate older people to move to a facility should largely insure that its social and physical qualities will match or fit their needs and wants. Thus, both looking at motives for moving, as well as factors that have an effect upon satisfaction with the current environment, are necessary in understanding residents' satisfaction. Have these movers found what they were seeking? If they are not entirely satisfied with some areas, understanding why they moved may contribute to an understanding of some of the reasons why they nonetheless stay, and what factors influence a fit with independent living facilities.

Significance of the Study

Although retirement communities are not a new phenomenon in this country, the retirement industry today is only about 15 years old (Goodman & Smith, 1992). The rush of new developers in the 1980s to capitalize on the growth and wealth of today's older population has led to the treatment of seniors as a homogeneous group. However, important distinctions exist among older adults based on age and health of movers, as well as socio-economic differences and lifestyles preferred. As Shashaty (1991) pointed out in marketing to older adults, builders need to be aware that these purchasers are buying an experience, not a piece of real estate. Builders must market a lifestyle that is appropriate and desirable for a specific target market in order to sell to consumers and retain satisfied residents.

Consumers, too, need a clearer picture of the appeal and drawbacks of these age-segregated communities. Many believe that these facilities are primarily for people who do not have friends and family close, and who are, therefore, seeking companionship. Some believe the similarity of interests, needs, and experiences is what draws people to these facilities. Sherman (1971) surveyed a group of older community residents ($N = 600$) in California and identified some of the perceived disadvantages of retirement facilities: (a) not enough privacy, (b) boring, (c) too much regimentation, (d) too expensive, and (e) feelings of confinement. The diversity of services offered at retirement facilities can add to consumers' confusion about what living at these facilities is like. Consumers need information from residents themselves to help identify misconceptions and realities of these environments.

People who manage the day-to-day operations of these facilities, including boards of directors, need to be aware of factors that influence residents' satisfaction. Using sample groups from on-going facilities, and giving feedback to management personnel, may contribute to improvements in residents' living environments.

Purpose of the Study

The purpose of the study was to examine the relationship between motivations for moving to independent living retirement facilities and subsequent satisfaction with that environment.

Objectives of the Study

The objectives of the study were to: (a) describe why people move to independent living retirement facilities, (b) describe residents' satisfaction with their living environments, and (c) examine the relationship between why people move to independent living environments and how satisfied they are with their new environments.

Hypotheses

Based on the review of literature, the following hypotheses were tested:

1. Environmental concerns are positively related to residential satisfaction in independent living retirement units.

2. Preference for homogeneous communities is positively related to residential satisfaction in independent living retirement units.

3. Preference for change in lifestyle is positively related to residential satisfaction in independent living retirement units.

4. Preference for future support is positively related to residential satisfaction in independent living retirement units.

5. Preference for a change in neighborhood is positively related to residential satisfaction in independent living retirement units.

6. Preference for features in the macroenvironment is positively related to residential satisfaction in independent living retirement units.

7. Preference to live near family and friend networks is positively related to residential satisfaction in independent living retirement units.

In addition to the hypotheses tested, the following research question was addressed: What, if any, influences upon moving predict residential satisfaction?

Definitions

Independent living retirement facility - Planned housing for older adults who, upon entrance, are generally able to perform activities of daily living (ADLs) and instrumental activities of daily living (IADLs) without assistance. ADLs include bathing, dressing, transferring, toileting, eating, and walking; IADLs

include using the telephone, shopping for personal items, managing transportation in the community, managing money, doing light housework, and preparing meals (Golant, 1992).

Homogeneous community - A supportive community of people living in close proximity who are of a similar age cohort and socio-economic status.

Environmental concerns - Concerns about the maintenance, size, and floor plan of one's living environment.

Macroenvironment - Features available, or inherent, in the nearby vicinity of a retirement community, such as mountains, a university, or a rural area.

Limitations

This study represents residents of independent living facilities only and was limited to one complex in a rural environment in Virginia. Therefore, generalizations should not be made to the general population of older adults living in independent living facilities.

Delimitations

The housing option explored in this study was limited to a single, non-subsidized townhome complex leased to older adults for age-segregated, independent living, with entrance fees required, and an assisted living facility (with dining and limited nursing services) on site.

Summary

Living in age-segregated communities is a housing option for current and future cohorts of older Americans. Understanding why people seek out these facilities, as well as their satisfaction with them, can be of benefit to consumers and developers and can help in understanding changing perspectives and demands of older adults.

Chapter II

Review of Literature

The purpose of this chapter is to develop a theory and conceptual model for examining the relationship between push and pull factors of moving to a retirement facility and subsequent residential satisfaction. Literature relevant to selected influences on moving contained in the model will be reviewed, and components of residential satisfaction will be examined.

Theory

Understanding the effects of environmental settings on older people has been a subject of research for many years. Person-environment interaction can be traced to the work of Lewin (1935, 1951), who argued that behavior can be viewed generally as a function of the interaction between people and their environment, and to Murray's (1938) concept of an individual's need to maintain equilibrium with his or her environment.

Building upon the two issues of behavior and equilibrium, Lawton and Nahemow (1973) described an environmental-press theory that states that a person's response to a stimuli possesses a motivating quality to activate a cognate individual need. The response elicited by various presses (such as stairways, or doorways that are too narrow for wheelchairs) is determined only by the competence of the individual. Competence takes in biological health, sensory-perceptual capacity, motor skills, cognitive capacity, and ego strength. An assumption made in the theory is that at some point as one ages, a person's ability to deal with a situation diminishes, or the challenges in the

situation increase, and when that threshold is reached, a change in living arrangements may occur.

One of the strengths of the environmental-press theory is that it addresses more than one area of competence, so that in assessing the impact of environment, one can investigate both cognitive and physiological aspects of aging, as well as interpersonal skills and needs. A weakness of the theory, however, is that measurement and operationalization of these many variables have presented many methodological challenges, and optimal ranges of stimulation and adaptation have not been clearly defined. Another weakness of the theory is that it fails to address personal resources and preferences of individuals, and the active role that individuals assume. Although important in establishing a link between competencies of the individual and presses of the environment, the environmental-press theory does not include the economic resources available that influence choices, or preferences for lifestyle changes, or the pulls of various housing options.

A model that establishes a foundation to examine both individual resources and preferences, as well pushes and pulls of environments, is Wiseman's (1980) model of elderly migration (see Figure 1). This model incorporates environmental incongruence, age-related losses and critical events, and changes in life cycle stage and preferred lifestyle as triggering mechanisms that instigate the moving decision. The model includes push factors, such as independence loss and environmental stress, and pull factors of a new environment, such as environmental amenities and relocated friend or kinship networks. Indigenous factors such as personal resources, community ties, and former migration experience, and exogenous factors such as cost of living and housing market, are also included in this model.

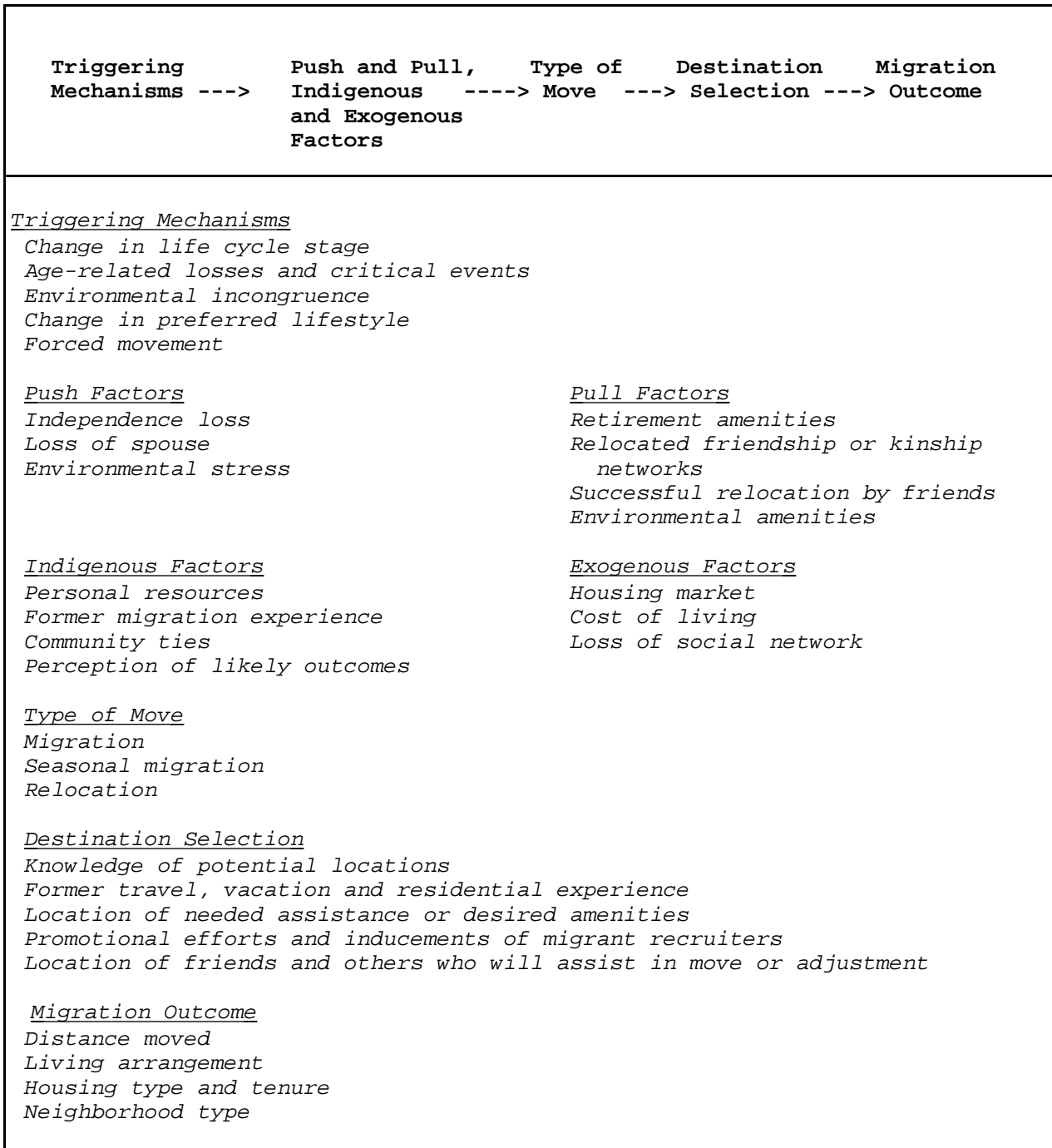


Figure 1. Adaptation of Wiseman Model of Migration (see Wiseman, R.F. 1980. Why older people move: Theoretical issues. Research on Aging, 1, 141-154.)

The Wiseman model typifies a more proactive approach to environment and person interaction than the environmental press theory. A model that also exemplifies the concept of proactive behavior is the congruence model of person-environment fit (Kahana, 1982). Kahana hypothesizes in this model that individuals with certain types of needs are most likely to seek out and be found in environments that are congruent with their needs. Goodness of fit is seen as antecedent to satisfaction rather than synonymous with it. If individual needs and wants are matched by the characteristics of the setting, this should lead to a sense of well being and satisfaction. Kahana noted that congruence between individual needs and environmental characteristics will be most important when environmental or individual options are limited. She identified three factors that lead to limitation of such options: (a) restrictiveness in environmental characteristics (such as in an institution); (b) limited degrees of individual freedom (such as declines in health), and (c) internal perception of limited degrees of freedom (such as perception of loss of control to external forces in one's environment). Although researchers have used selected factors of the Kahana model and the Wiseman model in their research, neither model has been empirically tested.

Model of Moves to Independent Retirement Housing

Drawing from the above theories regarding the competence of individuals and presses of the environment, pushes and pulls of environments, and congruence of person and environment, a revised model of the Wiseman model is proposed (Figure 2). This conceptual model of residential evaluation examines the pushes and pulls of the environment as contributing factors to residents' satisfaction with their chosen environment.

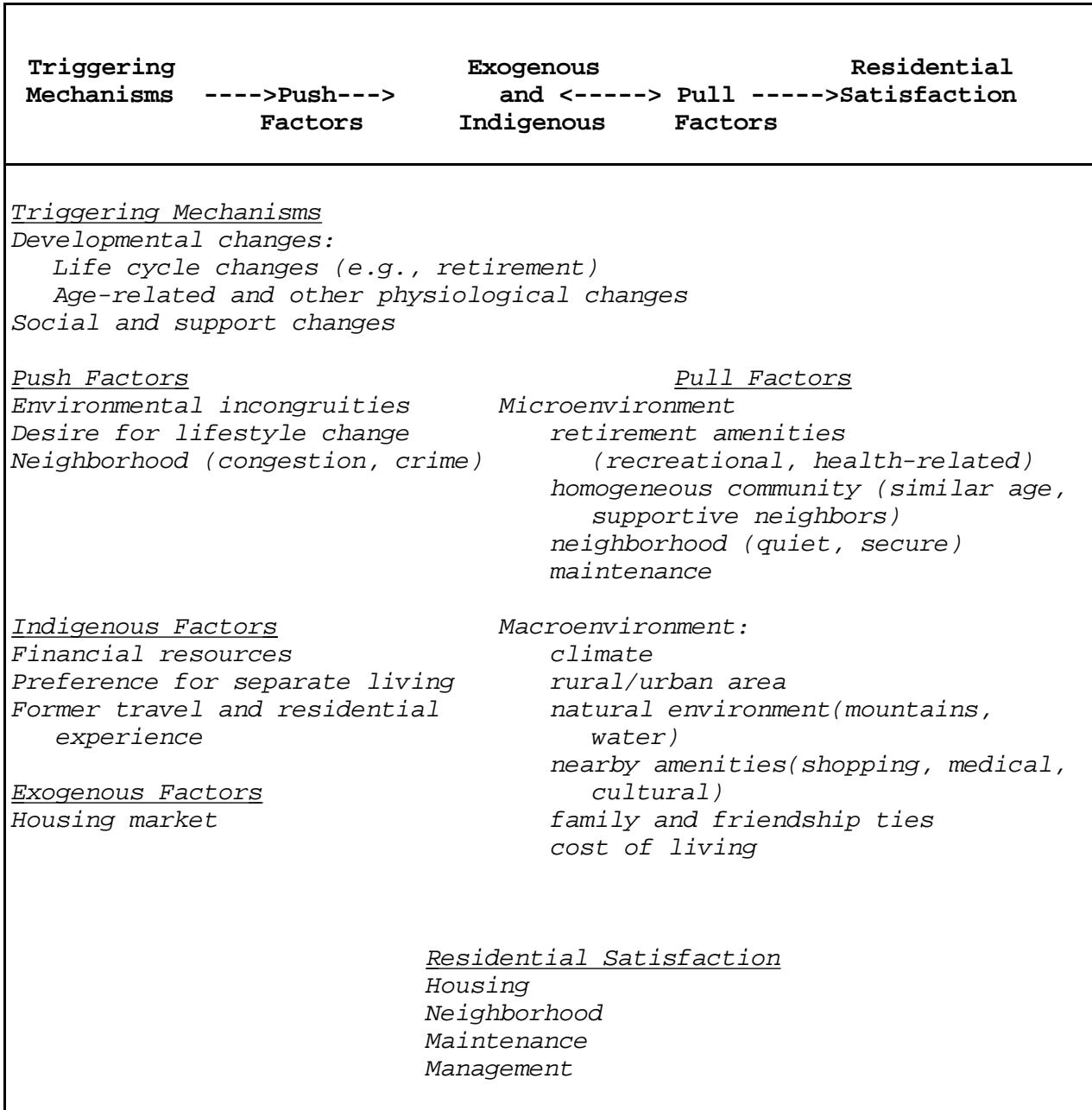


Figure 2. Conceptual Model of Push and Pull Factors and Residential Satisfaction

An attempt was made both to simplify the concepts in the model, as well as to make it specific for moves to independent living facilities. For example, Wiseman defined "triggering mechanisms" as factors that lead one to consider residential change. As such, many of these factors overlap or are interchangeable with "push" factors (e.g., "critical events" and "loss of spouse," "independence loss" and "age-related losses"). In order to simplify the model, "triggering mechanisms" was narrowed to developmental changes (e.g., retirement, physiological changes), and social and support changes (e.g., loss of spouse and other support networks.). "Forced movement" was eliminated because movements to independent units are voluntary. "Type of move" was eliminated because this is not a model for migration (inter- or intra-state mobility), rather, it is a model for moves to independent living facilities, regardless of distance. The category, "migration outcome" was eliminated because the outcome is pre-determined as an independent living facility.

Several researchers have examined the placement of the destination selection in the Wiseman model of migration. Gober and Zonn (1983), using data from personal interviews conducted using a random sample of migrants ($N = 92$) to Sun City, Arizona (an amenity-rich environment designed for active older couples), found that migrants had contact with their destination site long before their actual move. Cuba (1991) arranged structured interviews of 163 randomly-selected respondents from two Cape Cod communities. Cuba determined that the decision to move and the selection of a destination may be a one-step process, rather than the two-step model that Wiseman posits. Findings that individuals often vacation repeatedly at sites that eventually become their retirement destinations, and a limited scope of the destination

search at the time of moving, led Cuba to conclude that the migration decision is a single-stage process for many.

Haas and Serow (1993) developed a heuristic model of retirement migration using telephone survey data from 586 retirement migrants to western North Carolina. In examining the decision-making process, they, too, concluded that moving and location decisions probably occur in tandem as overlapping decisions. Thus, in the revised model, relevant selection factors were included as either push or pull factors.

The revised conceptual model contains (a) triggering mechanisms related to developmental, as well as social and support, changes; (b) push factors related to environmental incongruities, desires for lifestyle and neighborhood changes; (c) indigenous factors, related to financial resources, living preferences, and former travel or residential experience; (d) exogenous factors related to the housing market; (e) pull factors related to the microenvironment and macroenvironment; and (f) components of residential satisfaction (housing, neighborhood, maintenance, and management).

The revised model was used as a guide in selecting concepts to evaluate in this study; no attempt was made to include every factor in this single study. Some factors were outside the bounds of this study. (For example, no attempt was made to investigate housing markets, listed as an exogenous factor.) Some issues are inherent in the sample group selected (e.g., the choice of the facility under study implied a certain socio-economic group as participants; the amenities offered were only health-related). And, some areas in the model overlap, such as a push to leave burdensome maintenance and a pull to have maintenance provided, or a push to leave a deteriorating neighborhood as well as a pull to

a quieter, safer neighborhood. Thus, the following discussion, although using the revised model as a guide, combines, as well as excludes, factors from the model. The following sections, therefore, will contain reviews of the literature related to selected concepts presented in the conceptual model above.

Triggering Mechanisms

People incur various physiological changes as they age that can influence their interaction with the environment. Sensory changes in hearing and vision, combined with age-related changes in the musculo-skeletal and respiratory systems, can make everyday tasks more challenging. Chronic conditions, such as arthritis and cardiovascular diseases, can further complicate one's ability to manage easily in home environments (Cavanaugh, 1993). For most older adults, this simply means slowing down--taking longer to do tasks that require strength and endurance. However, because of these physiological losses, older adults may begin to perceive their environment differently. Stairs that were once easy to climb now may become arduous. Landscaping that was once easy to care for may seem too physically strenuous to maintain.

Along with physiological changes, life cycle changes may also be occurring. The common conception most people have is to work at a career for a certain part of their lives, and then retire from employment. Atchley (1982) found that following retirement, many people go through a euphoric period in which they try to do all the things they did not have time for before. In his longitudinal study of 168 retired people, Atchley found activity levels went up following retirement, then went down temporarily, but returned to preretirement levels after three years of retirement. Activity levels may be channeled into different lifestyles, such as more leisure pursuits or volunteering efforts. Atchley speculated that a period of reorientation occurs for many

older people, in which retirement experiences are used to develop a more realistic view of alternatives within particular sets of resources.

Loss of social and support networks may also spur investigation of alternatives, such as changes in living situations. Retiring from the work force means decreased social contact with former workers. For some older people, loss of peer groups may foster a sense of social isolation and loss of support, especially if other kinship ties are not nearby. Beland (1984) surveyed persons over 65 ($N = 990$) living in three communities concerning social interaction and found that the frequency of formal and informal social relations was related to an increase in the desire for different housing. Litwak and Longino (1987), in exploring developmental transitions such as retirement, linked loss of support networks with migration.

At retirement, because of Social Security, accumulated investments, or both, many older people have an assured income that does not depend upon residence within a job market, or the continuance of unpaid family labor which concerned earlier generations. Thus, the necessity of remaining in the same home or same area is no longer salient, and retirement is often associated with migration among retirees (Biggar, 1980a; Bultena & Wood, 1969). Because income is now fixed, however, the need to cut living costs and adapt housing to family size and responsibilities is a stronger concern.

Places of high employment are seldom places where living costs are low or where life is adapted to leisure pursuits (Lee, 1980). The consideration of an area with lower living costs and more available environments for leisure pursuits, therefore, is a factor for retirees looking ahead to retirement years. Steinnes and Hogan (1992) examined aggregate 1980 census data of interstate

migration flows to Arizona. They analyzed housing prices and income levels in the states of origin compared to those in Arizona and concluded that retirees move in order to lower their cost-of-living in much the same way that younger migrants move to raise their income. These researchers contended that elderly household members migrate to consume new goods (residence and community) which will give them higher utility than the old goods (old residence and community).

Push and Pull Factors

Rural communities. Beale (1988), in examining 1980 census data, noted a sizable shift in population towards small towns in the 1970s. In a recent national study of older adults ($N = 1,300$), 60% reported that they would prefer to live in the country or a small town (AARP, 1996). Besides lower costs of living, other factors, such as less congestion and pollution contribute to the appeal of rural environments. Maloutu and Brandt (1992), in a mail survey of preferences of pre-retirees in four states conducted by a Western Regional Agricultural Experiment Station Committee ($N = 702$), found the community characteristics considered to be most important in a rural area or small town were low crime rates and low costs of living.

Atchley (1975) may have tapped another reason for the combined appeal of retirement communities and rural communities. He described the rural ideals that are the appeal of rural environments--those that emphasize personalized interaction, informality, simplicity, slow social change, and little social differentiation. Similar ideals are often fostered in retirement communities; thus, for the cohort of older Americans who grew up before the tremendous growth in metropolitan areas, rural environments may have a special appeal.

Family and friendship pulls. Family and friendship ties are an important issue in residential preference, but their impact upon reasons for moving has been the basis of somewhat conflicting findings. In a statewide study exploring family life-cycle and residential preferences among multi-age residents in Pennsylvania ($N = 1,096$), factors such as housing appearance, physical qualities, health and safety features, shopping convenience, and informal contacts were examined (McAuley & Nutty, 1982). Older respondents rated informal contacts (convenience to homes of friends and relatives) as most important, while for younger age groups this category was among the least significant.

Other researchers found that the closeness of informal contacts was not an influence upon moving. Sherman (1971), in examining randomly-selected residents of six senior housing sites in California ($N = 600$), found that moving to be near family or friends was a small factor in the decision-making. Cuba (1991) found that migrants were directed to Cape Cod as a retirement destination on the basis of friendship and kinship ties only in the absence of direct contact with the destination. Having a friend or relative on the Cape prior to retiring had little effect on whether migrants considered moving some other place.

Gober and Zonn's (1983) study examining residential location of kin also seems to refute the importance of kin at the distant location. They found that almost one half of the migrants to Sun City, Arizona had at least one child at the previous community in which they lived and none of that group had, at the time of the move, a child in the Sun City area. Only 15% of respondents cited proximity to friends and relatives as a reason for choosing Sun City, in spite of the fact that almost three fourths of the

sampled households had at least one friend or relative living in Arizona at the time of their move.

Although the movers in the Gober and Zonn (1983) study placed minimal importance on kin as an aspect of place utility, over 70% of all households first heard about Sun City through friends or relatives. These researchers speculated that kin are especially important as providers of information; however, kin are relatively unimportant as an aspect of place utility. The results also suggested that friends played a significant role in the migration process, although the intensity of such associations is likely to be less than for kin. Friends can sometimes substitute for relatives by providing information or facilitating moves. In fact, friends were more important in the provision of information than relatives in the Gober and Zonn study, perhaps acting in the role of allaying the fears of potential migrants (MacDonald & MacDonald, 1964; Ritchey, 1976).

Propensity to live alone. Although the location of family and friends may have an effect upon moving decisions, the proportion of older adults moving in with children has been decreasing. Crimmins and Ingegneri (1990), gathering data from three sample surveys of over 6,000 noninstitutionalized older adults from the National Health Interview Supplement on Aging, examined changes in coresidence of parents and children. In 1962, almost one out of three older persons lived with a child. By 1975, this figure had dropped to less than one in five. This decrease in coresidence with children is consistent with findings from census data by Michael, Fuchs, and Scott (1980) of an increase in the propensity to live alone among older widows from 1950 to 1976. Further evidence of a continuing trend toward independent living arrangements was reported in two consecutive AARP surveys (1990 and 1993). Those agreeing with the statement "I

would really like to live alone" rose from 41% to 49% over the 3-year period.

Various reasons have been attributed to this increased propensity to live alone. Gibler, Lumpkin, and Moschis (1997), in surveying members age 60 and older of the Market Facts Consumer Mail Panel ($N = 2,588$), found that the main concerns older adults had about moving in with children were becoming a burden and creating conflict. Other researchers, examining income levels of widows age 65 and over from census data, have speculated that increases in living alone are the result of variables of income levels as a reflection of an economic demand for privacy or autonomy (Michael, Fuchs, & Scott, 1980). Mutchler and Burr (1991) also attributed economic resources to the decision-making process in transitions across different household arrangements. Using data from the Survey of Income and Program Participation over a 2 1/2-year period ($N = 2,451$), they found that the likelihood of forming a one-person household was elevated among those reporting a high income, as well as those reporting a rise in income.

Homogeneous communities. A retirement community is one housing option in which preference for separate living may be expressed. Unlike an age-integrated community, an age-segregated community has certain commonalities that the former community rarely provides. Hoyt (1954), in interviews with 194 older adults living in trailer parks in Florida, found that many of the factors that influenced their moves were the mutual assistance in time of illness, the better possibilities for association with others, and the desire to live in a quiet, child-free environment. Burby and Weiss (1976) conducted personal interviews to compare attitudes in two retirement communities with attitudes of older residents in planned new towns. They found that residents perceived their age-

segregated communities as quieter and safer, and residents reported more opportunity for social contact and less social isolation than conventional communities occupied by older people. Litwak (1985) speculated that people in retirement communities may seek a more shared community experience characterized by a higher degree of reciprocity, mutual aid, interdependence, and cooperation than would be expected in an age-integrated community.

Whereas there are differences in the social milieu between age-segregated and age-integrated communities, researchers report conflicting findings about the importance of age-segregation itself as a pull for retirees. In a 1996 study by the American Association of Retired Persons ($N = 1,300$), some 22% of those aged 75 to 79 stated that they would prefer a neighborhood with only people their own age. Sherman (1971), however, in examining six retirement sites ($N = 600$) in California, found that the wish to live with people in the same age group was not a factor in the decision-making process. Gober and Zonn (1983) reported that only one person in five cited age-segregation as a place characteristic in the choice process of older adults, even though the nature of retirement facilities is physical proximity to older adults and the exclusion of young persons. Those migrants living in retirement communities with close relatives nearby assigned age segregation the lowest value, while those having neither friends nor relatives in Sun City or Arizona assigned age segregation more importance. Gober and Zonn speculated that having friends or relatives in the area is an important pull and, if this is lacking, the potential of forming social ties with people in one's age group in the retirement community itself becomes more valued.

Health-related, future support. Shared community experiences encompass many commonalities for people as they age. For example, older adults' physiological declines often provide a basis for

empathetic understanding among people in a similar age cohort. Although independent living facilities attract healthy, older adults, this does not mean that these adults are without age-related losses or other chronic health conditions. Adults with such health conditions may be especially likely to be found in facilities that have on-site health facilities such as assisted living facilities or nursing centers. Are these residents more frail than other community residents, and, thus, more attracted to this type of independent living facility?

When comparing the self-reported ability of residents to perform activities of daily living, Blandford, Chappell, and Horne (1990), in a study designed to evaluate the provision of housing and supportive services to older persons in a large metropolitan area ($N = 600$), reported that both community and retirement residents had similar functional abilities. These researchers pointed out that this finding is contrary to the opinion that older people move from their houses to seniors' apartments because they are no longer able to look after themselves. However, in the same study, assessment of health based on chronic conditions and more time in sick beds, revealed that residents in senior housing settings scored higher, seeming to refute the relation of similar health in both groups. Further complicating the interpretation of findings, each of the facilities provided different levels of supportive services (ranging from no services to multi-level care), but the results of reasons for moving were combined into single percentages when presenting findings.

In a study of residents ($N = 6,500$) of seven lifecare communities, Parr, Green, and Behncke (1988) found that the two reasons noted most often by residents for having moved into these life care communities were the availability of health care and the expectation of being able to live there the rest of their lives.

Surprisingly, only 18% of respondents stated that their health limited their activities most of the time. Again, the mix of residents at life care facilities (ranging from independent living to nursing centers) makes interpretations difficult. Additionally, for those in dwellings that are more supportive, the structure and services of the facility may allow residents to navigate their environment more easily than if they lived in the community. Thus, their perception of their functional ability may be influenced by the design of the facility itself.

Longino's (1982) study seems to confirm the findings of Parr et al. (1988) in regard to health care. Slightly over one half of the 3,000 residents in the lifecare facility that Longino studied listed health needs as reasons for moving, although almost two thirds rated their health as good. Sherman (1971) found a somewhat stronger tie to declining health and moving to facilities that provided health care. Respondents in her study reported that a common motivation for moving was a declining energy level, possibly coupled with various health problems.

Other pushes and pulls. Sherman (1971) found the most frequently selected reason for moving to a retirement facility was "easy maintenance." Other important issues for the movers were the quality of the dwelling unit, nearness to facilities and services, cost, and security. Longino (1982), examined the reasons residents moved to three retirement facilities, and noted the match between individual needs and services provided. He surveyed residents of a subsidized apartment building, a community in the scenic Ozark Mountains that attracts many older adults, and a lifecare community in the Midwest. Residents were asked "How did you come to be living here?" Responses had to do with push and pull factors of the specific areas from which and to which they moved.

Residents moving to the subsidized apartments listed financial reasons and a desire to leave their old neighborhood as the main reasons for moving. Residents of lifecare communities sought shelter from future health concerns, a more manageable environment, and companionship. For the Ozark community, an unplanned retirement area, 54% selected the pull of the natural environment. The Ozark community attracted people from farther away than the other two planned communities, and they tended to be younger, married, and in better physical and financial health.

Demographics

Researchers have discovered certain characteristics about older adult movers in general: more are renters prior to moving and more have lived in their residences for shorter periods of time. Lane and Feins (1985), in examining four 2-year waves of the American Housing Survey, reported that while almost 26% of all elderly-headed households were renters, 51% of older households vacating their dwellings were renters; and of these movers, almost 50% had lived in their dwellings for 10 or fewer years. In another study, differentiating older residential movers from nonmovers in the 1984-86 National Health Interview Survey ($N = 2,950$), respondents who reported longer lengths of residency and those who owned a home were less likely to relocate (Sommers & Rowell, 1992).

Meyer and Speare (1985) attempted to differentiate types and determinants of mobility for older adults. They found that of 977 persons originally living in Rhode Island (followed over a 10- to 12-year time period), those migrating for amenities had higher incomes, more education, were younger, and more likely married than those who were more residentially stable. Those who moved in preparation for aging (i.e., to a smaller unit on one floor or to

an age-segregated complex) were similar to those moving for assistance except they were still healthy, younger, and more affluent. Compared to nonmovers, those moving in preparation for aging had been more mobile in their earlier years and more were unmarried.

Many demographic findings in retirement communities themselves are related to the environment in which the resident lives. For example, as private retirement facilities frequently require large entrance fees and monthly fees from residents, it is not surprising that residents there have more education, which is linked with higher socio-economic status. Mean years of education reported in a study of middle- to high-income residents were relatively high (14.5 years), with the majority of residents coming from professional occupations or having been managers and owners of businesses (Parr et al., 1988). Sherman (1971), too, found that those who lived in the more upscale retirement communities in her study were better educated and more likely to have worked either for themselves or in professional and managerial positions. Parr et al. also conducted market studies on prospective residents using random samples from census tracts of those 65 years of age and older. Of those expressing interest in senior housing, they found that more were from professional occupations and slightly older (69 versus 66), but there were fewer males and fewer homeowners.

Other demographic findings are more difficult to determine because of the income mix of residents, the different levels of support provided at retirement facilities, as well as the different ways of measuring health. These factors are important in looking at reasons for moving to retirement communities, however, they are often combined into a single study, making analysis difficult. For example, Blandford et al. (1990)

compared individuals in senior housing (including two subsidized and one non-subsidized setting) with a sample of community residents of the same age group on sociodemographic variables and health characteristics. These researchers found that those living in senior housing tended to be female, widowed, and had lower income. However, the relationship of lower income to residents in senior housing needs to be interpreted within the context of the sample group, as entrance to two of the senior housing projects was based on income.

It appears that people who move to facilities that provide less supportive care are younger and more are married. For example, Sherman (1971) studied six facilities which included subsidized housing, lifecare facilities, as well as congregate and independent living accommodations. Residents at four of the more protected sites (lifecare and congregate facilities) were older (mean age of 75) and widowed (ranging from 45% to 59%), while at the two retirement villages with younger residents (mean age of 67.8), most were married couples. Parr et al. (1988) reported findings somewhat similar to Sherman's. The researchers in the Parr et al. study gathered data from 500 people living in seven life care communities. The average age of residents was 78.5, and the composition of residents included primarily married couples and widowed women. A probable reason for older residents in life care communities is that self-selection eliminated younger movers who sought sites with more recreational amenities.

Residential Satisfaction

Socio-economic status. People who perceive themselves as having a higher social and economic status apparently also set high standards for their material belongings, such as their dwellings. Campbell, Converse, and Rodgers (1976), in their study of American life in the 1970s, examined people's satisfaction with

their living environment. They found that older adults with higher economic status were less satisfied with their housing environments. They speculated that, compared with lower status older people, higher status adults are more likely to perceive a gap between their high standards and the perceived reality of their dwellings' quality. Lawton (1980), in analyzing over 12,000 elderly-headed households interviewed for the Annual Housing Survey, also found that housing quality was significantly associated with high socio-economic status.

Housing satisfaction. It is well established in the research on housing that those who own their own homes are more satisfied with their housing than are those who rent (Campbell, Converse, & Rodgers, 1976; Dillman, Tremblay, & Dillman, 1979; O'Bryant & Wolf, 1983). Some of the explanations of this include the symbol of social status that home ownership implies in this country, the ability to make desired alterations and improvements, and not having to worry about rent increases or leases ending unexpectedly. There is some question, however, as to whether home ownership is as strong of a housing norm for older people as it is for younger people. Sherman (1972), in her study of retirees in six different settings, found that many people believe that it is a mistake to buy a home at that time of their lives. Dillman et al. (1979), in examining housing preferences ($N = 2,802$) of a representative sample of households in Washington state, noted that the strength of preference for home ownership decreases with age. Whiteford and Morris (1986), in their study investigating life satisfaction of residents living in and near two midwestern cities ($N = 485$), found that older renters are just as satisfied with their housing as older owners. They attribute these results to the fact that either those renters have sought out rental housing all their lives or, for first-time renters, that renting

may free them from fears of personal safety or the difficulties of maintaining a house and yard.

Situational factors of renters may have an important influence on housing satisfaction as well. For example, Michelson (1980) interviewed 761 families in a metropolitan area over 6 years who were in the process of moving. While homeowners were more satisfied than renters, those dissatisfied renters did not intend to move because of problems they expressed. Rather, their motivation to move came from pulls in the future to homes. Reasons stated for wanting to live in houses in the future were also inconsistent with stated reasons for satisfaction with current housing (such as parking, access to public transportation, and landscaping). Thus, renters may use different evaluative criteria than homeowners in judging their dwellings. In a similar, but reverse way, lack of pulls to other housing for residents of retirement facilities may be a motivation to stay. Renting, for them, is not an intermediary step to purchasing a home. Thus, reasons that brought them to a retirement community may act as inhibitors to leaving, and contribute to a positive evaluation of their living environment.

Physical characteristics of dwellings are other criteria that have been used to evaluate housing satisfaction. O'Bryant and Wolf (1983) compared movers and nonmovers over 60 years of age ($N = 484$) in a nonprobability sample of participants in senior centers, clubs, and churches. They found that physical housing characteristics were a better set of predictors for residential satisfaction of renters than for homeowners. Explanations of this prediction were that renters generally pay a higher percentage of their incomes for housing, face the threat of future rent increases, and do not have as much freedom to make changes or

improvements to their dwellings. Additionally, for movers from homes with paid-off mortgages, moving into rental housing can be perceived as an additional housing expense.

While objective housing characteristics are important, there are shortcomings in measuring their effect on housing satisfaction. Many criteria used in measuring objective characteristics now seem outdated, such as presence of complete plumbing, more than one bath in unit, presence of central heat and air conditioning, and electrical outlets present in every room (Lawton, 1980). These characteristics have come to be expected in housing today, as the quality of housing has improved over the years. Additionally, these objective features have accounted for only a small percentage of the explanation of housing satisfaction. Lawton found that objective factors accounted for only about 19% of the variance in such satisfaction. O'Bryant (1982) found that objective housing characteristics accounted for only 14% of housing satisfaction among homeowners, while subjective factors regarding cost, competence, status value of homeownership, and traditional family orientation increased the prediction of variance to 24%. —

Neighborhood satisfaction. The importance of neighborhood satisfaction as a contributing factor to residential satisfaction has been determined by several researchers (Jirovec, Jirovec, & Bosse, 1985; Lawton, Nahemow, & Yeh, 1980). Lawton et al., in looking at the well being of older adults in federally assisted housing, found that satisfaction was greater in age-segregated sites located in smaller communities where the risk of crime was low. Jirovec et al., utilizing 100 voluntary participants aged 60 to 81 from a longitudinal study of the Veterans Administration in Boston, combined responses measuring housing and neighborhood satisfaction to measure the dependent variable, residential

satisfaction. Each participant was asked to rate the conditions of his or her housing situation and neighborhood setting on a 7-point scale with bipolar opposites. A total of 56.6% of the variance in residential satisfaction was accounted for by one housing and four neighborhood conditions. The significant predictors were neighborhood beauty, safety, interest level (boring/interesting), and quietness, and housing ventilation.

Aesthetics and privacy. Measures of the aesthetics of housing and neighborhood environments (such as "neighborhood beauty") may be difficult to define but they are nonetheless a reflection of one's perception of the environment. Rubinstein (1989), in an ethnographic study of seven elderly informants, describes a "social-centered process" (p. 47), which is a reflection of an individual's cultural rules for ordering and arranging space, as well as a "body-centered process" (p. 47), reflecting the awareness of the body in respect to a variety of media with different sensory textures such as space, light, color, visual imagery, and ambiance. Embodied in these processes is the aesthetics of the environment, a term that, although a very personal value, is an important value when rating residential facilities. O'Bryant and Wolf (1983), in examining explanations of housing satisfaction of older homeowners and renters (N = 454), determined that "comfort" embodied concepts of quality in the environment and a person's satisfaction with that quality. These researchers commented that comfort is a notion that bridges objective reality with personal feelings and beliefs. Rubinstein, too, found that "comfort" emerged as a reason that people are content to remain in a residence.

The importance of privacy as a predictor of residential satisfaction has been verified by several researchers (Butterfield & Weidemann, 1987; Carp, 1966; Hamovitch & Peterson, 1969).

Privacy includes privacy from one's neighbor and privacy within one's dwelling. Each of the referenced studies was done among residents in apartment-style buildings, in which density of residents would be more concentrated than in private homes; thus, the importance of privacy may be particularly relevant. __

Maintenance. Along with the subjective appraisal of what is comfortable in a house, an appraisal of the maintenance of an environment is important. Butterfield and Weidemann (1987) examined factors that were related to older residents ($N = 120$) in a mixed-age housing site in Illinois. An important predictor of residential satisfaction for older residents was "attractiveness", a term that included a noninstitutional exterior, home-like appearance, ability to find one's way around the site easily, and suitable interior units. These researchers commented that "A well-maintained housing site gives the impression that residents care about their home and is therefore more likely to encourage residents to respect the environment and contribute to the continuation of a high level of maintenance" (p. 134). They commented that an aesthetically pleasing environment indicates to residents that they are assets to society and promotes the perception that the environment is a safe place to live.

Real or perceived deviations in the maintenance of the physical environment could easily contribute to residential dissatisfaction by not meeting residents' initial expectations. In looking at the life stages of 36 retirement communities, Streib, Folts, and LaGreca (1985) noted that once residents are moved in, most are seeking stability--a continuation of the conditions they thought were present when they moved in. Golant (1984) also addressed the stability of retirement facilities. He commented that retirement facilities offer residents a relatively ordered and predictable setting and lifestyle, with considerable

assurance that the social environment and the facilities that presently exist will not significantly change in the near future. Schulz and Brenner (1977), in reviewing relocation stressors in research literature, hypothesized that the more predictable a new environment, the less negative the effects of relocation.

Management. Many residents in independent living facilities move from traditional single-family homes in the community that they have managed themselves. As such, these in-movers give up control of important aspects of their housing environments. Managers and management policies become important influences on the day-to-day lives of the residents. Butterfield and Weidemann (1987), in examining 37 housing sites for variables that contributed to residential satisfaction, found that for people over 65, management was among the top four predictors of residential satisfaction (the others being privacy, facilities provided, and access to people and the community).

For some movers, relinquishing control can be a source of relief from burdensome responsibilities. Free (1995), gathering data for an ethnographic study on residents of a private retirement facility, found that residents were often relieved from the stress of overextension of personal space and responsibility when relinquishing control of portions of their environment to others. Formal retirement living gave these older adults the excuse to grant others the responsibility for portions of some areas of their lives. This attitude justified a dimension of dependence without loss of perceived autonomy, control, or self esteem. Free speculated that by reducing personal responsibilities and spatial environment, residents may experience advanced self-confidence in their competencies, and maintain a satisfying amount of power. Perceived autonomy may actually be

unrecognized loss of control, however, particularly if management turns out to be lacking in the qualities important to residents.

Johnson et al. (1993) found that the leadership style of the manager at subsidized elderly housing complexes ($N = 210$) had a significant direct effect on the residential satisfaction of respondents, and it was somewhat stronger for the group of residents with nine or fewer years of education. The researchers speculated that these latter findings may have been due to the possibility that those with more education had held more management jobs themselves, were better able to understand the residents' rights as contained in the lease, and believed themselves to be on a similar social level as the manager.

Francescato et al. (1979) evaluated the management qualities important to tenants in HUD-assisted housing in a study on residential satisfaction. Management was considered satisfactory if staff was accessible for conversations, friendly and cooperative; if complaints were followed upon quickly; and if residents perceived that rules met their needs and were fairly and consistently enforced.

Summary

The pushes and pulls to retirement communities include current environmental and social factors, as well as personal considerations of future needs and concerns. Seeking out an environment that addresses these personal needs and wants should provide a congruence between the individual and the environment. Older adults with financial resources to make choices in housing have options to seek out a congruent environment. Those adults who seek decreased maintenance demands and a more supportive environment, however, must turn over the day-to-day operation of the community to management personnel. Relinquishing personal control in an environment may require tradeoffs that become

especially relevant if the stability that residents sought is disturbed by management or maintenance issues.

Chapter III

Methodology

The purpose of this study was to examine the relationship between motivations for moving to independent living retirement facilities and subsequent satisfaction with that environment. This study was limited to nonsubsidized townhomes leased to older adults, with entrance fees required, and health care amenities on site. In preparation for a mail survey, this researcher convened focus groups among townhome residents in order to verify research themes and identify issues that may not have been addressed through findings in the literature review. The researcher then developed a mail survey that was sent out to all townhome residents and analyzed data from that survey.

The following chapter contains a description of the setting and methodology for this study including: background for the research, purpose of focus groups, focus group procedures and findings, operational definitions, mail survey instrument development and collection procedures, and data analysis.

Setting

In order to understand the factors that contributed to the pull of the retirement community, archival data were studied to determine the historical and promotional efforts of the facility, as well as the surrounding community.

Town. The retirement community (hereafter also referred to as "the Village") under investigation is located in Blacksburg, Virginia. The town is the home of Virginia Polytechnic Institute and State University ("Virginia Tech"), a major research university with an enrollment of 25,000, and is within 20 minutes

of two smaller institutions of higher learning. The town, located between the Blue Ridge and Allegheny mountains in southwest Virginia, has a population of 34,500, approximately one third of which includes a year-round student population. The area has distinct seasons, but fairly moderate temperatures, with an average of 70 degrees in the summer and 32 degrees in the winter. The town itself has a promotional brochure, entitled "A Guide to Retirement Living," that emphasizes its moderate climate, low crime rate, healthcare facilities, and cultural and recreational opportunities. The town has three movie theaters in or in close proximity, a shopping mall on the outskirts of the town, and various shops and restaurants in the immediate area. Within the county, facilities for recreation include public and private recreational centers and well-used bike trails, as well as campgrounds, waterways, and hiking areas.

Retirement community. The retirement community itself is located within 10 minutes of downtown Blacksburg, the university and nearby shopping mall, and within 5 minutes of the regional hospital. The town does not provide public transportation to the site; however, there is a well-paved road through rural residential areas, as well as a Village van available for various outings.

The Village, located on 220 wooded acres, has a unique history, having been founded by a couple who emigrated from the Netherlands and settled in the area when he became a professor at Virginia Tech. It was their goal to make a contribution to the American people as an expression of gratitude for America's role in liberating people from the Netherlands and other countries from the oppression of World War II.

The Village was organized for "exclusively charitable purposes" in 1974. Organizing members established a Foundation

that is set up as a nonprofit, tax exempt corporation. The stated vision of the Village is to enhance "the quality of life of older persons," and its stated mission includes providing an "affordable, safe, comfortable, and attractive living environment for residents," as well as a dedication to learning about aging through research. The Village is overseen by a voluntary Board of Directors, and actively managed by a president (CEO). Other executive positions include directors of Marketing, Housing and Resident Services, Environmental Services, and Assisted Living Center.

The Village is composed of 70 nonsubsidized townhomes, three buildings housing rent-subsidized apartments (148 units), and a 73-unit assisted living facility with dining and limited nursing services. The assisted living facility recently underwent renovation on an upper floor to accommodate an intensive assisted living wing. There are current plans to begin construction of 15 additional townhomes in 1997. The Village has a 100-year plan of development, related to the economic growth of the region and the different needs of each of five generations of older citizens. This plan calls for the construction of a nursing center, and affiliated pavilions, as well as a Gerontology Center in the near future. The Village recently received approval from the state to build a nursing center, after a rigorous and drawn out application procedure.

Each of the three types of living accommodations is separate from the other, although the subsidized apartments and assisted living facility are in close proximity to the Activity Center. The townhomes are separated from the two other areas of housing by a road and wooded areas. There are extensive walking trails on the grounds (including a separate trail around the townhomes), as

well as a nearby walking trail developed by the town of Blacksburg for public use.

Townhomes. The promotional brochure describes the features that pull older adults to this independent living facility. It states that the townhomes were designed for seniors who want to stay active in pursuit of the finer things in life without the worry of home repair, lawn care, or the sense of isolation that can come from living in a neighborhood in transition. It points out the "camaraderie" that exists among residents who share many of the same life experiences and interests. The brochure also emphasizes the many activities provided by the surrounding college campuses, and the attractiveness of a small town and a moderate climate. It also features, with both words and pictures, the wooded setting of the Village, the attractive landscaping, and award-winning architectural design. There is no mention of the assisted living facility, subsidized buildings, or projected nursing center at the site.

The one-story townhomes consist of four cluster-type sections built over a 14-year period, with two sections opening within the last year. The units all have decks, and range from 1080 to 1300 square feet, including a kitchen with full appliances, and most also have two bedrooms and baths, a small den, and large living/dining area. The newer units have the larger floor plans, and some have a single-car garage and basement. Entrance fees range from \$80,000 to \$154,000, depending upon location and amenities. (The average sales price for homes in Blacksburg in 1997 was \$151,000.) These fees are guaranteed to be at least 50% refundable depending upon the length of time the residences are occupied. Units are leased by the residents who pay monthly maintenance fees (currently under \$350 per month). Leasing a

townhome does not guarantee a resident a unit in the assisted living facility, should that become necessary; however, it is generally understood that townhome residents will have priority over residents from outside the facility.

Methodology

Background. The retirement community under study has a cooperative partnership with three nearby institutions of higher learning, including Virginia Tech, which the researcher attended, to foster research in aging. As such, the management of the retirement community contacted the Center for Gerontology at Virginia Tech to do a residential satisfaction survey. Before the researcher proceeded with this project, a meeting was held with the Research Committee of the retirement community, at which she proposed the procedure, including convening of focus groups and a subsequent mail survey, and time frame to be followed. The researcher was known to management through a summer internship performed there. The management of the facility specifically was interested in residents' attitudes on maintenance, design and construction, understanding of policies and procedures, and perceived value for the price. Information about future use of the van service was also requested. The Research Committee attached no conditions to doing the research other than a request for anonymity of the participants. Approval was granted, and preparation for convening of focus groups began._

Focus groups. To assist in getting an overview of what residents perceived as sources of satisfaction or dissatisfaction, focus groups were convened. It is not the purpose of focus groups to reach consensus, rather focus groups produce qualitative data that can provide insights into the attitudes, perceptions, and opinions of participants. One of the disadvantages of surveys, which use predetermined, close-ended questions, is that they are

limited by the choices offered and, therefore, the findings could be unintentionally influenced by the researcher by oversight. Additionally, attitudes and perceptions are developed in part by interaction with other people. Using the permissive group environment of focus groups gives individuals license to divulge emotions and issues that often do not emerge in other forms of questioning (Krueger, 1994).

Focus groups also provide triangulation to a study. Triangulation allows the researcher to discover aspects of a phenomenon more accurately by approaching it from different vantage points using different methods (Touliatos & Compton, 1992). Focus groups can also help verify research themes and clarify issues that may not have been addressed through research findings. Findings of the focus groups conducted in this study helped to guide the development of a mail survey, as well as provided triangulation for the study. __

Focus group procedures. The management staff of the Village provided the researcher with names and telephone numbers of residents of the townhomes, and the CEO of the retirement community sent a letter to each household to inform residents of the focus groups and follow-up survey (Appendix A). Stratified random sampling provided a proportionate number of representatives from each townhome section for the focus groups. Twenty-one participants were selected using this procedure, based on Krueger's (1994) suggestion of 7 to 10 participants per group, and the fact that the total group size was only 94. A total of 30 people were contacted by telephone (see Telephone Instrument, Appendix B) with 21 agreeing to participate; 7 had other obligations and 2 declined. Three focus groups were convened over a 2-day period, during mid-morning and mid-afternoon, in a vacant

townhome on the premises. Each session lasted approximately 1 to 1 1/2 hours.

A notetaker was present at each session, and a tape recorder was used to record the meetings. Participants were informed of these methods of recording the sessions, and there were no stated objections. Transcription of tapes was done by an independent party. Each person involved in both notetaking and transcribing signed a confidentiality agreement (see Appendix C), at the investigator's request, so as to preserve the confidentiality of the information disclosed. Participants were asked to sign an informed consent form, designed and provided by the investigator (see Appendix D), guaranteeing their anonymity. Six questions were constructed to elicit open-ended responses (see Appendix E), with probing to further clarify an issue.

Findings from focus groups. As an opening question at each focus group meeting, each participant was asked individually to explain what had motivated him or her to move to this facility. Typical responses included issues of houses too large, hard to keep up houses since spouses died, and children living in the area of the retirement community. Some participants complained of increasing health problems, such as arthritis, and several commented that "you don't want to wait too long to move," implying that it was better to move while there were still options and health did not limit choices. A few people mentioned liking the fact that there would be no house to close out when estates were closed.

When asked if they had considered, or would consider, moving in with children, there was seemingly unanimous agreement that they would not. Reasons were varied. Some mentioned the fact that careers take children to other places, and, noting the difference in lifestyles among different age groups, one man said

he would go "stir-crazy living in that environment" (of computers, technology, and music). Several talked of having tended to frail parents or grandparents themselves, and the desire not to burden their own children with this caregiving role, although, paradoxically, they also expressed a desire to "have our children involved in our care." Thus, they appear to wish to be physically close to children, but not put the responsibility of tending to health needs on children.

Residents found out about the facility in several ways--word-of-mouth being most common. However, there were several who had instigated a very definite search over time, and over several states, contacting state Departments of Aging or searching literature in the library, and following up with visits. These methods were mainly employed by those who lived in other states. A few people spoke of "moving too soon." When queried further, it appeared these people had moved shortly after the death of someone they were close to, and they felt they had acted more on the advice of others than on their own, carefully-thought-out decisions. Others said that they were glad to be here now because health problems had developed and, if they had been in their own homes and neighborhoods, there would have been no one to help them.

Concerning their expectations at this facility, one person summed up the majority of responses by commenting that "you have all the advantages of owning your own home, but you don't have the worries and the problems." Another referred to "the security of being taken care of with our money!" Several spoke of the health-related amenities available, and their expectation not to have to move again. The availability of social relationships was also mentioned, particularly by people who had been out of the working

world for some years or who had friends that had moved or passed away.

When asked what they liked about living here, there were many comments about the people in the neighborhood. Neighbors were perceived as friendly, but respectful of each other's privacy; as one person said, "everybody waves when you're out, but we knock on each other's door." While there was no organized welcome for newcomers, several spoke of having block parties to get acquainted. There was also consensus on the appeal of the rural setting. One person commented that "I'm just glad to be out of the traffic and hassle of a large city," while another mentioned "I love to...sit out here in the back and watch a thunderstorm come up, or at night in the moonlight," and still another liked the fact that "in ten minutes you can be wherever you want to go and the driving is easy." They liked being near to doctors' services, including a hospital that is fewer than two miles away.

Residents expressed various feelings about getting things repaired in the apartments. Some people spoke of just picking up the phone and "they tend to your needs right away." Several other people complained about the process that residents go through, reporting to the Resident Manager, who then calls Maintenance. Several participants complained that maintenance personnel would not come without a work order, and obtaining a work order was a slow process. Residents also complained about maintenance personnel not calling before they came to repair something, as maintenance workers have keys to let themselves in if the residents are not home. This seemed an invasion of privacy to residents who complained. One person commented that there needed to be more maintenance personnel, but "if you complain about that, they're going to raise maintenance fees."

Several who had used the emergency pull cords commented on the quick response they received. In fact, the pull cords may represent more than they are able to provide. One woman spoke of falling, and being unnoticed for some long hours (she was not within reach of a pull cord). Although these are private residences, and not under outside surveillance, she clearly had an expectation that someone would have come to her aid. Recently, personal call buttons have been made available to residents (for a fee). These are worn on a lapel, and will alert security personnel on site when pushed.

When asked about the physical layout of the townhomes, few people complained. As one person commented, the rooms are "small, but adequate--with everything in its place." They attributed acceptance of the physical layout to being able to view a townhome before signing the lease, so that "you knew what you were getting here." As one person noted, "you want different things at different ages," and several people supported the comment of one participant who said he wanted "no surprises" at this stage of his life. Residents perceived their environments as quiet and "soundproof," and they liked the peace of mind of knowing their units will be inspected yearly. In the older units, the main complaint from residents was about the heat pumps, which residents claim do not heat adequately in the winter. The newer units all have gas heat.

The residents in the newer (and somewhat larger) townhomes were not always able to view a finished product, as many were under construction, and this contributed to different perceptions of the environment. These residents had complaints about the landscaping, which was not yet in place, and they were disappointed that some of the areas they thought would be landscaped would now have to accommodate drainoffs. A few of the

new townhomes have basements and garages; however, the basements are not accessible through the townhome, which was a surprise (and disappointment) to one resident upon moving in. (A recent flyer advertising the townhomes coming under construction points out that basements are accessible from outside decks).

Few residents complained about the price--most agreed it was a good value for the money. Several liked the fact that they did not have to purchase services they did not want, such as apartments elsewhere with dining services included in the rent. Costs in the community were also considered low, and having a university nearby was a plus: as one resident commented, this is "not just a dying town with retired people in it." Several residents expressed concern about where their money was going, and worried that the facility was not completing the landscaping because it was out of funds.

Several residents voiced a concern about the ongoing financial condition of the establishment. They worried that the fees received on the new buildings did not cover the buildings' costs, and that money was borrowed from one entity (their own) to pay for the subsidized units and the assisted living unit. A few people expressed concerns about what they perceived as very conservative investments of the capital reserves (although this information is not disclosed by the facility) as well as a sense that money in escrow funds would not be sufficient for repairs and improvements.

The residents in all three focus groups had two main complaints. One of them was with management. Residents complained about the CEO's manner of handling questions--a sense that he talks down to residents and does not listen to their problems. Many said they did not feel free to express what they feel, and that he brushes off their questions. If individuals

pursue their issues with the CEO, "he doesn't pay any attention to you." Participants stated there was a high turnover in staff, which they perceived as evidence that "top management is difficult to work with."

When asked about when they might have interaction with the management, most of them were vague. There clearly was an expectation, however, that they should have access to the CEO. Residents complained that "you never see him," and "if you call, he's never in the office." In fact, the president's office is located in one of the buildings of the subsidized units, and residents would not have occasion to see him during any of their daily outings. Several residents stated that he does present the yearly financial report to townhome residents, at which time he discusses raises in the monthly fees, but he has only limited interaction with residents. Although the CEO oversees the entire retirement community, it is apparent that these townhome residents expect him to be accessible, and empathetic to their particular concerns.

The residents have a resident council but it has no power or authority. As one person said, "all you can do is try, and get rejected." One person commented that "we've all managed homes-- they act like you don't know how to manage." From the comments in the focus groups, it was clear that residents were dissatisfied with management. Part of the problem may have been a lack of communication. When asked where they go with grievances, there was no single answer, other than the resident council, which they perceive as powerless.

The other major area of complaint was the fact that the nursing center had not been started, with comments ranging from "misled" to "lied to." Some said that marketing personnel led them to believe the nursing center was near the construction

stage, when it "wasn't even on the drawing board." The perception was, however, that marketing personnel were not at fault but that the top management staff had miscommunicated with residents. While some people had clear expectations that a nursing center should already be under construction, others had a different perception: "It's kind of a tradeoff here. You've moved into an independent living facility. Sometimes the longer you live here, maybe you encounter health problems. Then you may expect certain things still, even though they're not really provided here." For whatever reasons, residents obviously were disappointed that there was not already a nursing center established. As one person commented, it "was part of the package we bought here."

When asked to reflect back on the facility, in spite of complaints mentioned above, participants in the focus groups expressed general consensus that they would recommend the retirement facility to others. Again, they mentioned the decreased maintenance concerns, and the privacy, yet closeness of neighbors. It appeared that many of the reasons why they chose to move here have been validated, although this is not a perfect environment. Unspoken, yet reflected in their comments, was the expectation that aging should not deprive them of being listened to or being deprived of certain controls over their own environment.

Operational definitions. Following the focus group meetings and examination of findings, the influences on moving used in the seven hypotheses to be tested were operationalized and developed into statements for a mail survey. The concepts within the seven hypotheses were also used in addressing the research question, What, if any, influences on moving predict residential satisfaction? The concepts were operationalized as follows:

Environmental concerns - pushes of the size, floor plan, and upkeep of previous living environment and the pull of decreased maintenance in retirement facility.

Homogeneous community - pushes of loss of social networks and pulls to a supportive community of people living in close proximity who are of a similar age cohort and socio-economic status.

Change in lifestyle - this concept was left to the interpretation of the respondent and not operationalized.

Future support - pushes of health conditions and pulls of maintaining independence and health-related services on site.

Change in neighborhood - pushes of neighborhood declines, pollution, congestion, and the pull to a more safe environment.

Macroenvironment - pulls of features available, or inherent, in the nearby vicinity of the retirement community, such as mountains, a university, or a rural area.

Family and friends - push of social network declining and pulls of moving to be physically closer to family or friends.

Residential satisfaction - includes components of housing, neighborhood, management, and maintenance.

Instrument Development

Following operationalization of concepts to be tested, development of a mail survey to send to all townhome residents proceeded. The survey instrument developed was a self-reporting questionnaire, using primarily Likert-type responses (see Appendix F). The use of a four-point Likert scale (which excluded a "no opinion" category) forced choices. The survey instrument consisted of four sections. Space was allowed at the end of each section for written comments.

The first section of the survey consisted of statements about the push and pull factors that influence moving to an independent

living retirement facility. These statements related to the seven categories of hypotheses tested. These categories also served as the seven independent variables addressed in the research question: (a) environmental concerns, (b) homogeneous community, (c) change in lifestyle, (d) future support, (e) change in neighborhood, (f) macroenvironment, and (g) family and friends. A composite score of statements relating to each variable was computed to measure the seven independent variables as well as the hypotheses. Statements used to measure each variable are contained in Table 1.

Because the design of the study was cross-sectional, the statements about moving decisions were retrospective data. The effect of selective memory may have favored the recall of positive reasons over negative, or the fading of memory over time may have affected the recall of influences by respondents. However, many of the movers in the study were recent movers (within the last year), and reasons for moves that were stated during focus groups correspond with other research findings on moving decisions. Thus, responses recalling past decision-making should reflect reasonably accurate reasons for moving.

The second and third sections of the survey concerned statements about the dependent variable, residential satisfaction. A composite score for the dependent variable was computed for responses to housing satisfaction (Section II, statements 5-19), neighborhood satisfaction (Section II, statements 20-28), maintenance satisfaction (Section III, statements 1-4,6), and management satisfaction (Section III, statements 7-20). Management statements in Section III, #12-15, were adapted from Johnson's (1989) scale assessing leadership style.

Table 1

Statements Used to Operationalize Variables

1. Environmental concerns
 - 1 The upkeep of the exterior of my house and grounds was too demanding
 - 2 I got tired of having to depend on others to help with the upkeep of my home
 - 3 The size of my home was too big
 - 4 The floor plan of my home made getting around difficult (i.e., stairs hard to climb)
 - 20 I wanted to be free of home maintenance chores/repairs
2. Homogeneous community
 - 5 I missed the social contacts I had at work
 - 19 I wanted to live near people my age who would be supportive and understanding of things that are important to me
3. Change in lifestyle
 - 7 I wanted a change in my lifestyle
4. Future support
 - 9 My health was a concern
 - 13 I wanted to know that my health care needs would be taken care of in the future
 - 14 I wanted to maintain my independence for as long as possible
5. Change in neighborhood
 - 8 I wanted a change in neighborhood (i.e., neighborhood declining, pollution, congestion)
 - 10 I wanted a safer neighborhood
6. Macroenvironment
 - 15 I wanted to move to an area with a lower cost of living compared to where I was living before
 - 16 I wanted to live in a rural environment
 - 17 I wanted to live near mountains
 - 18 I wanted to move here because of the nearby amenities
7. Family/friends
 - 6* My social network was declining (friends/relatives moved or passed away)
 - 11 I wanted to move closer to family
 - 12 I wanted to move closer to friends

*Statement #6 was on the mail survey, however, it was eliminated from the statistical analyses due to a low Cronbach's alpha in this category. See discussion in Chap V, "Examination of the Hypotheses, Hypothesis Seven."

The section on maintenance satisfaction originally consisted of statements 1-6 in Section III. After responses were received, however, answers to statement #5 could not be clearly interpreted due to the wording of the statement, and the policy of the facility. The statement was "I wish maintenance personnel would contact me before coming over to do repair work." Because it is the policy of the facility to have maintenance personnel attempt to contact residents, those who agreed with the question may have been agreeing with the status quo or disagreeing with it, depending upon whether, in fact, they were actually contacted first. Several respondents included written comments about this discrepancy. Thus, it was discarded, and only statements 1-4, and 6 were used in the analyses. The composite score for the dependent variable was consequently computed as the mean responses of the 15 housing items, 9 neighborhood items, 5 maintenance items, and 14 management items.

The mail survey also contained five statements that specifically addressed findings from focus groups that were particular to this facility or that the CEO requested (Section II, #1-4; Section II, #29). The report to the Board of Directors of the Village included these five questions, however, they were not included in the analyses for this study.

The fourth section of the survey instrument (Section IV, Statements 1-22) sought demographic information on residents.

Mail survey data collection procedures. Following preparation of the mail survey instrument, management personnel at the Village provided the researcher with names and addresses of all residents of the townhomes. The CEO sent out a cover letter to all townhome residents prior to the mailing of the survey (see Appendix G). The researcher then mailed out a cover letter

(Appendix H), survey, and stamped return envelope to all of the townhome residents ($N = 94$). Approximately a week later, the mailing of follow-up postcards to nonrespondents took place (see Appendix I).

Eighty-one residents returned surveys. One respondent was sub-leasing a townhome and declined to fill out the survey; the wife of another resident returned her husband's survey, noting that he could not respond due to health reasons. Seventy-nine residents participated in the survey, for a usable response rate of 84%. In analyzing the data from these respondents, an assumption was made that nonresponses would not produce a negative bias, and would be distributed in the same way that the usable responses were. The Data and Formatting Plan, Appendix J, lists the coding for completed surveys. Appendix K contains selected written comments from the surveys.

Data analysis. The SAS (Statistical Analysis System) program was used for the analyses. Frequency distributions and percentages were obtained for descriptive purposes. The Pearson product moment correlation (r) was used to determine the relation of the hypotheses to residential satisfaction (using the CORR procedure of SAS). Multiple regression analysis was used to analyze the seven categories of independent variables for prediction of the dependent variable (using the REG procedure of SAS).

Missing data was dealt with in the statistical analyses by using mean imputation. This was done in order to capitalize on the information inherent in the absence or presence of values on the variable in question, to avoid loss of statistical power, and to capitalize on the information present on other variables although missing for some subjects on the variable in question (Cohen & Cohen, 1975). A mean score was obtained for each

statement, and this score was inserted for missing data on corresponding questions ($N = 79$).

Because statements on the mail survey were not previously tested for reliability, Cronbach's alpha was used to assess the reliability of the composite scores of the variables. This provided the opportunity to examine the correlation of items in each variable in measuring a common entity. Although the Likert subscale did not produce high reliability within some of the variables, the majority of statements were retained in order to be true to the conceptual framework proposed.

Difficulties in the estimation of regression statistics may be caused by correlations among independent variables (Pedhazur, 1982). Two indicators of possible presence of multicollinearity were examined: 1) the regression of each predictor which entered the equation through backward elimination, and 2) correlations among the independent variables. Neither of these indicators had values that indicated the presence of multicollinearity.

Summary

The setting for this research was a retirement community in a small university town in southwest Virginia. The procedures for the research included convening focus groups and mailing out questionnaires to townhome residents of the retirement community ($N = 94$). From the focus groups it was determined that participants were most satisfied with neighborhood and housing, and least satisfied with maintenance and management. Specific complaints focused on the timing of repairs, as well as the availability of the CEO. There were also complaints about delays in building the nursing center.

A mail survey instrument, preceded by a letter from the CEO, was sent to all townhome residents. One follow-up postcard was mailed soon thereafter to nonrespondents. There was an 84% response rate.

Data collected from these mail surveys were analyzed using the SAS program. Statistical procedures included the use of Pearson product moment correlation, Cronbach's alpha, and multiple regression.

Chapter IV

Descriptive Analysis

This chapter includes a description of the sample group. Included in the first two sections are their ages, education, professions, marital status, and housing and community characteristics. The last sections contain information about responses on statements measuring independent and dependent variables.

Demographic Characteristics

The sample group of respondents consisted of 27 married-couple households and 29 widowed households, with twice as many women (53) as men (26). Mean age was slightly older for residents now (78.0) compared to when they moved in (74.1) (see Table 2). The age of both groups, however, approached, or was within, the "old-old" category (ranging from 75-85) as opposed to the "young-old" (ranging from 55-74) (Neugarten, 1975; Suzman & Riley, 1985)). These residents, consequently, reflect a somewhat older age than would be expected for the first move following retirement. Perhaps due to their older years, they reported a decline in their health since moving to the facility. Almost twice as many residents stated that their health limited activities some or most of the time now compared to when they moved in (see Table 2).

They were a well-educated group of people, especially for their age cohort: 51.9% of residents reported that a high school diploma was the highest schooling completed, and 40.6% reported having a college or graduate degree (see Table 2). This compares to 34.4% and 14.1%, respectively, of households nationwide with

Table 2

Demographic Profile of Residents

Characteristics	Measurements	
	Years	<i>n</i> <i>P</i>
Gender (<i>N</i> =79)		
Female		53 67.1%
Male		26 32.9
Current age (<i>N</i> =78)		
60-74		28 35.4
75-85		36 46.1
85+		14 17.9
Mean (years)	78.0	
Median (years)	77.0	
Age at time of move (<i>N</i> =79)		
59-74		42 53.8
75-85		28 35.9
85+		8 10.3
Mean (years)	74.1	
Median (years)	73.5	
Education (<i>N</i> =79)		
High school or less		3 3.8
High school diploma		41 51.9
College degree		16 20.3
Graduate degree		10 20.3
Other		3 3.8
Previous occupation (<i>N</i> =79)		
Professional, technical		30 40.0
Managerial		17 21.5
Clerical		7 8.9
Crafts, Service workers		2 2.5
Homemaker		19 24.1
Other		1 1.3
Health (<i>N</i> =78)		
Upon moving in		
Rarely or never limits activities		66 80.7
Limits activities some/most of time		15 19.2
Currently		
Rarely or never limits activities		47 58.9
Limits activities some/most of time		32 41.0

Note. Percentages may not add to 100% due to rounding.

householders 65 or over (U.S. Bureau of the Census, 1997). Reflecting their education, a majority of residents (61.5%) reported working at a professional or managerial occupation prior to retiring.

Housing and Location Characteristics

Prior to moving to the retirement facility, residents had lived in their previous communities for an average of 25.6 years, and in their previous residences for an average of 20.5 years (see Table 3). This long residency, combined with their average age of 74.1 upon moving into the retirement facility, suggests a desire to age in place in their former residences and, consequently, a lengthy delay in the first move following retirement. In spite of this stability, however, the mean number of moves they had made in their adult lives was 7.6, reflecting more mobility during their early adult years, as would be expected to accommodate career moves.

More than 4 out of 5 of the residents (86.0%) reported moving from single-family homes (see Table 3). A small fraction of the sample group (3.8%) reported living in rental units, whereas fewer than 1 out of 10 had lived in condominiums (7.6%). Perhaps seeking communities similar to the ones they had left behind, the majority of residents (64.5%) had lived in small towns or in the country previously, whereas approximately one third (35.4%) had moved from cities or suburbs. The mean distance traveled from previous communities was 360.8 miles. However, more than one third of residents (36.7%) had lived within a 100-mile radius of Blacksburg.

The length of residency in the townhomes ranged from 3 months to 13 years. The majority of respondents were not long-term residents of the retirement facility. Slightly more than one

Table 3 Housing and Community Characteristics

Characteristic	Summary Statistics	<u>n</u>	<u>P</u>
<i>Length of time at previous residence (N=79)</i>			
<1 year		0	-- %
1-5 years		11	13.9
6-10 years		23	29.1
11-20 years		9	11.4
21-30 years		16	20.2
Over 30 years		20	25.3
Mean (years)	20.5		
Median (years)	17.0		
<i>Previous tenure (N=79)</i>			
Single family homes		68	86.0
Rental unit		3	3.8
Condominium		6	7.6
Other		2	2.5
<i>Previous community (N=79)</i>			
City		13	16.4
Suburbs		15	19.0
Small town		46	58.2
Country		5	6.3
<i>Distance from previous community (N=79)</i>			
0-99 miles		29	36.7
100-299 miles		17	21.5
300-499 miles		8	10.1
500 or more miles		25	31.6
Mean (miles)	360.8		
Median (miles)	240.0		
<i>Length of time in previous community (N=79)</i>			
<1 year		0	0.0
1-5 years		9	11.3
6-10 years		17	21.5
11-20 years		9	11.3
21-30 years		10	12.7
Over 30 years		34	43.0
Mean (years)	25.6		
Median (years)	25.0		
<i>Number of times changed residences (N=79)</i>			
1-5 times		35	44.3
6-10 times		21	26.6
10 or more times		23	29.1
Mean (times)	7.6		
Median (times)	6.0		
<i>Length of residence at retirement facility(N=79)</i>			
1 or less years		27	34.1
2-3 years		24	30.3
4-5 years		7	8.9
6-7 years		9	11.3
8 or more years		12	15.1
Mean (years)	4.0		
Median (years)	3.0		

Note. Percentages may not add to 100% due to rounding.

third (34.1%) had lived there for one or fewer years, and almost two thirds (64.4%) had lived there for three or fewer years (see Table 3).

Push and Pull Factors

Respondents were asked to indicate on the survey the amount of influence each statement had on the decision to move, from 1 (no influence) to 4 (great influence). Mean scores were obtained for each statement. Those with scores of 3 or 4 were recorded as positive responses, and 1 and 2 as negative responses. Reflecting findings from focus group meetings, the top five positive influences on moving concerned maintaining independence, being free of home maintenance and upkeep, knowing that health care needs would be taken care of in the future, and moving closer to family (see Table 4). The high rankings of moving to maintain independence and moving closer to family seem to confirm findings from the focus groups that residents do not want to burden their own children with caregiving, but do want children involved in their care.

For movers in the current study of townhomes, the provision of health care needs in the future (ranked third in Table 4), combined with the relatively healthy group of residents upon entrance, suggests a move in preparation for aging found by Meyer and Speare (1985). Participants from focus groups also spoke of the importance of health-related amenities available, and their expectation not to have to move again. These findings confirm those of Parr et al. (1988) who found that the two reasons for moving noted most often by residents of life care communities were the availability of health care and the expectation of being able to live there the rest of their lives.

In regard to macroenvironment, it appears that although amenities outside the facility (such as a university, mountains,

Table 4

Influences on Moving to a Retirement Facility (N = 79)

Influences	Positive Responses	
	<u>n</u>	<u>P</u>
Maintain independence	61	77.2%
Free of home maintenance	53	74.0
Future health needs	51	64.0
Upkeep of house demanding	32	40.5
Closer to family	31	39.2
Nearby amenities	30	38.0
Live near mountains	30	38.0
Live near people my own age	27	34.2
Rural environment	26	32.9
Health a concern	20	25.3
Size of home too big	19	24.1
Lower cost of living	19	24.1
Change in lifestyle	14	17.7
Depend on others for house upkeep	13	16.5
Safer neighborhood	13	16.5
Getting around in home difficult	11	13.9
Closer to friends	8	10.1
Change in neighborhood	7	8.9
Social network declining	6	7.6
Missed social contacts	6	7.6

rural environment) were a pull, the majority of residents did not significantly change the type of community they had lived in previously. Residents from small towns and rural communities accounted for almost two thirds of the movers (64.5%) (see Table 3). Thus, the majority of moves were not moves away from cities or suburbs. Of the 28 respondents moving from these latter areas, only 57.1% indicated that moving to be near mountains, a rural area, or nearby amenities were strong influences (a score of 3 or 4) on their decision to move.

Approximately one fourth of the respondents (24.0%) reported that moving to an area with a lower cost of living (a measure of the macroenvironment) was a positive influence on moving, somewhat dispelling other research that fixed income households move to lower their cost of living (Steinnes & Hogan, 1992). Only about 1 in 5 residents (22.8%) reported that the cost of living was lower in this retirement community than where they had lived before, and less than 1 in 10 (8.9%) reported that it was higher here.

In addition to ranking the importance of individual reasons for moving on a scale from 1 to 4, respondents marked their top three reasons for moving. They were given a list of seven categories corresponding to the independent variables. Many of the respondents marked three items, but did not rank them, therefore, an analysis was done on the total number of respondents who marked each item (see Table 5). In this list, respondents marked environmental concerns (such as decreased maintenance) most often, echoing the comments from the focus groups that living in the townhomes gives them the advantages of owning a home, but without the worries and problems.

The second most frequently mentioned influence on moving was to be closer to friends and family. This finding somewhat

Table 5

Influences on Moving (by Number of Responses)

Influences	<u>n</u>	<u>P</u>
Environmental concerns	59	74.7%
Friends/relatives in area	45	57.0
Future support	39	49.4
Macroenvironment	33	41.8
Neighborhood change	25	31.6
Homogeneous community	24	30.4
Change in lifestyle	13	16.5

Note. Percents do not add to 100% due to multiple markings.

confirms that of McAuley and Nutty (1982) who determined that the convenience to homes of friends and relatives was an important residential preference for older adults. Similar to the findings of Gober and Zonn (1983), many of the residents (62.1%) first heard about this retirement community through friends (29.1%) and next of kin (32.9%). Unlike other findings of these researchers, however, those who reported that friends and family had a strong influence on their decision to move also reported being influenced by the pull of the age-segregated community itself. Gober and Zonn found that those migrants living in retirement communities with close relatives nearby assigned age segregation the lowest value, while those having neither friends nor relatives nearby assigned age segregation more importance. They speculated that if the pull of friends and family is lacking, the potential of forming social ties with people in one's age group in the retirement community becomes more valued.

An analysis was done on respondents in this study to see if those who moved to be near friends/family also reported moving due to the pull of age segregation. Residents with a score of 3.0 or higher on the statements "I wanted to move closer to family" and "I wanted to move closer to friends" had a corresponding mean score of 1.97 on the statement "I wanted to live near people my age" This mean score compares to 2.0 for those who did not mark friends or family as an influence ($t(78) = .9793$, $p > .05$), indicating that the appeal of living near relatives does not exclude the importance of age segregation.

Near the end of the section in the survey on influences on moving (Section I), space was provided for respondents to write in other reasons for moving (see Appendix K). Respondents wrote of moving because of such issues as wanting to be situated because a spouse had cancer, legal issues at a previous home, and not

wanting to be forced to move later due to aging. It should be noted that these other reasons may have been overriding considerations in their decision to move; however, these reasons were not measured in this study.

Summary of Push and Pull Factors

Among the 20 separate statements about various influences on moving, the majority of residents reported that the strongest influences on moving were maintaining independence, being free of home maintenance, and the provision for future health needs. Moving to maintain independence did not simultaneously exclude moving to be closer to family, as both of these factors were important influences in moving in both the focus groups and the mail survey.

Three of the four features of the macroenvironment (nearby amenities, mountains, and rural environment) were also important pulls to the area. Only a small number of residents reported moving to lower the cost of living; however, this may have been because the facility attracted a majority of movers from other small towns and rural areas.

The pull to an age-segregated (homogeneous) community ranked somewhat low among individual reasons for moving (8th among 20 statements). When respondents were asked to mark only three categories that influenced their move, the pull of a homogeneous community was ranked next to lowest (6th of 7 categories). It may be that the draw to a homogeneous community has an underlying appeal, as evidenced by a similar likelihood of those moving to be near friends and family and those moving for other reasons both choosing age segregation as an influence upon moving. However, factors other than age segregation appear to have a stronger influence in the moving decision.

Residential Satisfaction

Forty-three statements that concerned residents' evaluations of their residential environment provided the measurement of residential satisfaction. These statements included issues related to four domains: housing, neighborhood, maintenance, and management. The following four sections include discussions of the findings from responses to these statements. The total responses to each statement formed the basis of the descriptive analyses.

Housing. The housing section consisted of 15 statements regarding the interior layout, comfort, cost, and value of the residence. A strong majority of respondents were satisfied with both the choice (97.4%) and size (84.8%) of the floor plans (see Table 6). In spite of this, almost one in three respondents (29.5%) were not satisfied with the amount of closet space, and almost one in four (23.1%) were not satisfied with the amount of kitchen space.

Residents found the emergency call systems to be very important (88.6%), and also gave strong approval to the quietness of the interiors (93.7%) and safety of the bathrooms (89.9%). Although residents considered the townhomes a good value (79.5%), many considered monthly fees to be high for the services rendered (48.7%). This may reflect the fact that although they considered the entrance fees (fees which permit movers to become residents) reasonable (77.9%), they are less satisfied with the day-to-day maintenance. They also were not satisfied with the quality of the design and construction of the townhomes themselves (40.3%). Several respondents wrote in that they were satisfied with the design, but not with the construction. Written comments centered

Table 6

Positive Responses to Housing Items

Statements	Total Responses (<u>N</u>)	Total Positive Responses (<u>n</u>)	<u>P</u>
Satisfied with choice of floor plans	77	75	97.4%
Comfortable in residence	79	76	96.2
Quiet interiors	79	74	93.7
Bathroom safe	79	71	89.9
Monthly fees not a burden	77	69	89.6
Emergency call system important	79	79	88.6
Space fits needs	77	67	84.8
Townhomes not drafty	78	62	79.5
Good value	78	62	79.5
Entrance fees reasonable	77	60	77.9
Kitchen space fits needs	78	60	76.9
Maintain comfortable temperature	79	60	76.0
Closet space fits needs	78	55	70.5
Quality design and construction	77	46	59.7
Monthly fees not high for services	78	40	51.3

around the perception that management had not provided adequate supervision during construction, which led to problems. Specifically, there were written complaints about insufficient site preparation, which led to drainage problems.

These findings confirm those of focus group participants who also commented on drainage problems. These participants also perceived the townhomes as small but adequate, and serving their needs at this time in their lives. They considered the price a good value for the money, although there was some concern about how funds were being spent.

Neighborhood. The neighborhood section consisted of nine questions regarding the privacy, peacefulness, security, convenience, and social activity of the neighborhood (see Table 7). It contained questions with the highest percentage of positive response rates (above 2.5) among the four sections. Four statements had a positive response rate of over 95%, and pertained to the following perceptions of the neighbors and neighborhood: (a) the neighborhood is safe and secure, (b) the neighborhood is peaceful and quiet, (c) neighbors respect each other's privacy, and (d) residents are good neighbors. Respondents also reported that the location of the facility was convenient to places residents go for outside services, such as banking, grocery, and shopping (92.3%).

The perception of the neighborhood was that it was an interesting place to live (87.2%), somewhat dispelling the myth that living in an age-segregated community is boring (Sherman, 1971). These results are quite probably influenced by self-selection--those who believe age-segregated housing lacks stimulation probably do not move to retirement-age facilities. Nonetheless, the finding that the neighborhood was an interesting

Table 7

Positive Responses to Neighborhood Items

Statements	Total	Total Positive	
	Responses	Responses	P
	(N)	(n)	
People respect my privacy here	79	78	98.7%
Good neighbors here	78	77	98.7
Feel safe and secure	79	78	98.7
Neighborhood peaceful and quiet	79	77	97.5
Convenient to outside services	78	72	92.3
Interesting place to live	78	68	87.2
Not boring	79	67	84.8
Enough social interaction	78	66	84.6
Enough social activities	78	65	83.3

place to live confirms the fact that the majority of those who did choose this type of facility have not found it to be a boring environment. The positive results concerning the environment may also be influenced by the fact that more than 4 of 5 respondents were satisfied with the social interaction with other people in the neighborhood (84.6%), as well as the social activities provided (83.3%).

These findings confirm the positive responses from focus groups about the neighborhood, where participants commented on the respect for privacy, yet "everyone waves when you're out." Comments from focus groups about the support and friendliness of neighbors were also positive.

Maintenance. The maintenance section consisted of five questions that concerned the landscaping, outside appearance of the townhomes, quality of inside repairs, and efficiency of maintenance requests (see Table 8). Although almost nine out of ten (88.5%) respondents agreed that they were proud to have people visit them at the facility, they were not as strongly supportive of the day-to-day maintenance of the facility. Almost one in three reported they were not satisfied with the quality of inside repairs (30.8%) or the efficiency with which maintenance personnel handled their requests (33.8%). Although almost three fourths of residents reported (72.2%) being satisfied with the landscaping, some of those who were not satisfied complained that too much attention was given to landscaping, at the expense of drainage issues and maintenance of walkways. Others wrote in that too much attention was given to new plantings rather than to maintaining what is there (such as weeding and watering). The timing of the survey, which was mailed in May at the height of the planting season, may have accounted for some of the comments.

Table 8

Positive Responses to Maintenance Items

Statements	Total Responses (<u>N</u>)	Total Positive Response (<u>n</u>)	<u>P</u>
Proud to have people visit	78	69	88.5%
Landscaping well maintained	79	57	72.2
Quality of repairs satisfactory	78	54	69.2
Requests handled efficiently	77	51	66.2
Appearance well maintained	78	43	55.1

The statement receiving the lowest percentage (55.1%) of positive responses had to do with the maintenance of the outside of the townhomes. Complaints had to do with a need to paint the decks, wash windows, and maintain walkways. These comments may be a partial reflection of high quality expectations of adults in high socio-economic status (Campbell, et al., 1976; Lawton, 1980). Although focus group participants spoke positively about maintenance, complaints primarily concerned the difficulty in getting maintenance personnel to handle requests efficiently, as well as not calling before coming to repair things. Residents also complained that the landscaping was lacking, in the newer units especially. This finding is the opposite from the mail survey where residents complained that too much attention was given to landscaping. This discrepancy may be due to the timing of the research. Focus groups met in March, when it was still early for spring planting, and the residents responded to the survey in May and early June, following the height of spring planting.

Management. This section (composed of 14 questions) included statements concerning the accessibility and friendliness of management, the importance of maintenance to management, the channels of communication between management and residents, and the accessibility of the resident council to management (see Table 9). This section received the lowest percentages of positive responses of all four sections. Six of the questions received positive responses from fewer than two thirds of the respondents. These questions had to do with believing that the needs and concerns of residents were important (63.6%), giving satisfactory answers (59.2%), being accessible (59.2%), keeping residents well informed (58.7%), keeping open channels of communication with

Table 9

Positive Responses to Management Items

Statements	Total	Total Positive	
	Responses	Responses	P
	(N)	(n)	
Outside maintenance important	77	61	79.2%
Resident council has access	72	56	77.8
Inside maintenance important	77	58	75.3
Will not raise fees if complain	77	57	74.0
Friendly, respectful of residents	76	54	71.0
Residents support management	74	52	70.3
Residents accept information from	75	52	69.3
Exterior maintenance important	79	54	68.4
Resident concerns important	77	49	63.6
Accessible to residents	76	45	59.2
Answers questions satisfactorily	76	45	59.2
Residents kept well informed	75	44	58.7
Open channels of communication	77	39	50.6
Understands problems of residents	76	37	48.7

residents (50.6%), and knowing and understanding the problems of residents (48.7%).

In spite of lower ratings on the above issues, almost three fourths (71.0%) of residents reported that management was friendly and treated people with respect. The term, "management" on the mail survey did not permit differentiation between top management (the CEO) and middle management. Most of the written comments on the mail survey concerned the CEO and reflected the findings from the focus groups that top management was not accessible to residents. As one respondent wrote, he "is out of touch with how we feel.... He stays out of sight because he doesn't want to hear any complaints."

Findings from the focus groups suggested that residents found the staff of middle management more approachable, but expected information and answers to questions to come from top management (the CEO), whom they found unresponsive. It may be that the staff of middle management was more visible (and, thus, perceived as friendly and respectful), while the CEO, being less available, was perceived as indifferent to residents' needs.

Summary of Residential Satisfaction

The section on neighborhood received the most positive responses from residents. Privacy, safety and security, peacefulness and quietness, and the goodness of neighbors were particularly valued. Housing was perceived to be small, but adequate for needs at this time in the residents' lives. There was some dissatisfaction with the construction at the site. Mail survey findings generally confirmed the findings from the focus groups in both the housing section and the neighborhood section.

There was less approval for maintenance, particularly in regard to landscaping where complaints concerned the concentration on new plantings at the expense of the upkeep of other

landscaping. Findings from mail survey conflicted with those from the focus groups in regard to this latter finding, possibly due to the timing of the surveys relative to spring planting.

Similar to focus group findings, mail survey respondents were dissatisfied with the accessibility of the management, its understanding of their problems, and the lack of open channels of communication. These findings may be a reflection of accessibility expectations about top management rather than dissatisfaction with middle management, whom focus group participants found accessible, but lacking the authority to deal with their concerns.

Chapter V

Findings and Discussion

This study included the testing of seven hypotheses concerning influences on moving and their relation to residential satisfaction, using the Pearson product moment coefficient of correlation ($p \leq .05$). A test for the reliability of the composite statements for each variable was done, using the Cronbach's alpha. The results of the reliability tests for each variable (Cronbach's alpha) are given in the following section, "Examination of the Hypotheses." In addition, prediction of residential satisfaction was examined, using the seven variables in the hypotheses as the independent variables. To explore further the influences on moving and components of residential satisfaction, each of the four sections within the dependent variable (housing, neighborhood, maintenance, and management) was regressed on the seven independent variables. An alpha level of .05 was used for all statistical tests.

This chapter presents the results of the statistical analyses for the seven hypotheses, as well as regression analyses of variables.

Examination of the Hypotheses

Hypothesis one. Environmental concerns are positively related to residential satisfaction in independent living retirement units.

Environmental concerns consisted of five questions concerning the upkeep, size, floor plan, and dependence on others to maintain previous residences. The Cronbach's alpha reliability estimate

for the independent variable was .6890. The Pearson correlation coefficient for environmental concerns and residential satisfaction was $-.0157$; and the p-value was .8906 (nonsignificant). Findings did not support the positive hypothesized relation between environmental concerns and residential satisfaction.

While demands on the upkeep of previous housing and the desire to be free of home maintenance chores were among the top five influences on moving, when combined with other measures of environmental concerns, these reasons did not prove to be statistically significant. These influences may be important pushes and pulls, however, they are not positively related to residential satisfaction. Due to this finding, the stated hypothesis one was not accepted.

Hypothesis two. Preference for homogeneous communities is positively related to residential satisfaction in independent living retirement units.

This variable consisted of two questions concerning a desire to live near people of the same age who would be supportive, and missing the social contacts at work. The Cronbach's alpha reliability estimate for the independent variable was .5240. A positive, significant relation existed between residential satisfaction and homogeneous community ($r = .2850$; $p = .0109$).

Results indicate that selection of retirement facilities by those who value living among others in their same age group has a positive relationship to residential satisfaction. As a result of this finding, the null hypothesis was rejected, and the stated alternative hypothesis two was accepted.

Hypothesis three. Preference for change in lifestyle is positively related to residential satisfaction in independent living retirement units.

This variable consisted of one statement regarding a desire for a change in lifestyle, precluding the assessment of internal consistency. Examination of test-retest reliability was outside the boundaries of this study. The Pearson correlation coefficient for residential satisfaction and change in lifestyle was .0322 and it was nonsignificant ($p = .7779$).

This question received a total of only 14 positive responses. The majority of residents had lived in their communities for a rather lengthy time after retirement, and, thus, did not appear to be the amenity-seekers found in the first move closest to retirement. The majority also came from rural communities, suggesting that a change in lifestyle may have been less of an influence in moving. Due to the nonsignificant association between change in lifestyle and residential satisfaction, the stated hypothesis three was not accepted.

Hypothesis four. Preference for future support is positively related to residential satisfaction in independent living retirement units.

This variable consisted of three statements regarding future health care needs, maintaining independence, and health concerns at the time of the move. The Cronbach's alpha reliability coefficient was .5873. The Pearson correlation coefficient for residential satisfaction and future support was .1714, however, the association was nonsignificant ($p = .1309$).

Although future support was among the top three statements that respondents marked as influences on moving, no relationship existed between future support and residential satisfaction. As a result of this finding, the stated hypothesis four was not accepted.

Hypothesis five. Preference for a change in neighborhood is positively related to residential satisfaction in independent living retirement units.

This variable consisted of two statements regarding a desire for a safer and better neighborhood. The Cronbach's alpha reliability coefficient was .6816. The Pearson correlation coefficient for residential satisfaction and change in neighborhood was $-.0427$, and the p-value was .7090 (nonsignificant).

The two statements used to measure future support received few positive responses (13 for wanting a safer neighborhood, and 7 for wanting a better neighborhood), and, thus, were not strong factors influencing moving for this sample of residents. The majority of movers were from single-family homes and rural areas. They all moved to townhomes (not apartments) in rural areas. Although they changed neighborhoods, they may have been seeking similar neighborhoods (that is, such factors as privacy, safety, peacefulness and convenience) rather than a change from their own neighborhoods. Once in the retirement facility, other factors apparently contributed to residential satisfaction.

The Pearson correlation coefficient was both negative and non-significant. As a result of this finding, the stated hypothesis five was not accepted.

Hypothesis six. Preference for features in the macro-environment is positively related to residential satisfaction in independent living retirement units.

This variable consisted of four statements regarding a desire to live in an area with a lower cost of living, near mountains, in a rural environment, and with nearby amenities (such as a university, shopping, medical facilities). The Cronbach's alpha reliability coefficient was .6675. The Pearson correlation

coefficient for residential satisfaction and macroenvironment was $-.1565$, and the p -value was $.1684$ (nonsignificant).

Although three of the four statements measuring pulls to the macroenvironment were among the ten statements with the highest mean scores among influences on moving, the pull to factors in the area surrounding the retirement facility did not have a positive relation with residential satisfaction. As a result, the stated hypothesis six was not accepted.

Hypothesis seven. Preference to live near family and friend networks is positively related to residential satisfaction in independent living retirement units.

This variable consisted of three statements regarding a decline in social network, wanting to move closer to friends and closer to family. The Cronbach's alpha reliability coefficient was $.0600$. The statement with the lowest t -value in the calculation of the Cronbach's alpha, "My social network was declining..." received positive responses from only six respondents. This low number of people suggests that moving due to declining social networks is not an important influence in the moving decision. Removing this statement from the variable increased the Cronbach's alpha to $.2926$.

Although the two remaining statements produced a low reliability coefficient, they were retained based on the following reasoning: a high number of respondents (31) marked moving closer to family as a positive influence, relative to moving closer to friends (8). A potential difficulty with this reliability coefficient is that only a few people responded to one of the two items. Additionally, previous studies linked the two influences on moving (Cuba, 1991; Gober & Zonn, 1983), the model proposed in the theoretical framework of this study specified a need to measure family and friends, and both statements reflect moving

towards supportive social ties. Thus, the two statements concerning moving to be nearer to friends and family were retained as a measurement of the variable.

Calculation of the Pearson correlation coefficient revealed that the relationship between closeness to family and friend networks and residential satisfaction was positive ($r = .2510$) and significant ($p = .0257$). This positive relationship may indicate that the satisfaction of being physically closer to friends or relatives contributes to overall satisfaction, which contributes to residential satisfaction. Additionally, friends and family who lived in the area may have scrutinized the facility on behalf of the potential resident, giving added input to the decision to move. As a result of the positive relationship between moving to be near friends and family and residential satisfaction, the null hypothesis was rejected and the alternative stated hypothesis seven was accepted.

Discussion of Findings on Hypotheses

When testing the seven hypotheses, only the pull of moving to a homogeneous community, and closer to family and friends, were positively related to residential satisfaction. It may be that selecting a community with people one's own age provides more social contacts for respondents who are more socially isolated and, thus, a greater satisfaction with the choice of a retirement facility. Litwak (1985) speculated that people in retirement communities may seek a more shared community experience, characterized by more interdependence and cooperation than would be expected in an age-integrated community. This congruence between wants and characteristics found in the setting may account for the positive relation between seeking a homogeneous community and residential satisfaction. This finding seems to confirm Kahana's (1982) model of the relation of satisfaction to a

goodness of fit between residents' needs in seeking out environments, and characteristics of those environments.

Moving closer to family and friends also had a positive relation with residential satisfaction. Additionally, moving to be near family was among the top five reasons given among influences on moving. This finding differs somewhat from Sherman (1971) who found that moving to be near family or friends was a small factor in the decision-making. Gober and Zonn (1983) also found that movers placed minimal importance on kin as an aspect of place utility, although both friend and family were important sources of information about the area under study. It may be that a significant role of friends and family in the area is to scrutinize the facility on behalf of the potential mover. This endorsement by trusted contacts who are familiar with the wants and needs of the movers may help to assure a goodness of fit for movers, and, thus, contribute to the positive relationship with residential satisfaction.

Several variables did not prove to be positively related to residential satisfaction, although they were important influences upon moving. When comparing composite scores of the variables, environmental concerns (such as decreased maintenance) was marked by the most people as having a positive influence on the decision to move. Sherman (1971) also reported that ease of maintenance was the most frequently selected reason for moving to a retirement facility. This variable, however, was not positively related to residential satisfaction. It appears that the desire for decreased maintenance is a strong push to move from residences, and having maintenance provided at retirement facilities is a strong pull to retirement facilities. Expectations for a factor that is largely outside of one's control, however, may make

satisfaction (once a resident of the facility) largely situational, and not related to prior moving decisions.

Future health support was an important influence on moving also. However, it was not positively related to residential satisfaction. Other studies confirmed the importance of future health care in the moving decision (Longino, 1982; Parr et al., 1988). These studies did not, however, assess residential satisfaction. The lack of association in the current study with residential satisfaction may be because residents separated the presence of the assisted living facility (and future nursing center) from the evaluation of their current residential situation. The knowledge that there would be assistance with health care available in the future, although an important influence on moving in this and other studies, did not contribute to residential satisfaction once at the facility.

A change in lifestyle, marked by only a small number of people as an influence on moving, was not positively related to residential satisfaction. Although it may be a push for moving, it may be too general of a category to influence residential satisfaction. A change in lifestyle could be interpreted many ways, from moving to an age-segregated community to being able to travel more, knowing others will be taking care of the residence. These reasons appear to be unrelated to an evaluation of one's current living environment.

A change in neighborhood was also a small consideration for this group of movers, and not positively related to residential satisfaction. Trends in actual moves to rural environments indicated in previous research (Beale, 1988) did not strongly affect this group of movers. The majority of residents moved from small towns and rural areas, selecting to remain in, rather than

move to, rural environments. Stability may have been more of a factor in moving than a change in neighborhood.

The pull of features in the macroenvironment, although marked by a large percentage of people as an influence on moving, was not positively related to residential satisfaction. Although residents were pulled to the area because of nearby amenities (such as a university, rural area, mountains), or a lowered cost of living, these factors were not associated with evaluation of the microenvironment. It may be that the rural environment outside the facility is not as important as the rural ideals within the retirement community, such as personalized interaction, simplicity and slow social change (Atchley, 1975), when evaluating residential satisfaction.

Multiple Regression: Dependent Variable - Residential Satisfaction

A multiple regression was performed, regressing residential satisfaction (Cronbach's alpha = .7654) on the following independent variables: environmental concerns, homogeneous community, change in lifestyle, future support, change in neighborhood, macroenvironment, and family and friend networks. With all of the variables in the model, the amount of variance explained (R-square) was .2460 ($p = .0042$). While the full model indicated that these independent variables, when taken all together, were significant predictors of residential satisfaction, only three of the variables alone were statistically significant at the alpha level of .05 (see Table 10).

The significance of the regression coefficients was tested, and a stepwise regression was done, eliminating the independent variables one at a time. Stepwise elimination proceeded until only regression coefficients that were statistically significant at the .05 level remained (Pedhazur, 1982). Independent

Table 10

Multiple Regression Analysis: Full Model, Dependent Variable - Residential Satisfaction

<u>R</u> -Square	.2460
Adjusted <u>R</u> -Square	.1717

		Sum of	Mean	<u>F</u>	<u>F</u>
Regression	7	3.9662	0.5666	3.31	.0042
Error	71	12.1567	0.1712		

Variables in the Equation:

Variable	Parameter Estimate	Standard Error	Type II		
			Sum of Squares	<u>F</u>	Prob> <u>F</u>
Intercept	2.7554	0.2137	28.4602	166.22	.0001
Envrnmntl. Concerns	-0.0803	0.0715	0.2153	1.26	.2659
Homog. Comm.	0.2155	0.0730	1.4938	8.72	.0043
Change in Lifestyle	0.0003	0.0533	0.0000	0.00	.9951
Future Support	0.1047	0.0602	0.5181	3.03	.0863
Change in Nghbrd.	-0.0778	0.0752	0.1832	1.07	.3044
Macroenvironment	-0.1222	0.0614	0.6782	3.96	.0504
Family and friends	0.0747	0.0292	1.1286	6.59	.0124

variables remaining in the model ($p \leq .05$) were homogeneous community, family and friends, and macroenvironment (see Table 11). A test of the R-square indicated that it is significant ($R\text{-square} = .1937$; $p = .0010$). The parameter estimates for homogeneous community and family and friends were positive, indicating that as the influence of these two variables increases, one would predict a corresponding increase in residential satisfaction. The parameter estimate for macroenvironment was negative, indicating that the lesser the importance of factors in the macroenvironment, the greater the residential satisfaction. These three variables together accounted for 19.3% of the variance explained in residential satisfaction.

Discussion of Findings: Regression of Residential Satisfaction

When the dependent variable, residential satisfaction, was regressed on all independent variables, only three of the variables were significant. Backward elimination provided three independent variables that remained significant, and predicted 19.3% of residential satisfaction: homogeneous community, family and friends, and macroenvironment. The age-segregation factor, homogeneous community, may encompass the importance of similar socio-economic factors, as well as issues that are subsumed by age, including the availability of closer social ties in a neighborhood of friendly and supportive neighbors. As noted in the focus groups, residents enjoyed the informality and friendliness of neighbors who wave "when you're out, [and] knock on each other's door." This finding confirms much of Atchley's (1975) speculation about the appeal of retirement communities: the personalized interaction, informality, simplicity, and little social differentiation.

Table 11

Multiple Regression Analysis: Final Model, Dependent Variable - Residential Satisfaction

<u>R</u> -Square		.1956		
Adjusted <u>R</u> -Square		.1634		
	Sum of	Mean	<u>F</u>	<u>F</u>
	D.F. Squares	Squares	Ratio	Prob.
Regression	3	3.1540	1.0513	174.64
Error	75	12.9689	0.1729	.0001

Variables in Equation:

Variable	Parameter Estimate	Standard Error	Type II Sum of Squares	<u>F</u>	Prob.> <u>F</u>
Intercept	2.8161	0.1702	47.3324	273.73	.0001
Homog. Comm.	0.2008	0.0641	1.6938	9.80	.0025
Macroenvironment	-0.1283	0.05717	0.8704	5.03	.0278
Family and friends	0.0700	0.0286	1.0368	6.00	.0167

Similar issues of closer social ties may influence the contribution of moving closer to family and friends as a predictor of residential satisfaction. This finding is similar to that of McAuley and Nutty (1982) who determined that convenience to homes of family and friends is a residential preference for older adults. Participants in the focus groups also mentioned the desire to be nearer children, but not burden them with the caregiving role.

The appeal of the macroenvironment (such as rural area, mountains, a university) also contributed to a prediction of residential satisfaction, but in an inverse way. From this finding, one would expect that the less that factors in the macroenvironment influenced moving, the greater the residential satisfaction. It may be that, with outside factors (such as a desire to live in a rural environment or near mountains) of less importance, factors within the facility take on more importance. These factors, therefore, may be evaluated more carefully prior to moving by those who were not influenced by outside factors. Thus, the reinforcement of the continuation of conditions originally sought is an additional contributor to residential satisfaction. This finding confirms other research that emphasizes the relatively stable and predictable lifestyle that residents are seeking (Golant, 1984; Streib et al., 1985).

Multiple Regression: Dependent Variables - Housing, Neighborhood, Maintenance, and Management

The mean scores and standard deviations of each of the four sections within residential satisfaction were as follows:

	<u>Mean</u>	<u>Std. Dev.</u>
Neighborhood	3.56	.34
Housing	3.27	.44
Maintenance	2.92	.73
Management	2.79	.75

Based on the variation in the standard deviations, it appears that residents were responding differently to the four sections. Further analyses were performed to determine if there was a relation between the reasons for moving and each of the four sections that measured residential satisfaction. Four multiple regression analyses were performed, regressing the composite score of each section (as the dependent variable) on the seven independent variables. A test for reliability of the composite scores for each section (Cronbach's alpha) was also performed. The significance of the regression coefficients was tested, and a stepwise regression (backward elimination) was done on those dependent variables that were statistically significant ($p \leq .05$). Only predictors that had F ratios with probabilities $\leq .05$ were retained in the final models. The following are the results of those regressions.

Housing. The Cronbach's alpha of this section (statements 5-29, Section II) was .7879. The significance of the regression coefficients was tested (R -square = .1292, p -value = .0296); however, only one predictor was significant at the .05 level. A stepwise regression was done, and the final predictor remaining in the model was homogeneous community (R -square = .0996; p = .0046). The parameter estimate was positive (see Table 12). This indicates that moving because of a desire to live in a homogeneous community is a statistically significant predictor of housing satisfaction.

Table 12

Multiple Regression Analysis: Final Model, Dependent Variable-
Housing

R-Square	.0996
Adjusted R-Square	.0879

	D.F.	Sum of Squares	Mean Squares	<u>F</u> Ratio	<u>F</u> Prob.
Regression	1	1.5142	1.5142	8.52	.0046
Error	77	13.6876	0.1778		

Variables in Equation:

Variable	Parameter Estimate	Standard Error	Type II		
			Sum of Squares	<u>F</u>	Prob.> <u>F</u>
Intercept	2.9662	0.1132	121.9046	685.76	.0001
Homog. Comm.	0.1853	0.0634	1.5142	8.52	.0046

Neighborhood. The Cronbach's alpha of this section (statements 20-28, Section II) was .6555. The significance of the regression coefficients was tested (R -Square = .1105; p = .2848, nonsignificant). These values indicate that, when taken together, the independent variables were not significant predictors of neighborhood satisfaction. Therefore, no further analysis was performed.

Maintenance. The Cronbach's alpha of this section (statements 1-4, 6, Section III) was .8440. The significance of regression coefficients was tested (R -square = .1982; p = .0232); however, only two of the predictors were significant at the .05 level. A stepwise regression was done, and the final predictors in the model were environmental concerns, homogeneous community, future support, macroenvironment, and friends and family (R -square = .2380; p = .0011). The parameter estimates for these remaining predictors were positive, except for environmental concerns and macroenvironment (see Table 13). The negative parameter estimates in this final model would indicate that, the less important of an influence that environmental concerns and the macroenvironment were upon moving, the greater the satisfaction would be predicted with maintenance. Likewise, the greater the influences of homogeneous community, future support, and family and friends on moving, the greater the satisfaction would be predicted with maintenance. Only change in neighborhood and change in lifestyle were not significant.

Management. The Cronbach's alpha of this section (statements 7-20, Section III) was .9414. The significance of regression coefficients was tested (R -square = .1982; p = .0232); two of the predictors were significant at the .05 level. A stepwise regression was done, and the final predictors remaining in the model were homogeneous community, macroenvironment, and family and

Table 13

Multiple Regression Analysis: Final Model, Dependent Variable - Maintenance

R-Square	.2380
Adjusted R-Square	.1858

	D.F.	Sum of Squares	Mean Squares	F Ratio	F Prob.
Regression	5	9.9326	1.9865	4.56	.0011
Error	73	31.8038	0.4356		

Variables in Equation:

Variable	Parameter Estimate	Standard Error	Type II		
			Sum of Squares	F	Prob.>F
Intercept	2.6440	0.3392	26.4770	60.77	.0001
Envrnmntl. Concerns	-0.3215	0.1120	3.5932	8.25	.0053
Homog. Comm.	0.2459	0.1052	2.3800	5.46	.0222
Future Support	0.2176	0.0960	2.2400	5.14	.0263
Macroenvironment	-0.2122	0.0927	2.2822	5.24	.0250
Family and friends	0.1029	0.0456	2.2163	5.09	.0271

friends (R -square = .1687; p = .0030). The parameter estimates for these remaining predictors were positive, except for macroenvironment (see Table 14). This indicates that if the macroenvironment were not an important influence on moving, one would predict a satisfaction with management. Likewise, for those influenced to move because of a desire to live in a homogeneous community and closer to family and friends, one would expect a greater satisfaction with management.

Discussion of Findings: Multiple Regression of Housing, Neighborhood, Maintenance, and Management

The only statistically significant predictor of satisfaction with housing was the desire to move to a homogeneous community. It may be that the smaller size of the townhomes relative to previous single family housing, the presence of an emergency call system, and closeness of nearby neighbors, contribute to the perception of a more supportive environment that movers influenced by age-segregation seek. This variable, however, accounted for only 10% of the variance in housing satisfaction.

None of the seven variables were statistically significant predictors of satisfaction with neighborhood. A possible explanation for this is that there may not have been adequate domain sampling; for example, two of the questions had to do with the stimulation, or lack of, at the facility. Additionally, because of the high overall satisfaction with the neighborhood reported by residents, there may have been too much homogeneity in the predictors themselves to explain variance in neighborhood satisfaction.

Five out of the seven independent variables were statistically significant predictors of satisfaction with maintenance: environmental concerns, homogeneous community,

Table 14

Multiple Regression Analysis: Final Model, Dependent Variable - Management

<u>R-Square</u>	.1687
Adjusted <u>R-Square</u>	.1354

	D.F.	Sum of Squares	Mean Squares	<u>F</u> Ratio	<u>F</u> Prob.
Regression	5	8.7515	1.7503	3.61	.0057
Error	73	35.4369	0.4854		

Variables in Equation:

Variable	Parameter Estimate	Standard Error	Type II Sum of Squares	<u>F</u>	Prob.> <u>F</u>
Intercept	2.3696	0.2864	33.5119	68.42	.0001
Homog. Comm.	0.2459	0.1080	2.5401	5.19	.0256
Macroenvironment	-0.2139	0.0962	2.4204	4.94	.0292
Family and friends	0.1284	0.0482	3.4804	7.11	.0094

future support, macroenvironment, and family and friends. Two of the predictors had negative parameter estimates: environmental concerns and macroenvironment. This indicates that as the influences of these upon moving decreases, one would expect the satisfaction with maintenance to increase. It may be that if the concerns about upkeep on former residences (environmental concerns) were not important pushes to move, then they are likewise not such an important pull to the facility. Subsequently, maintenance may be viewed more positively because prior expectations were not so high. For those residents who were less influenced by factors outside the facility (macroenvironment), it may be that features within the facility were scrutinized more carefully prior to moving in, and subsequent satisfaction was, therefore, more predictable.

The high number of predictors of satisfaction with maintenance may also reflect opinions that were very situational once moving in--those who had no problems for maintenance to take care of probably reported positively, as did those who were pleased with the efficiency of maintenance. These similar results for different reasons reflect findings from focus group discussions, at which some residents praised the efficiency with which their problems were handled, others said they had had no problems for maintenance to handle, and still others complained ardently about how their problems were handled.

Satisfaction with management was predicted by three of the seven independent variables: homogeneous community, macro-environment (negative parameter estimate), and family and friends. These were the same predictors that were significant for the full model of residential satisfaction discussed above, perhaps reflecting the importance of management in the assessment of residential satisfaction. This finding supports the findings of

Johnson et al. (1993) that the leadership style of the manager had a significant direct effect on the residential satisfaction of respondents.

Summary

This chapter contained a discussion of the relation of seven hypotheses to residential satisfaction, using the Pearson product moment coefficient of correlation. The pull of a homogeneous community and moving closer to family and friends were positively related to residential satisfaction, using multiple regression. The seven independent variables were examined for prediction of residential satisfaction. The importance of homogeneous community, family and friends, and the lesser importance of the pull to the macroenvironment were predictors of residential satisfaction.

Each section of residential satisfaction was examined for predictors of satisfaction. A predictor of housing satisfaction was the pull to a homogeneous community. There were no predictors of neighborhood satisfaction. There were five predictors of satisfaction with maintenance: environmental concerns, homogeneous community, future support, macroenvironment, and family and friends. Satisfaction with management was predicted by homogeneous community, macroenvironment, and family and friends.

Chapter VI
Summary, Conclusions and Implications,
and Recommendations for Further Research

This chapter includes the summary of procedures and findings for this study. It also contains a discussion of conclusions and implications based on these findings, as well as recommendations for further research.

Summary

The major objectives of this study were to (a) describe why people move to retirement facilities, (b) describe residents' satisfaction with their living environments, and (c) examine the relationship between why people move to independent living environments and how satisfied they are with their new environments. The sample of this study consisted of residents of an independent living section of nonsubsidized townhomes within an age-segregated retirement facility, with an assisted living facility on site.

Focus groups, consisting of residents of the townhomes, were convened in March, 1997, in order to verify research themes and clarify issues that may not have been addressed through research findings. A survey instrument was subsequently designed and mailed to all townhome residents ($N = 94$) in May, 1997. A total of 79 usable responses were obtained from the initial mailing and one follow-up mailing (84% response rate).

There was a similar number of married-couple households (27) and widowed households (29) within the townhomes. The mean age for residents was 78.0 years. A majority of residents had moved

from single-family homes (84.7%) and had lived in their previous residences for an average of 20.5 years. The majority also had moved from small towns and rural communities (64.5%) and had heard about the facility through family and friends.

The relationships between influences on moving and residential satisfaction were examined by correlation analysis. Of the seven variables influencing moving, preference for a homogeneous community and to be closer to family and friends were positively related to residential satisfaction. Both variables are related to being within or near a supportive environment, a factor which these movers sought.

The relationship between influences on moving and residential satisfaction was examined using multiple regression, regressing residential satisfaction on all seven independent variables. Preference for a homogeneous community and to be near family and friends emerged as significant predictors of residential satisfaction, along with a preference for features in the macroenvironment. Moving to a more supportive environment (by being closer to neighbors or family and friends) predicted a greater satisfaction with the residential environment. The influence of future support, however, was not a predictor of residential satisfaction. Although the support offered at the facility for future health needs was important to residents as an influence in moving, this influence did not predict residential satisfaction.

Preference for features in the macroenvironment had an inverse relation with residential satisfaction in the final model, suggesting that the greater the satisfaction, the less of an influence the macroenvironment had on moving. This may be explained by a more careful scrutiny of the retirement community by those for whom features of the macroenvironment were not an

important influence on the moving decision. The final model, with the three significant variables of macroenvironment, homogeneous community, and family and friends explained 19.6% of the variance in residential satisfaction.

The relationship between influences on moving and satisfaction with the four components of residential satisfaction (housing, neighborhood, maintenance, and management) was also examined using multiple regression analysis. Preference for a homogeneous community emerged as a significant predictor of housing satisfaction, explaining 10% of the variance. Although accounting for only a small portion of the variance in housing satisfaction, the supportive and homogeneous environment provided by age-segregation is positively related to the prediction of housing satisfaction.

No significant predictors emerged for neighborhood satisfaction. This may be due to the fact that there was such a high satisfaction with the neighborhood among all the residents there was not enough variance to explain the satisfaction from among the influences on moving.

There were five significant predictors of satisfaction with maintenance, explaining 23.8% of the variance. These predictors were environmental concerns, preference for a homogeneous community, future support, preference for features in the macro-environment, and preference to live closer to family and friends. Only change in lifestyle and change in neighborhood did not predict satisfaction with maintenance. Decreased environmental concerns upon moving predicted satisfaction with maintenance, suggesting that maintenance may be viewed more positively if prior expectations concerning maintenance were not important in the moving decision. Satisfaction may also be very situational,

depending upon prior expectations as well as the frequency of requests and efficiency in handling.

There were three significant predictors of satisfaction with management, explaining 16.9% of the variance. These were preference for a homogeneous community, preference to live close to family and friends, and preference for features in the macro-environment. These were the same variables that predicted overall residential satisfaction, suggesting the importance of management in assessing residential satisfaction.

Conclusions and Implications

Consumers. One of the strongest indicators of satisfaction with one's residence in a retirement facility is the pull of a supportive and homogeneous community. Those who chose retirement facilities based on these influences appear to be among the most satisfied with their residential surroundings. The appeal of an age-segregated, homogeneous community, which emphasizes personalized interaction, little social differentiation, informality, and support acts as a pull to this cohort of retirees who grew up before the growth in metropolitan areas. Older adults need to understand that retirement facilities can offer not only a supportive physical environment, but also a supportive group of neighbors. Consumers, therefore, need to address their own level of wants and needs in regard to homogeneity in the decision-making process.

Those movers who were most attracted to the macro-environment were among the least satisfied with their residences. Potential movers who are drawn to features in the area need to carefully scrutinize this nontraditional type of housing during the decision-making process. Other housing in the community may be a more satisfactory option for consumers if features of the macroenvironment are particularly important.

Family and friendship networks serve as both providers of information and pulls for older adults to areas that have retirement communities. Scrutiny by trusted friends and family members living near retirement facilities may be a factor in contributing to a greater residential satisfaction for residents. Movers who chose to move closer to friends and family were among the most satisfied with their residences. Additionally, these movers have the convenience of informal contacts, while maintaining their own independence. This is important information to older adults whose cultural influences include a growing propensity to live alone.

The majority of movers to this independent living complex moved from single-family homes. These older movers, who may not have recent rental experience, need to be particularly aware that they relinquish certain controls over their environment when they rent or lease. Expectations about maintenance and management should be addressed prior to becoming a resident. Potential movers should seek out information about such factors as channels of communication from top and middle management (e.g., who will be handling their needs once they become residents) and maintenance policies and services provided (e.g., the procedures and timing involved in handling maintenance requests). These movers also need to determine their own expectations about maintenance services and management personnel. Satisfaction with management appears to be closely associated with satisfaction with residences, therefore, the role of management should be addressed carefully by potential movers in the decision-making process.

Movers to independent living housing with health-care complexes on site (such as assisted living or nursing centers) appear to be moving in preparation for aging. The participants in this study were generally older than those immediately retired,

and most moved from single-family residences to these (smaller) townhome units. Residents reported that moving to maintain their independence and to address future health needs were among the top five reasons for their moves. Although movers to this facility were relatively healthy when moving in, their health had declined over time. Potential movers should request clear policies from facilities about the limits of health care that they may seek from outside providers (such as home health visits), as well as the health conditions that are acceptable in order to remain in their housing units. How their future health needs may be addressed within their living environments should be investigated prior to becoming residents.

Managers and marketers. The pull to a homogeneous community and to friends and family are predictors of residential satisfaction. Marketing directors of retirement facilities should be aware of these predictors, and emphasize the positive aspects of homogeneous communities in their advertising and contact with prospective residents. Addressing marketing to children of retirees should assist in attracting residents who will be more satisfied with their housing.

The appeal of future health support is an important pull to older movers hoping to maintain their independence. Retirement communities with health-related facilities on-site appear to attract the "old-old" to their independent living sections. While these movers are comparatively healthy upon moving in, their move may be seen as a preparation for aging. Managers need to be prepared to accommodate some aging in place that includes declines in health, as well as have clear guidelines about these issues in their policy manuals.

It is important to realize, however, that, although on-site health facilities attract older adults, upkeep and maintenance of

their own independent housing can be a source of dissatisfaction for residents. Those facilities whose entrance fees or rents attract movers from high socio-economic status should expect a clientele with expectations of high-quality environments. A high number of predictors for satisfaction with maintenance suggests that this satisfaction may be very situational. However, efficiency in handling maintenance requests is very important to residents, as is the upkeep of the inside and outside of their living environments.

Management itself plays an important role in residents' evaluation of their residences. Management should be friendly and accessible, keep residents informed of issues that pertain to them, and have an understanding of problems that are relevant to residents. One method of gaining an understanding of residents' concerns is through a resident council that has the authority to voice its concerns to management. Residents need to know that structured avenues of communication are available to them.

It is also important for managers to realize that many residents have not had recent rental experience, but they have managed their own homes. Therefore, although they seek decreased maintenance, relinquishing control of their environment to management may entail a difficult adjustment. A recognition of the backgrounds of residents, as well as an understanding of issues related to changing wants and needs (such as housing tenure and health changes), are important to managers of age-segregated facilities.

Developers. Developers need to be cautious about the importance of where they build retirement facilities. While developments in scenic, rural areas with appealing nearby amenities can act as a pull to the area, if this is a strong influence in the decision to move there may be less satisfaction

with the residence. Developers also need to be aware of the importance of finding managers who have open channels of communication with residents to oversee the day-to-day affairs of these communities.

Consumers of today's independent retirement housing are parents of the baby boom generation. Meeting the wants and needs of the current cohort of housing consumers should contribute to positive evaluations of this type of housing by both retirees and their children. As the baby boomers approach retirement age, there would appear to be a growing market for this type of facility.

Researchers. Several of the measurements of reliability used in this study did not produce high results. In particular, further testing of statements relative to influences on moving used in this survey (such as family and friends) and additional statements relative to these influences is recommended prior to attempting a similar study.

A positive relationship was found between a preference for a homogenous community and residential satisfaction with age-segregated living. This goodness of fit contributes to Kahana's (1982) hypothesis that individuals with certain type of needs are most likely to seek out and be found in environments that are congruent with their needs. If individual needs and want are matched by the characteristics of the setting, this should lead to a sense of satisfaction.

Although the seven categories of influences chosen for this study evolved from focus groups and a theoretical framework, written comments on the surveys suggest that there are other influences on moving that were not addressed in the survey statements (such as moving because of spouse's health or, as one respondent wrote, moving "at my time, rather than being forced to due to aging").

With 19.6% of the variance in residential satisfaction explained by three predictors, it is clear there are other influences on residential satisfaction that were not explained by the variables under investigation.

Recommendations for Further Research

The following recommendations are made for further research regarding the impact of influences on moving on residential satisfaction:

1. Similar research on a larger sample size is warranted to determine if the findings in this study are applicable to a larger population.

This study provided information on residents in one independent living complex. Enlarging the study to participants from several independent living facilities would contribute towards making the results generalizable.

2. A case study in which a more intensive analysis of moving decisions and satisfaction with residence could be explored.

This study provided a beginning foundation for issues related to moving and residential satisfaction in one independent living facility. A case study would permit a more in-depth exploration of individual issues that may help to provide more insight into the complexities of life factors, moving decisions, and residential satisfaction for older adults.

3. A longitudinal study, with a baseline of potential or recent movers.

Cross-sectional studies, such as this one, fail to capture the changes in attitudes and situations of people over time. A longitudinal study could provide information about older adults as they age.

4. A study to assess the effects of demographic factors (such as gender, income, and housing tenure) related to residential satisfaction.

It was not the intent of this study to explore demographic factors, however, they may contribute important information about variances in residential satisfaction.

5. A study to examine what specific factors of a homogeneous community are important to those seeking age-segregated housing.

Seeking a homogeneous community did have a positive relationship with residential satisfaction, however, it was not listed as a strong reason for moving in this study or in other studies. Examining what factors contribute to the appeal of homogeneous communities may contribute to understanding its role in the decision-making process.

6. Research to examine what a change in lifestyle encompasses for older adult movers.

The variable "change in lifestyle" did not have a positive relation with residential satisfaction and it was not a predictor of residential satisfaction. It is referred to, however, in research studies as an influence on moving for amenity seekers. An understanding of lifestyles previous to moving and what changes older adults seek over time may contribute to a better understanding of residential satisfaction.

7. Research to determine the importance of maintaining a neighborhood similar to that from which residents in retirement facilities move.

A change in neighborhood did not have a positive relationship to residential satisfaction and it was not a predictor of residential satisfaction. It may be that there were not enough respondents to

statistically verify this relationship, or that movers were seeking neighborhoods that had similar qualities to the ones they had left.

8. Research to examine the differences in expectations of support between friends and family as a motivation in moving.

The low reliability coefficient for this influence on moving may have been due to a low number of respondents reporting moving to be closer to friends, or because different factors are considered when moving to be near friends versus near family. There are also varying degrees of closeness and support among both friend and family networks which may affect moving decisions.

9. Research to determine prior expectations about maintenance, subsequent needs of residents, and how they were handled relative to satisfaction with maintenance and overall residential satisfaction.

A high number of predictors of satisfaction with maintenance suggest that there may be situational factors that help to explain the variance.

10. Research to determine if influences on moving contribute to residential satisfaction when included with neighborhood, housing, maintenance, and management.

It was the intent of this study to examine the impact of influences on moving on residential satisfaction. These influences accounted for only a small percentage of the variance in residential satisfaction. Combining these influences with other factors used to measure residential satisfaction may contribute to a better explanation of this satisfaction.

11. Research that focuses on single aspects of housing (such as independent living, or assisted care, or nursing centers) in order to more clearly understand the push and pull factors associated with each.

Much of the research in housing for older adults involves studies on residents of facilities with various levels of health care. This makes interpretation of results difficult, as reasons for moving based on assistance needed at any one point in time can be very different.

12. Research that addresses other reasons for moving or staying.

Although there were seven categories examined in this study, there were other reasons for moving given in the written responses of the survey, which may have been the overriding influence on moving. Further explanatory research is recommended.

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APPENDIX A

Letter Announcing Focus Groups

Warm Hearth Village Memorandum

TO: All Residents of Founders Forest
FROM: John Sankey 
DATE: February 24, 1997
SUBJECT: Resident Satisfaction Survey

As a part of our continuing effort to maintain a high quality of living environment at Warm Hearth Village, I have requested that a resident satisfaction survey be conducted.

A researcher from Virginia Tech, Sandra Reynolds, will be in charge of the survey process. Ms. Reynolds has a Masters in Business Administration and is currently pursuing a Ph.D. in Housing, with a Certificate in Gerontology. Ms. Reynolds has a special interest in retirement-age housing, and will be conducting this research as part of her doctoral dissertation.

During the week of March 17 Ms. Reynolds plans to convene three (3) focus groups with a small number of randomly selected Founders Forest residents. These focus group meetings will be followed up with survey questionnaires which will be mailed to all Founders Forest residents later in the spring.

Ms. Reynolds will be contacting a randomly-selected group of residents by telephone during the week of March 3 to invite participation in a focus group. All participants are assured of complete confidentiality. No names of survey participants will be used in any report of the research findings.

Ms. Reynolds has the full approval and support of the Warm Hearth Inc. board of directors and management of Warm Hearth Village. I hope you will cooperate with her, in every way possible, in this research.

APPENDIX B

Telephone Instrument

TELEPHONE INSTRUMENT

Telephone call to request focus group participation:

Mr./Mrs./Ms. _____, my name is Sandra Reynolds, and I am doing research on retirement-age housing. Mr. _____ sent out a memo last week telling you about some meetings of residents that will be held to talk about your opinions about the living environment at _____. Your name was randomly selected to participate in a meeting. I will be conducting those meetings and I wonder if you would be willing to help me out with that research? The date for your group is _____.

We will be meeting at _____, and the meetings should last about one hour. Will that time and date be all right with you?

APPENDIX C

Confidentiality Agreement for Notetakers

Confidentiality Agreement for Notetakers

Due to the confidentiality of the information disclosed during focus group discussions at _____ on March 18 and March 20, 1997, I hereby agree that I will preserve the anonymity and confidentiality of participants, as well as information disclosed by them. I will not share any information from these focus groups with anyone other than the principal investigator, Sandra Reynolds.

APPENDIX D

Informed Consent

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
Informed Consent for Participants
of Investigative Projects

Title of Project Focus Group on Residential Satisfaction

Principal Investigator Sandra Reynolds

I. The Purpose of this Research/Project

You are invited to participate in a study about residential satisfaction. This study involves investigation for the purpose of providing insights into the attitudes, perceptions, and opinions of the participants in order to help understand the factors that lead to residential satisfaction.

II. Procedures

The procedures used in this research are to convene focus groups, with each participant attending one focus group. Participants will be asked to discuss open-ended questions. No risks or discomfort to participants are anticipated. The time necessary for each group will be approximately one and one half hours.

III. Benefits of this Project

Your participation in the project will provide information that may be helpful in planning environments that maximize satisfaction in retirement facilities. No guarantee of benefits has been made to encourage you to participate.

IV. Extent of Anonymity and Confidentiality

Your identity will be kept strictly confidential. The information you provide will not include your name and only a subject number will identify you during analyses and any written reports of the research. At no time will the researcher release the names of any focus group participants without their written consent.

The focus groups will be audio-taped. These tapes will be reviewed by the Investigator, Sandra Reynolds, and will be erased upon completion of this study.

V. Compensation

It is understood that no compensation (money or otherwise) is offered for participation in this study.

VI. Freedom to Withdraw

You are free to withdraw from this study at any time without penalty.

VII. Approval of Research

This research project has been approved, as required, by the Institutional Review Board for projects involving human subjects at Virginia Polytechnic Institute and State University, and by the Department of Housing, Interior Design, and Resource Management.

VIII. Subject's Responsibilities

I know of no reason why I cannot participate in this study.

Signature

IX. Subject's Permission

I have read and understand the informed consent and conditions of this project. I have had all my questions answered. I hereby acknowledge the above and give my voluntary consent for participation in this project.

If I participate, I may withdraw at any time without penalty. I agree to abide by the rules of this project.

Should I have any questions about this research or its conduct, I will contact:

Sandra Reynolds, Investigator

961-0434
Phone

Julia Beamish, Faculty Advisor

231-8881
Phone

Tom Hurd, Chair, IRB, Research Division

231-6077
Phone

APPENDIX E

Questions for Focus Groups

QUESTIONS FOR FOCUS GROUPS

- 1) Tell me about what made you decide to move here
- 2) Would you consider, or had you considered, moving in with relatives/children?
- 3) What were your expectations here?
- 4) What do you like about this facility? (probe on this question and question 5 about floor plan, landscaping, fellow residents--friendliness and privacy, social activities, value for money, maintenance)
- 5) What do you wish was different?
- 6) How would you describe management?
- 7) If you were going to describe this facility to potential residents, what would you tell them?

APPENDIX F
Survey Instrument

**** SECTION I. ****

Listed below are some factors that influence people's decisions to move from their homes to retirement communities. Please think back to the reasons that influenced your decision to move. Put a check mark in the box that represents the amount of influence each statement had on your decision, ranging from **None** to **Great**:

		<u>Amount of Influence</u> <u>on Decision to Move</u>			
		None		Great	
		1	2	3	4
1	THE UPKEEP OF THE EXTERIOR OF MY HOUSE AND GROUNDS WAS TOO DEMANDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	I GOT TIRED OF HAVING TO DEPEND ON OTHERS TO HELP WITH THE UPKEEP OF MY HOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	THE SIZE OF MY HOME WAS TOO BIG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	THE FLOOR PLAN OF MY HOME MADE GETTING AROUND DIFFICULT (I.E., STAIRS HARD TO CLIMB)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	I MISSED THE SOCIAL CONTACTS I HAD AT WORK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	MY SOCIAL NETWORK WAS DECLINING (FRIENDS/RELATIVES MOVED OR PASSED AWAY)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	I WANTED A CHANGE IN MY LIFESTYLE.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	I WANTED A CHANGE IN NEIGHBORHOOD (I.E., NEIGHBORHOOD DECLINING, POLLUTION, CONGESTION,).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	MY HEALTH WAS A CONCERN.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	I WANTED A SAFER NEIGHBORHOOD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	I WANTED TO MOVE CLOSER TO FAMILY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	I WANTED TO MOVE CLOSER TO FRIENDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	I WANTED TO KNOW THAT MY HEALTH CARE NEEDS WOULD BE TAKEN CARE OF IN THE FUTURE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	I WANTED TO MAINTAIN MY INDEPENDENCE FOR AS LONG AS POSSIBLE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	I WANTED TO MOVE TO AN AREA WITH A LOWER COST OF LIVING COMPARED TO WHERE I WAS LIVING BEFORE.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	I WANTED TO LIVE IN A RURAL ENVIRONMENT.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	I WANTED TO LIVE NEAR MOUNTAINS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<u>Amount of Influence</u> <u>on Decision to Move</u>			
	None		Great	
	1	2	3	4
18 I WANTED TO MOVE HERE BECAUSE OF THE NEARBY AMENITIES (I.E., SHOPPING, MEDICAL, UNIVERSITY)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 I WANTED TO LIVE NEAR PEOPLE MY AGE WHO WOULD BE SUPPORTIVE AND UNDERSTANDING OF THINGS THAT ARE IMPORTANT TO ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 I WANTED TO BE FREE OF HOME MAINTENANCE CHORES/REPAIRS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If there were reasons for your move not listed above, please comment:

21 SEVERAL FACTORS MAY HAVE INFLUENCED YOUR DECISION TO MOVE HERE. IF YOU HAD TO PICK YOUR TOP THREE REASONS , WHICH THREE WOULD YOU SELECT? PLACE A "1" "2" AND "3" ON THE LINES NEXT TO YOUR THREE CHOICES, IN ORDER OF IMPORTANCE:

- _____ MORE SECURE ENVIRONMENT (QUIET, SAFE)
- _____ MORE SUPPORTIVE NEIGHBORHOOD (NEIGHBORS SIMILAR AGE, BACKGROUNDS;
MORE SOCIAL CONTACTS)
- _____ DECREASED MAINTENANCE
- _____ ON-SITE HEALTH CARE SERVICES
- _____ FRIENDS/RELATIVES IN AREA
- _____ ENVIRONMENTAL AMENITIES (CLIMATE, MOUNTAINS, RURAL AREA, UNIVERSITY)
- _____ CHANGE IN LIFE STYLE
- _____ OTHER

**** SECTION II. ****

The following statements concern the retirement community where you now live. Please give your personal opinion about these statements. Place a check mark in the appropriate box:

	DISAGREE=D	TEND TO DISAGREE=TD	TEND TO AGREE=TA	AGREE=A
	D	TD	TA	A
1 THE POLICIES AND PROCEDURES HERE ARE CLEAR TO ME.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 I FEEL CONFIDENT ABOUT THE FINANCIAL FUTURE OF THIS FACILITY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 I BELIEVE THAT THE FEES I PAY HERE ARE BEING WELL SPENT.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 I BELIEVE THE FUTURE PLANS FOR THE NURSING CENTER WERE EXPLAINED CLEARLY TO ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THE FOLLOWING QUESTIONS ARE ABOUT THE FOUNDERS FOREST TOWNHOMES:

5 I WAS SATISFIED WITH THE CHOICES OF APARTMENT FLOOR PLANS AVAILABLE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 QUALITY DESIGN AND CONSTRUCTION IS EVIDENT IN THESE TOWNHOMES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	DISAGREE=D	TEND TO DISAGREE=TD	TEND TO AGREE=TA	AGREE=A
	D	TD	TA	A
7 THE AMOUNT OF CLOSET SPACE I HAVE HERE FITS MY NEEDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 THE KITCHEN SPACE I HAVE HERE FITS MY NEEDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 MY BATHROOM IS <u>UNSAFE</u> FOR ME TO USE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 THE EMERGENCY CALL SYSTEMS HERE ARE IMPORTANT TO ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 THE TOTAL AMOUNT OF ROOM IN MY TOWNHOME FITS MY NEEDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 I CAN MAINTAIN A COMFORTABLE TEMPERATURE IN MY HOME . . .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 THESE TOWNHOMES ARE DRAFTY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 I HEAR TOO MUCH SOUND FROM ADJACENT TOWNHOME UNITS . .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 I AM COMFORTABLE IN MY PRESENT RESIDENCE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 I BELIEVE THESE TOWNHOMES ARE A GOOD VALUE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 MONTHLY FEES ARE HIGH FOR THE SERVICES COVERED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 MONTHLY FEES ARE A FINANCIAL BURDEN TO ME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 I THINK THE ENTRANCE FEES HERE ARE REASONABLE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>THE FOLLOWING QUESTIONS ARE ABOUT THE FOUNDERS FOREST NEIGHBORHOOD:</u>				
20 PEOPLE RESPECT MY PRIVACY HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21 I HAVE GOOD NEIGHBORS IN THESE TOWNHOMES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22 THIS NEIGHBORHOOD IS VERY PEACEFUL AND QUIET	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23 I FIND THIS NEIGHBORHOOD TO BE AN INTERESTING PLACE TO LIVE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24 I HAVE FOUND LIVING NEAR PEOPLE IN MY SAME AGE GROUP TO BE BORING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25 I FEEL SAFE AND SECURE IN THIS NEIGHBORHOOD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26 THIS NEIGHBORHOOD IS CONVENIENT TO PLACES THAT I GO FOR OUTSIDE SERVICES (SUCH AS BANK, GROCERY, SHOPPING). .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27 I WISH MORE SOCIAL ACTIVITIES WOULD BE PROVIDED HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28 I WISH I HAD MORE SOCIAL INTERACTION WITH PEOPLE HERE . . .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29 I WOULD GO OUT MORE IF THE VAN SERVICE WAS AVAILABLE FOR MORE OUTINGS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30 PLEASE CIRCLE ONE OF THE FOLLOWING:

- A. I LIKE LIVING HERE AND DO NOT PLAN TO MOVE AGAIN (UNLESS IT IS FOR HEALTH-RELATED REASONS)
- B. I THINK ABOUT MOVING FROM HERE, BUT IT WOULD JUST BE TOO COMPLICATED AT THIS TIME IN MY LIFE
- C. I HAVE REGRETTED MOVING HERE, AND WISH I COULD FIND ANOTHER PLACE TO MOVE
- D. I AM ACTIVELY LOOKING FOR ANOTHER PLACE TO MOVE (NOT FOR HEALTH-RELATED REASONS)

COMMENTS: _____

****** SECTION III. ******

Now I would like you to give your personal opinion about the following statements concerning maintenance and management. Please place a check mark in the appropriate box:

	DISAGREE=D	TEND TO DISAGREE=TD	TEND TO AGREE=TA	AGREE=A
1 THE LANDSCAPING IN THIS NEIGHBORHOOD IS WELL MAINTAINED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 THE OUTSIDE APPEARANCE OF THESE TOWNHOMES IS WELL MAINTAINED.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 I AM PROUD TO HAVE PEOPLE VISIT ME HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 I AM SATISFIED WITH THE QUALITY OF REPAIRS INSIDE MY TOWNHOME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 I WISH MAINTENANCE PERSONNEL WOULD CONTACT ME BEFORE COMING OVER TO DO REPAIR WORK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 MAINTENANCE REQUESTS ARE HANDLED EFFICIENTLY HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 IF I COMPLAIN ABOUT MAINTENANCE PROBLEMS, I WORRY THAT MANAGEMENT WILL THREATEN TO RAISE FEES.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 EXTERIOR MAINTENANCE OF THESE TOWNHOMES IS IMPORTANT TO MANAGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 MAINTENANCE OF LANDSCAPING IS IMPORTANT TO MANAGEMENT .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 INSIDE MAINTENANCE IS IMPORTANT TO MANAGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 NEEDS AND CONCERNS OF RESIDENTS ARE IMPORTANT TO MANAGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	DISAGREE=D	TEND TO DISAGREE=TD	TEND TO AGREE=TA	AGREE=A
	D	TD	TA	A
12 THERE ARE OPEN CHANNELS OF COMMUNICATION BETWEEN RESIDENTS AND MANAGEMENT HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 INFORMATION GIVEN BY MANAGEMENT IS GENERALLY ACCEPTED BY RESIDENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 MANAGEMENT KNOWS AND UNDERSTANDS THE PROBLEMS OF THE RESIDENTS WELL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 MANAGEMENT IS FRIENDLY AND TREATS PEOPLE WITH RESPECT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16 THE RESIDENTS AS A GROUP SUPPORT THE EFFORTS OF MANAGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17 MANAGEMENT IS GENERALLY ACCESSIBLE TO RESIDENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18 MANAGEMENT GENERALLY ANSWERS QUESTIONS IN A SATISFACTORY MANNER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19 RESIDENTS ARE KEPT WELL INFORMED ABOUT THE DECISIONS THAT ARE MADE HERE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20 THE RESIDENT COUNCIL HAS ACCESS TO MANAGEMENT TO PRESENT RESIDENT CONCERNS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS: _____

**** SECTION IV. ****

Now I would like to ask you some questions about yourself to help interpret the results of this study:

- 1 HOW OLD WERE YOU ON APRIL 30, 1997?
- 2 ARE YOU FEMALE? _____ MALE?
- 3 WHICH OF THE FOLLOWING BEST DESCRIBES YOUR HEALTH WHEN YOU MOVED HERE?
(CIRCLE ANSWER)
 - A. HEALTH LIMITED ACTIVITIES MOST OF THE TIME
 - B. HEALTH LIMITED ACTIVITIES SOME OF THE TIME
 - C. HEALTH RARELY LIMITED ACTIVITIES
 - D. HEALTH NEVER LIMITED ACTIVITIES
- 4 WHICH OF THE FOLLOWING BEST DESCRIBES YOUR CURRENT HEALTH? (CIRCLE ANSWER)
 - A. HEALTH LIMITS ACTIVITIES MOST OF THE TIME
 - B. HEALTH LIMITS ACTIVITIES SOME OF THE TIME
 - C. HEALTH RARELY LIMITS ACTIVITIES
 - D. HEALTH NEVER LIMITS ACTIVITIES

- 5 DO YOU DRIVE A CAR? YES _____ NO
- 6 CURRENT MARITAL STATUS (CIRCLE ANSWER)
A. MARRIED
B. WIDOWED
C. OTHER
- 7 IF YOU CIRCLED "B" IN NUMBER 6, WHAT YEAR DID YOU BECOME WIDOWED?
- 8 NUMBER OF LIVING CHILDREN
- 9 PLEASE CIRCLE THE HIGHEST SCHOOLING YOU COMPLETED:
A. BETWEEN FIRST AND NINTH GRADES
B. SOME HIGH SCHOOL
C. HIGH SCHOOL DIPLOMA
D. COLLEGE DEGREE
E. GRADUATE DEGREE
F. OTHER (PLEASE LIST)
- 10 WHAT TYPE OF FULL TIME OCCUPATION DID YOU MOST RECENTLY HAVE?
A. PROFESSIONAL, TECHNICAL
B. MANAGERIAL
C. CLERICAL
D. CRAFTS, SERVICE WORKER, LABORER
E. HOMEMAKER
F. OTHER (PLEASE LIST)
- 11 WAS THE PRIMARY WAGE EARNER IN YOUR HOUSEHOLD RETIRED FROM A FULL TIME OCCUPATION WHEN YOU MOVED INTO THIS TOWNHOME?
YES _____ NO
- 12 IF YOU ANSWERED NO TO #11, IS THE PRIMARY WAGE EARNER CURRENTLY RETIRED FROM A FULL TIME OCCUPATION? YES _____ NO
- 13 APPROXIMATELY HOW MANY TIMES HAVE YOU CHANGED RESIDENCES IN YOUR ADULT LIFE?
- 14 APPROXIMATELY HOW LONG DID YOU LIVE AT YOUR LAST RESIDENCE?
YEARS
- 15 WHAT TYPE OF RESIDENCE DID YOU LAST LIVE IN?
A. SINGLE FAMILY HOME
B. RENTAL UNIT
C. CONDOMINIUM
D. OTHER
- 16 HOW WOULD YOU DESCRIBE THE COMMUNITY YOU LIVED IN PRIOR TO COMING HERE?
A. CITY
B. SUBURBAN AREA
C. SMALL TOWN
D. COUNTRY
- 17 APPROXIMATELY HOW LONG DID YOU LIVE IN YOUR LAST COMMUNITY? _____ YEARS

18 APPROXIMATELY HOW MANY MILES IS IT FROM YOUR PREVIOUS COMMUNITY TO WHERE YOU LIVE NOW?

19 HOW DOES THE COST OF LIVING WHERE YOU LIVED BEFORE COMPARE TO HERE?

- A. HIGHER HERE
- B. LOWER HERE
- C. ABOUT THE SAME
- D. I LIVED IN BLACKSBURG AREA PRIOR TO MOVING IN HERE

20 WHAT WAS YOUR MAIN SOURCE OF INFORMATION ABOUT THIS RETIREMENT COMMUNITY?

- A. NEWSPAPER OR RADIO ADVERTISEMENT
- B. CONTACT WITH MARKETING STAFF
- C. CHILDREN
- D. FRIENDS OUTSIDE THIS RETIREMENT COMMUNITY
- E. FRIENDS LIVING IN THIS RETIREMENT COMMUNITY
- F. OTHER

21 PRIOR TO MOVING TO THIS RETIREMENT COMMUNITY, I (CIRCLE ALL THAT APPLY)

- A. WAS A RESIDENT IN THE BLACKSBURG/NEW RIVER VALLEY AREA
- B. HAD VISITED HERE BEFORE
- C. ATTENDED COLLEGE HERE
- D. HAD NOT VISITED, OTHER THAN TO LOOK AT THIS FACILITY

22 HOW LONG HAVE YOU LIVED IN THIS RETIREMENT COMMUNITY?

Is there anything else you would like to add? If so, please use this space for that purpose.


THANK YOU FOR YOUR ASSISTANCE WITH THIS SURVEY!!

*****PLEASE RETURN IN THE ENCLOSED ENVELOPE*****

APPENDIX G

Letter Announcing Mail Survey

**Warm Hearth Village
Memorandum**

TO: All Residents of Founders Forest
FROM: John Sankey 
DATE: May 16, 1997
SUBJECT: Resident Satisfaction Survey

On February 24, 1997 I wrote to you about the resident satisfaction survey which will be conducted. Those of you who were here then will remember that this survey is being done as a part of our continuing effort to maintain a high quality of living environment for all residents at Warm Hearth Village.

You will also remember that a researcher from Virginia Tech, Sandra Reynolds, will be in charge of the survey process. Ms. Reynolds has a Masters in Business Administration and is currently pursuing a Ph.D. in Housing, with a Certificate in Gerontology. Ms. Reynolds has a special interest in retirement-age housing, and will be conducting this research as part of her doctoral dissertation.

During the month of March, Ms. Reynolds convened several small focus groups with a small number of randomly selected Founders Forest residents. The purpose of these focus group meetings was to provide information to help Ms. Reynolds design the survey questionnaire.

The questionnaire design phase is now complete and Ms. Reynolds is ready for the next step in the survey process. **Next week she will mail a survey questionnaire to every resident in Founders Forest.**

Ms. Reynolds has the full approval and support of the Warm Hearth Inc. board of directors and management of Warm Hearth Village. I hope you will cooperate with her in this research. Your personal opinions are very important to us and only by knowing the opinions of all residents can we make the best decisions possible. Therefore, I hope that **every one of you** will take advantage of this opportunity to give us feedback by completing and returning the survey questionnaire to her as soon as possible.

Thank you for your help.

APPENDIX H

Cover Letter for Mail Survey

May 21, 1997

Name
Street Address
City, State, Zip Code

Recently you received a letter from John Sankey concerning a survey that would be conducted to evaluate your living environment. I have designed a questionnaire for that purpose as part of my doctoral dissertation. I am also interested in what influenced your decision to move to this retirement community. The information that you share may help others to understand why people seek out this type of retirement housing, and what you value as a resident.

You may be assured of complete confidentiality as a participant. The questionnaire has an identification number for tabulation purposes only, so that your name may be checked off the mailing list when your questionnaire is received. No names of survey participants will be used in any report of the research findings.

Your own personal opinion is very valuable, therefore, please fill out this questionnaire without consultation from anyone else--and during a time (approximately 15 to 20 minutes) when you will be free of interruptions. When you are finished, place the completed questionnaire in the attached, postage-paid envelope, and drop it in the mail to me.

Should you have any questions at all, please call me at 961-0434.

Thank you for your assistance!

Sincerely,

Sandra Reynolds

Enclosures

APPENDIX I

Follow-up Postcard

FOLLOW-UP POSTCARD

May 30, 1997

Just over a week ago, a questionnaire seeking your evaluation of the Founders Forest townhomes and neighborhood was mailed to you. If you have already returned it, please accept my sincere thanks. If not, please do so today. Your evaluation is very important to include in the study so that the results can accurately reflect the opinions of Founders Forest residents.

If you have misplaced your questionnaire, please call me (961-0434) and I will get another one to you right away.

Thank you!

Sandra Reynolds

APPENDIX J

Data and Formatting Plan

DATA AND FORMATTING PLAN

<u>Statement</u>	<u>Variable</u>	<u>Coding</u>
Section 1: 1-20	Independent variables	4 point Likert
Section 1: 21	Independent variable (percentages)	1 = 3 2 = 2 3 = 1 0 = not checked 7 = checked, no #
given Section II: 1-4	Not analyzed in this study	
Section II: 5-19	Residential Satisfaction Housing Section	4 point Likert Reverse code: #9, 13, 14, 17, 18
Section II: 20-28	Residential Satisfaction Neighborhood Section	4 point Likert Reverse code: #24, 27, 28
Section II: 29	Not analyzed in this study	
30	Not analyzed in this study	
Section III: 1-4, 6 (5 eliminated)	Residential Satisfaction Maintenance Section	4 point Likert
Section III: 7-20	Residential Satisfaction Management Section	4 point Likert Reverse code: #7
Section IV: 1	Age	Direct
2	Gender	1 = male 2 = female
3, 4	Health	1 = limits most of time 2 = limits some of time 3 = rarely limits 4 = never limits
5	Not analyzed in this study	
6	Marital status	1 = married 2 = widowed 3 = other
7	Not analyzed in this study	
8	Not analyzed in this study	
9	Education	1 = Between 1st & 9th grades 2 = Some H.S. 3 = H.S. diploma 4 = College degree

DATA AND FORMATTING PLAN (Cont.)

<u>Statement</u>	<u>Variable</u>	<u>Coding</u>
		5 = Grad. degree 6 = Other
10	Occupation	1 = Professional 2 = Managerial 3 = Clerical 4 = Crafts, service 5 = Homemaker 6 = Other
11	Retirement status, upon moving in	1 = No 2 = Yes 8 = N/A
12	Retirement status, current	1 = No 2 = Yes 8 = N/A
13	# times changed residences	Direct
14	Previous length of residency	Direct
15	Type of residence	1 = Single family 2 = Rental unit 3 = Condominium 4 = Other
16	Type of previous community	1 = City 2 = Suburban 3 = Small town 4 = Country
17	Previous community residency	Direct
18	Distance here	Direct
19	Cost of living	1 = Higher here 2 = Lower here 3 = About same 4 = B'burg resident
20	Information source	1 = Media 2 = Marketing staff 3 = Children 4 = Friends outside 5 = Friends inside 6 = Other
21	Prior community	0 = Circled 1 = Not circled
22	Length of residency	Direct

APPENDIX K

Selected Comments Written by Residents

Selected Comments Written by Residents

The questionnaire contained space at the end of each of the three sections for respondents' comments about that section. At the end of the survey there was a space for additional comments. Forty-nine percent of respondents made written comments. Misspelled words were corrected, but nothing was edited. The identification number of each respondent used for tabulation is given below. Representative comments were selected, and categorized by section as follows:

I. Influences on Moving

<u>ID #</u>	<u>Comments</u>
12	It is well and attractively developed. The approach is marvelous. The air exhilarating.
49	Husband had cancer; wanted to be well situated in event of his death. Lived in Blacksburg prior to move, so friends and familiar surroundings a plus (good place to care for a sick person)
70	Always on lookout for a better arrangement and would take advantage of one if available.
77	Having so much money tied up in a life lease contract makes it impossible to move.
50	Rental home was sold
39	Didn't want our children to have care of elderly parents
12	Wanted a more natural environment. Liked forest with a plan for trails
13	I wanted to move at my time, rather than being forced to due to aging
45	There was no nearby senior resident community in the area where we lived comparable to [the Village]
71	Partial refund of life-lease fee was an important factor in decision to move here
56	More time for travel
35	Legal issues at previous home

- 67 Climate, positive attitude of people in this area.
Friendliness of people, and the "caring" of people
- 89 People's attitude toward life in general, which is
positive in spite of personal adversities. Less stress
on material needs, more on quality of life
- II. Housing, Neighborhood
- 12 The environment. Trees, all kinds of flowers and
greenery are life giving
- 73 I think this area and atmosphere is as favorable as any
place I could find
- 89 This is a lovely rural setting
- 39 Top management should spend more time with contractor
while construction is in progress to eliminate many of
the annoyances to new residences in townhomes. Perhaps
this would apply to the health center as well
- 40 Sharp differences in a day's temperature often makes it
a little difficult to stay comfortable
- 44 Management didn't provide adequate supervision in house
construction, resulting in various building faults, some
of which have not been corrected. When new houses were
constructed, house and grounds in earlier units were
neglected
- 36 Improve bathroom safety measure in Dogwood Circle
- 74 Windows are difficult to open. Toilet faucet knobs
difficult to operate. Poor water flushing toilet design.
Poor humidifier system for winter comfort
- 4 I miss having paved sidewalks from one section of
Founders Forest to another. I wish more trees were left
around new houses
- III. Maintenance, Management
- 70 Maintenance of essential items, such as changing air
filters, cleaning humidifiers, washing outside windows,
attention to deck and walkway floors, are all neglected-
often ignored. Insulating in ceilings should be

- redistributed and added. "Cheap" practice such as purchasing lower wattage light lobes is ridiculous
- 50 Repeated requests for some planting in large bare area
in front yard not successful
- 39 Maintenance of existing landscape is excellent. The landscape itself is not complete one year after our life-lease payments were completed! Decks and walkways not stained. Windows never cleaned on outside--full of paint and dirt. Appliance repairs are excellent. Home settling and squeaking floor still not fixed
- 46 The majority of staff are helpful, caring people but their ability to help is restricted by the decisions made by the President and Dr. Kroontje. Even when they hear of our complaints, they don't care and do not make an effort to find a solution. They seem to forget that they are supposed to be working for us, not the other way around
- 89 Not enough attention to interior maintenance concerns of residents; slow to react to anything but emergencies
- 59 I would like snow removal on back deck to free floor to assure being able to exit in case of fire.
- 53 Too much time and maybe expense being devoted to landscaping, with such things as drainage, hard surface walks to basements and/or crawl spaces left to for relative long periods of time. These two things should really be taken care of prior to occupancy
- 76 I am concerned about waste of materials and carelessness of workers--much planting goes on but no weeding and watering takes place; plants die and keep on being replaced
- 6 Trail system has a low priority here
- 70 Landscape maintenance may be important to management, but that is not reflected in actuality. Oakland Square is not properly maintained. Top management "speaks down" to residents and is not respectful. Management personnel are rarely, if ever, seen in the areas of townhomes

- 46 The president of [the Village] is out-of-touch with how we feel and, unless we agree to everything, he is snappish and arrogant. He stays out of sight because he doesn't want to hear any complaints
- 57 Chief Executive of staff exhibits poor employee relations and poor resident relations' skills
- 39 Middle management has been excellent, but they are not able to make decisions! Top management (the decision maker) is not available--doesn't even try to be accessible to life-lease holders
- 94 Listen beautifully to our unmet needs, but usually, nothing happens
- IV. Additional comments
- 12 I wish I had known about this place long ago
- 44 Management hasn't set up a reserve fund for refunding the home investment for those leaving the community or to the estate of those deceased, as recommended by the auditor
- 38 Broken promises, misleading, nonprofessional
- 91 We owe a debt of gratitude to Mr. & Mrs. Kroontje for their foresight in seeing the need for this retirement community
- 35 We feel very secure here. The staff is wonderful, the community nice. We are very well satisfied with the conveniences and the caring people we have met
- 67 More activities for men are needed, such as "all men outings." I feel that men do not have enough to keep them busy and hence, appear to complain about minor things, whereas the women are more social and complain less and are very happy here
- 17 Not economically sound to leave, otherwise I would consider it
- 21 Residents fear continual risks of escalating rates

- 94 I'm glad to be here, despite all the noise and hassle of trees going down, houses, perhaps, or no doubt, going up. You have all constructed and tried to maintain a gorgeous place. You deserve great credit
- 21 We need to advertise in high cost of living areas where people are looking for low-cost housing with efficient services
- 81 There should be at least one resident on the board of directors. Resident executive council meetings should be held each month. Executive council should keep informed on management's work
- 48 Even though this sounds negative in many ways I feel I'm a pretty positive person. I really have grown to love living in Blacksburg because of the people I have met and the cultural opportunities. There is nothing wrong with [the Village] that can't be fixed with some changes in all our attitudes. We can fix it if we all work together towards that goal--but time is running out

CURRICULUM VITAE

Sandra G. Reynolds

Personal data: Born in Bremerton, Washington, May 1, 1946; widowed, three children - Seleta, David Lee, and Hayley.

Education: B.A. in English, University of Washington, Seattle, 1967; M.A. in English, University of Mississippi, Oxford, 1974; B.S. in Nursing, University of Mississippi, Jackson, 1989; M.B.A., Millsaps College, Jackson, 1994; Ph.D. in Housing, Virginia Polytechnic Institute and State University, Blacksburg, 1997.

Honors and Awards: Tuition Scholarship, Virginia Tech Graduate School; Savannah Day Scholarship; Phi Kappa Phi; Kappa Omicron Nu; Sigma Phi Omega.

Professional Associations: American Association of Housing Educators.