



ORANJ Plenary

Resident Satisfaction Surveys

A Case Study

October 19, 2016





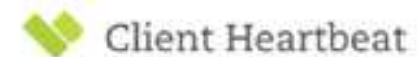
A Show of Hands





Resident Satisfaction Survey – Why?

Let's take most of the money we would've spent on paid advertising and paid marketing and instead of spending it on that invest it in the customer experience/customer service and then let our customers do the marketing for us through word of mouth.

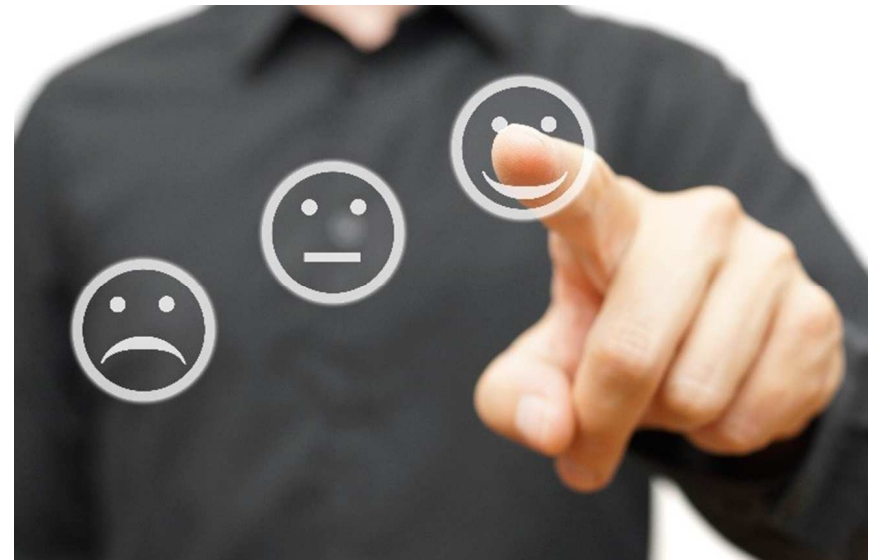


Tony Hsieh
Zappos



Resident Satisfaction Survey – Why?

- ❑ Operational Viewpoint
 - What is Working and What is Not
 - Communication
 - Inform and Reeducate
 - Understanding the Drivers to Satisfaction
- ❑ Long-Range Planning
 - What We Can Build Upon

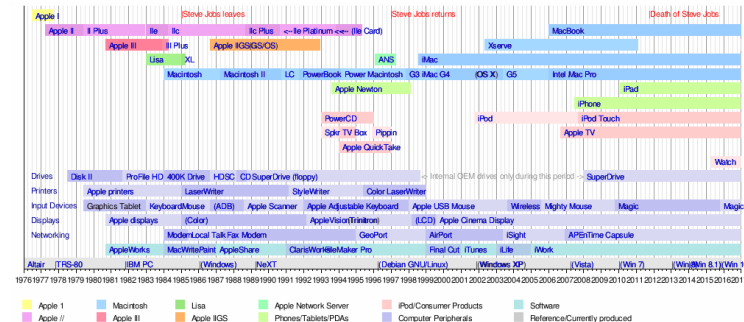




Resident Satisfaction Survey – How

□ Elements

- Planning & Interviewing
- Survey Execution
- Crunching the Numbers
- Analyze Results
- Form Work Teams
- Implement Changes
- Analyze Results
- Continue to Evolve Solutions
- d/c Task Forces





Resident Satisfaction Survey – How

- ❑ Planning & Interviewing (Board & Staff)
 - Third-Party - ProMatura (many others)
 - ❑ Basic Outline
 - ❑ Benchmarking
 - ❑ Crunching the Numbers
 - ❑ Analysis
- ❑ Coordinating Task Force - Staff & Residents
 - Personalize the Questions
 - Participation Rate
 - Communication
 - Analysis
 - Follow-up





Resident Satisfaction Survey – How

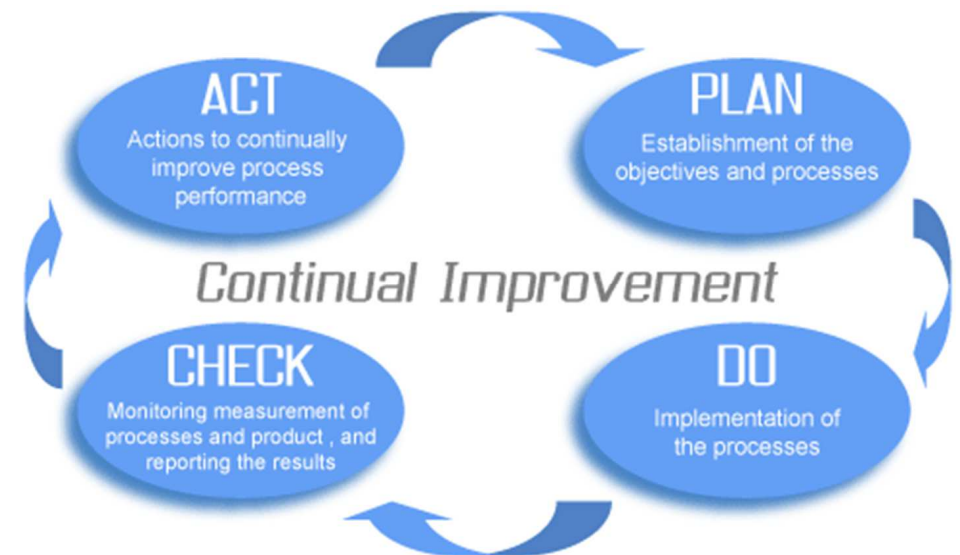
□ Regular Cycle - 2 or 3 Years

■ Year 1

- Conduct Survey
- Compile Results
- Analyze
- Begin Task Forces

■ Year 2-3

- Implement Changes
- Monitor Results
- Continue Refinement





Resident Satisfaction Survey – How

□ Format

- Written
- Volunteers to Orally Complete Survey
- Online Version





ML Resident Satisfaction Survey

□ Timeline

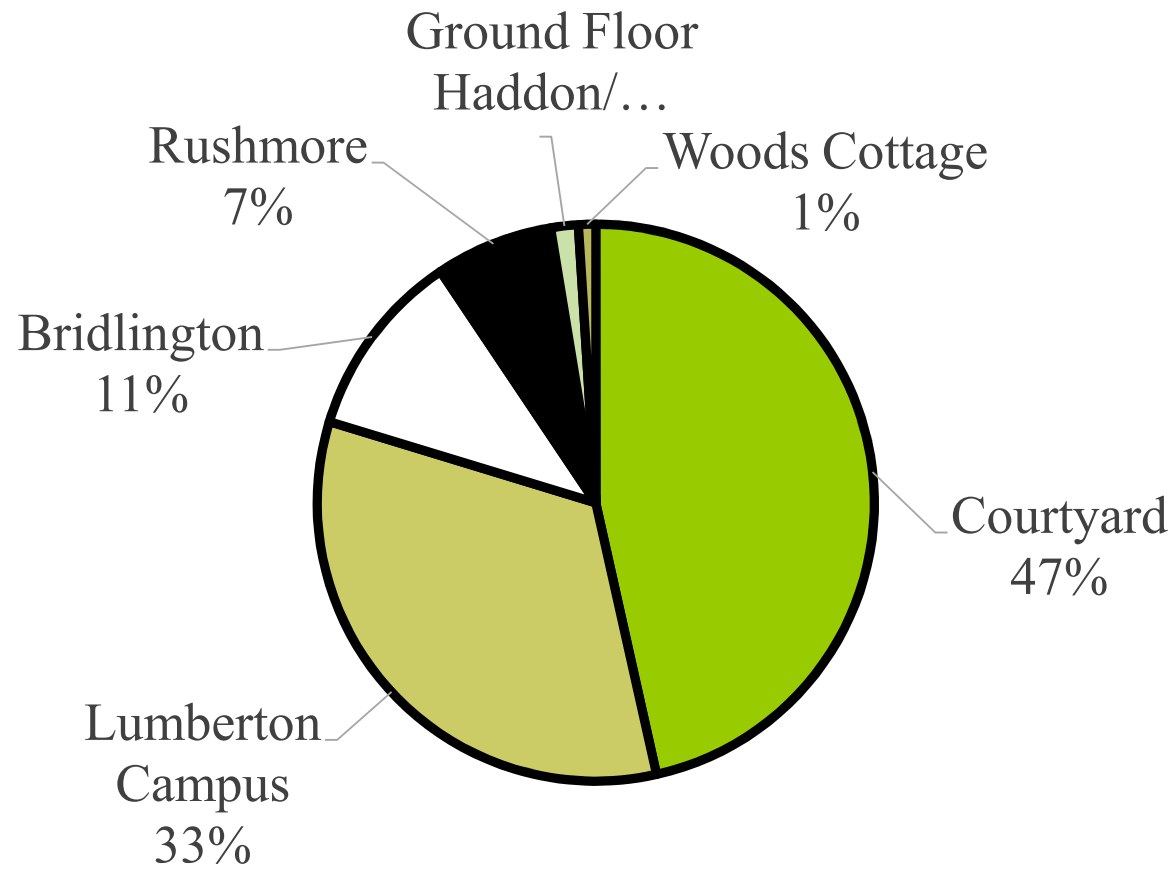
- Planning & Interviewing Early 2014
- Conducted Fall 2014
 - Overall Very Positive Feedback
 - “Too Good Not to be Better!”
- Formed Quality Improvement Teams - Spring 2015
- Quality Improvement Team Meetings
 - July 2015 – June 2016
- Next Survey – Fall 2017

Number of Completed Survey and Response Rate to Quality Improvement Survey by Respondent Group

Respondent Group	Number Distributed	Number Completed	Response Rate	Margin of Error (95% confidence)
Residential Living Residents	471	403	86%	+/- 1.9%
Assisted Living Residents	71	44	62%	+/- 9.2%
Assisted Living Family	50	17	34%	+/- 19.5%
Skilled Nursing Residents	18	3	17%	+/- 53.2%
Skilled Nursing Family	26	9	35%	+/- 26.9%
Skilled Nursing (Total)	52	12	27%	+/- 25.1%
Total	636	476	75%	--



Residential Living Residence Location

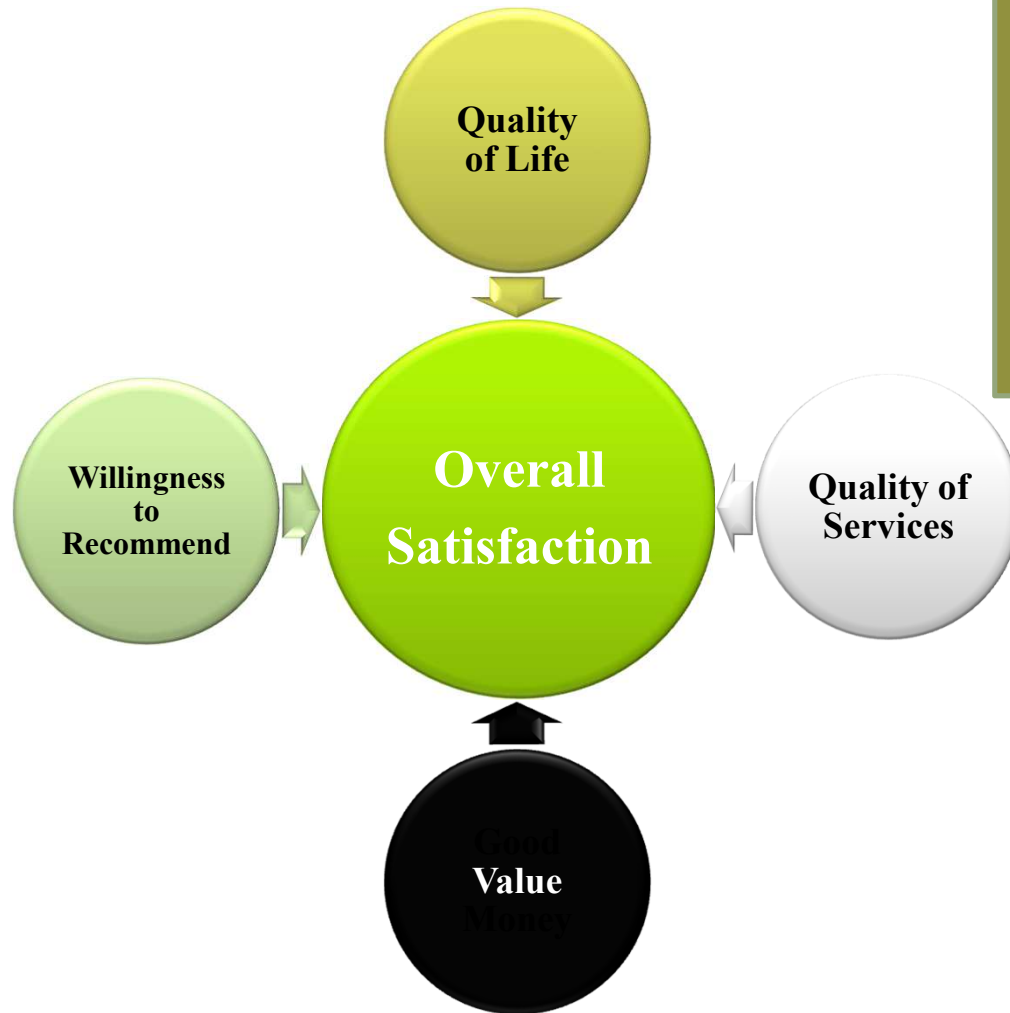


Residential Living

Elements of Overall Satisfaction



MEDFORD LEAS



Overall Satisfaction was calculated by averaging the scores on Quality of Life, Quality of Services, Good Value for Money, and Willingness to Recommend.

Residential Living Elements of Overall Satisfaction



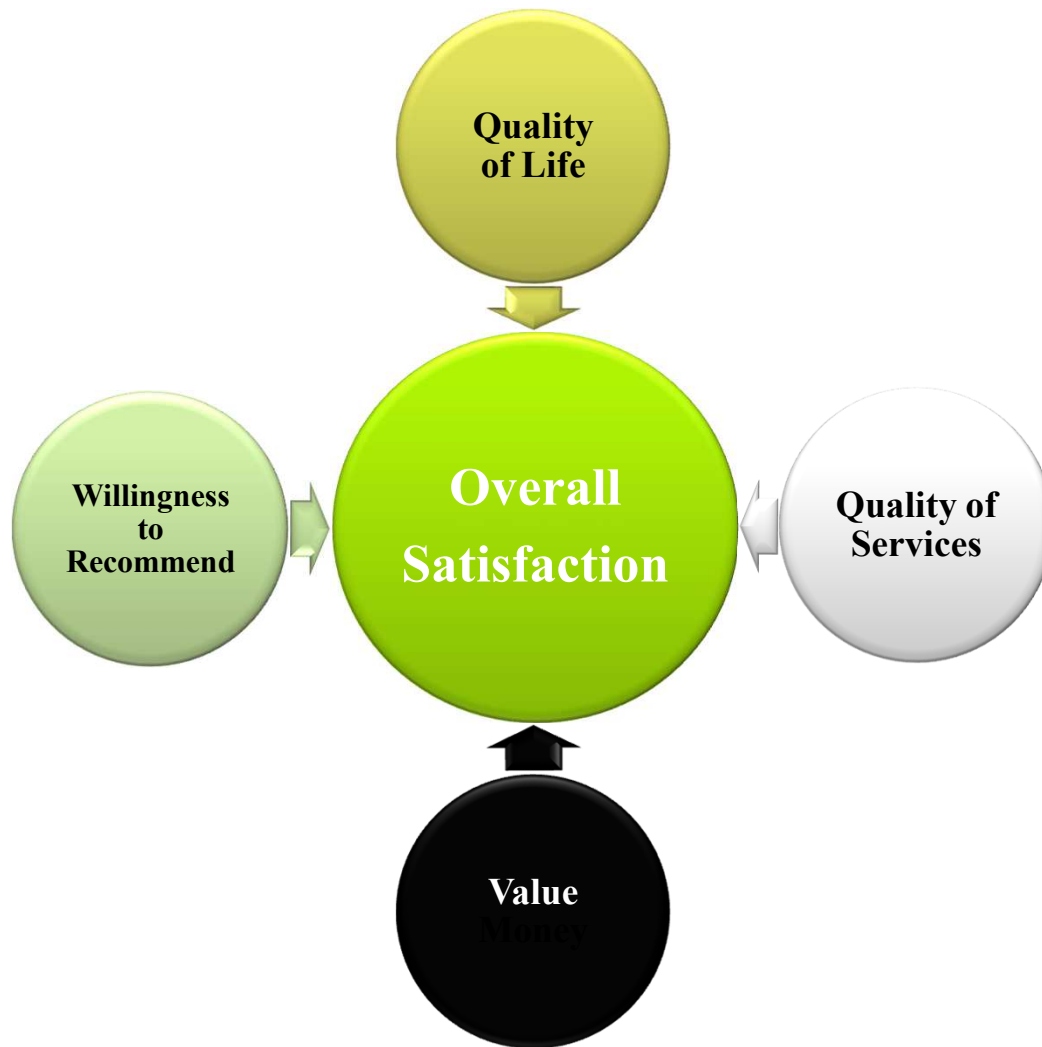
Residential Living Resident Satisfaction

Questions in Overall Satisfaction	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I am satisfied with my quality of life at Medford Leas					
I am satisfied with the quality of services at Medford Leas					
Medford Leas offers me good value for my money					
I am willing to recommend Medford Leas to a friend					

Assisted Living Elements of Overall Satisfaction



MEDFORD LEAS



Overall Satisfaction was calculated by averaging the scores on Quality of Life, Quality of Services, Good Value for Money, and Willingness to Recommend.

Assisted Living Elements of Overall Satisfaction



Assisted Living Resident Satisfaction

Questions in Overall Satisfaction	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
My quality of life at Medford Leas					
Quality of services at Medford Leas					
Good value for my money					
Willing to recommend Medford Leas					



Medford Leas

PRIMARY DRIVERS OF RESIDENT SATISFACTION

Residential Living

Attribute	Strongest Primary Drivers				
	Stronger Impact----->Less				
Overall Satisfaction	Happy & Fulfilling Lives	Competent Staff	Confident Living at ML	Strong Financial Position	
Quality of Life	Sense of Belonging	Confident Living at ML	Strong Financial Position	Residence Suits Me	
Quality of Services	Competent Staff	Number of Friends			
Good Value for the Money	Strong Financial Position	Communication: Due Consideration	Confident Living at ML	Residence Suits Me	Happy & Fulfilling Lives
Willingness to Recommend	ML Runs Smoothly	Be Myself at ML	ML Promotes Good Health	Communication: Timely & Informative	Happy & Fulfilling Lives
Feeling "At Home"	Sense of Belonging	ML Runs Smoothly	Be Myself at ML	Important Part of ML	
Sense of Contentment	Sense of Belonging	Look Forward to Meal at ML	Sense of Control		
Confidence in Knowing ML is Right Place	Sense of Belonging	Be Myself at ML	Confident Living at ML		

Residential Living

Ratings of Primary Drivers of Resident



Medford Leas Ratings of Primary Drivers of Residential Living Satisfaction (Sorted by Strength of Impact)

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I have a sense of belonging at Medford Leas.					
I feel confident living at Medford Leas.					
I believe Medford Leas has a strong financial position.					
Medford Leas helps its residents live happy and fulfilling lives.					
I can be myself at Medford Leas.					
Staff members are competent to do their jobs.					
Medford Leas appears to run smoothly.					
My residence in this community suits me					

Assisted Living

Attribute	Strongest Primary Drivers			
	Stronger Impact----->Less Strong Impact			
Overall Satisfaction	Confident Living at ML	Finance Office Timely	Sense of Control	
Quality of Life	Sense of Control	Confident Living at ML	Staff Members Friendly	Sense of Belonging
Quality of Services	Administration Responsive	Safe and Secure	Communication: Due Consideration	Competent Staff
Good Value for the Money	Finance Office Timely	Confident Living at ML	Staff Know Me Well	
Willingness to Recommend	Sleep Well in Residence	Staff Know Me Well	Sense of Camaraderie	Safe in Private Residence
Feeling "At Home"	Confident Living at ML	Staff Reflect Quaker Values	Sense of Belonging	
Sense of Contentment	Sense of Privacy	Look Forward to Meal at ML		
Confidence in Knowing ML is Right Place	Sense of Camaraderie	Nursing Station's Knowledge	Pursue Interests (Therapeutic)	Staff Know Me Well

Assisted Living

Ratings of Primary Drivers of Resident Satisfaction



Medford Leas Ratings of Primary Drivers of Assisted Living Resident Satisfaction (Sorted by Strength of Impact)

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I feel confident living at Medford Leas.					
Staff members at Medford Leas know me well.					
I am in control of my life.					
I have a sense of belonging at Medford Leas.					
I have a strong sense of camaraderie with others at Medford Leas.					
The Finance Office is timely in their response to my questions.					



MEDFORD LEAS



Medford Leas

**TOP AND BOTTOM 5
ATTRIBUTES
WITH WHICH RESIDENTS
“STRONGLY AGREED”**

Residential

Top 5 “Strongly Agreed”



Attributes with the Highest Proportion of Residential Living Residents Who Indicated They “Strongly Agreed”

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Staff members are friendly at Medford Leas					
I feel safe when I am in my private residence					
My residence in this community suits me					
I am satisfied with my privacy here					
I feel safe and secure at Medford Leas					

Residential

Bottom 5 “Strongly Agreed”



Attributes with the Lowest Proportion of Residential Living Residents
Who Indicated They “Strongly Agreed”

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I experience a sense of personal fulfillment at Medford Leas					
Communication from Residents to the Administration is given due consideration					
I am satisfied with the Medford Leas Transportation (bus) schedule					
I am an important part of Medford Leas					
I can help make the world a better place because of Medford Leas					

Assisted Living

Top 5 “Strongly Agreed”



Attributes with the Highest Proportion of Assisted Living Residents Who Indicated They “Strongly Agreed”

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I feel safe when I am in my private residence					
I feel safe and secure at Medford Leas					
Staff members are friendly at Medford Leas					
I am confident that Medford Leas is the right place for me					
My residence in this community suits me					

Assisted Living

Bottom 5 “Strongly Agreed”



Attributes with the Lowest Proportion of Assisted Living Residents Who Indicated They “Strongly Agreed”

Attribute	Agreement:				
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I contribute to the quality of life at Medford Leas					
I am satisfied with the frequency that I see my friends who do not live at Medford Leas					
I experience a sense of personal fulfillment at Medford Leas					
I am an important part of Medford Leas					
I can help make the world a better place because of Medford Leas					



Medford Leas

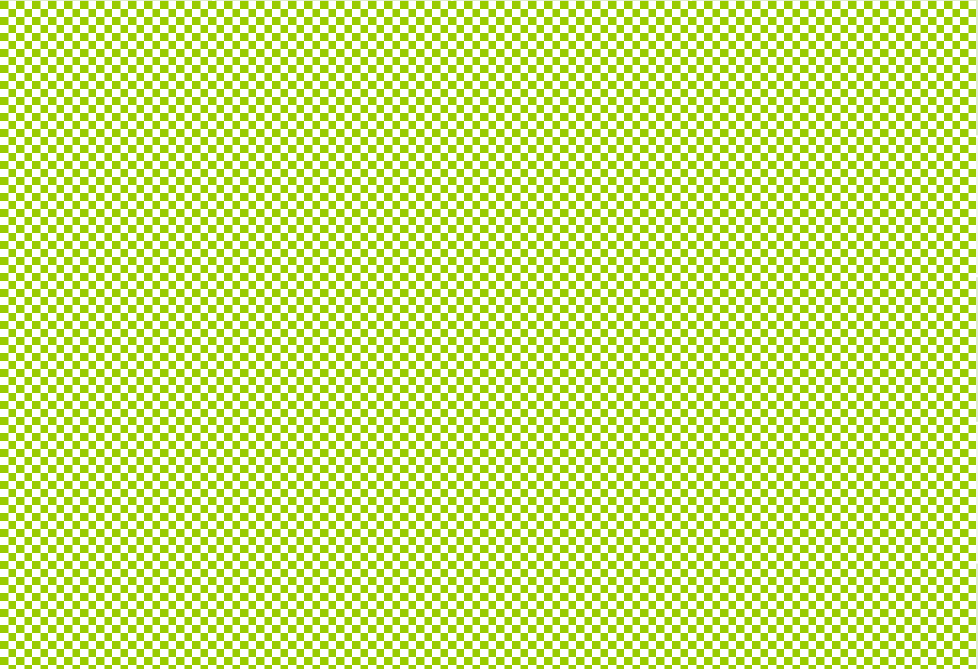
TOP AND BOTTOM 5 ATTRIBUTES RATED AS NEEDING NO IMPROVEMENT

Residential Living

Top 5 Attributes Needing No Improvement



Attributes with the Highest Proportion of Residential Living Residents Who Indicated that No Improvement Was Necessary

Attribute	Improvement Needed:			
	None	Minimal	Some	Considerable
Variety of fitness/aquatics programs				
Courteousness of maintenance staff				
Courteousness of dining services staff				
Quality of fitness/aquatics programs				
Confidence in fitness & aquatics staff				

Residential Living

Bottom 5 Needing No Improvement



Attributes with the Lowest Proportion of Residential Living Residents Who Indicated that No Improvement Was Necessary

Attribute	Improvement Needed:			
	None	Minimal	Some	Considerable
Variety of food on menu				
Quality of support provided by Medford Leas to residents going to and from the hospital				
Quality of IT staff and services				
Courteousness of Pharmacy staff				
Accessibility to medical care provided by the Medford Leas Health Center during evenings, weekends, and holidays				

Assisted Living

Top 5 Needing No Improvement



Attributes with the Highest Proportion of Assisted Living Residents
Who Indicated that No Improvement Was Necessary

Attribute	Improvement Needed:			
	None	Minimal	Some	Considerable
Quality of landscaping services				
Responsiveness of dining services staff				
Responsiveness to special requests and dietary needs				
Courteousness of dining services staff				
Quality of landscaping staff				

Assisted Living

Bottom 5 Needing No Improvement



**Attributes with the Lowest Proportion of Assisted Living Residents
Who Indicated that No Improvement Was Necessary**

Attribute	Improvement Needed:			
	None	Minimal	Some	Considerable
Presentation of food				
Responsiveness to call button				
Quality of food served				
Courteousness of contract rehabilitative staff				
Quality of available physical spaces for religious programs				



Medford Leas

OPEN-ENDED RESPONSES



Residential Living Resident Comments

Why Medford Leas Will Be an Appealing Residential Option (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=197
Great Staff	
Beautiful Setting	
Friendly/Caring People	

Note: Assisted Living resident comments are not included in this section due to the small sample size; AL Residents were likely experiencing survey fatigue and many did not provide open-ended responses



Residential Living Resident Comments

What They Like Most about Medford Leas (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=321
Great Staff	
Surroundings	
Residents	



Residential Living Resident Comments

What, if anything, is missing from the Medford Leas campuses that prevents you from living the life you want to live today?

**Exhibit 1. What Can Be Done to Improve Medford Leas
(Comments Mentioned by 10% or More of RL Residents)**

Comment	RL Res N=225
Communication with Administration	
Infrastructure	

**Exhibit 2. What is Missing from the Medford Leas Campus
(Comments Mentioned by 10% or More of RL Residents)**

Comment	RL Res N=196
More/Improved Transportation	
Outdoor Pool	
Transportation on/between Campuses	
Transportation to Philly/NYC	
Chapel	



Residential Living Resident Comments

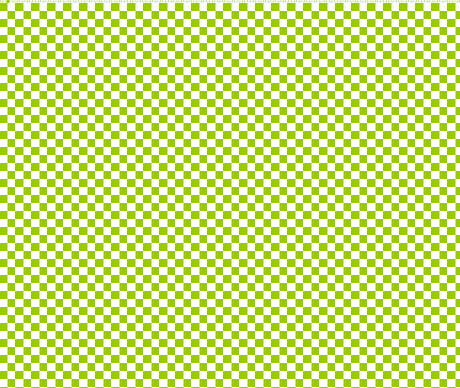
What Needs to be Modernized at Medford Leas (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=225
Heating/AC	
Public Spaces	
Technology/Internet	
Apartments	
Coffee Shop	
Health Center	

In order to remain a desirable, successful, appealing residential community in the next 5 to 10 years...

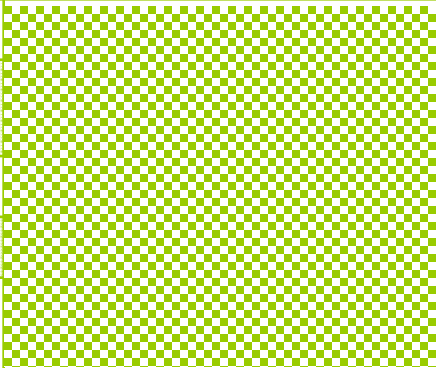
...what new features should residences include?

Exhibit 1. Residential Living Resident Comments about What New Features Residences Should Include (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=140
Washer/Dryer in Unit	
Wi-Fi	
AC/Heat	
Updated/Larger Bathrooms	
Updated Kitchens	

...which residential features should be changed?

Exhibit 2. Residential Living Resident Comments about Which Residential Features Should Be Changed (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=152
Appliances	
Updated/Larger Bathroom	
HVAC Units	
Eliminate Stairs	
Bigger/Better/Larger Kitchen	

In order to remain a desirable, successful, appealing residential community in the next 5 to 10 years...

...which community amenities should be offered?

Exhibit 1. Community Amenities That Should Be Offered (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=104
Transportation	
Parking for Carts/Wheelchairs and Vehicles	
Full-time Coffee Shop	

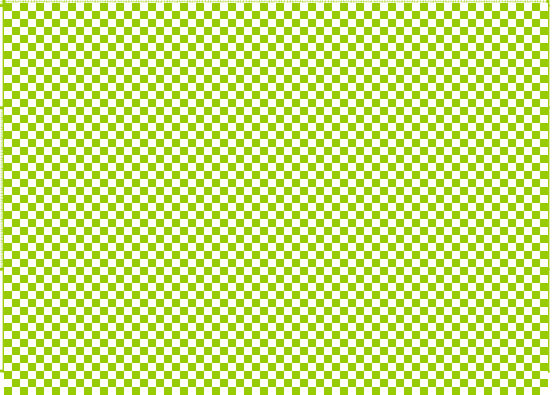
...which new services should be offered?

Exhibit 2. New Services That Should Be Offered (Comments Mentioned by 10% or More of RL Residents)

Comment	RL Res N=88
Full-time Doctor	
Bus Service to Main Building	

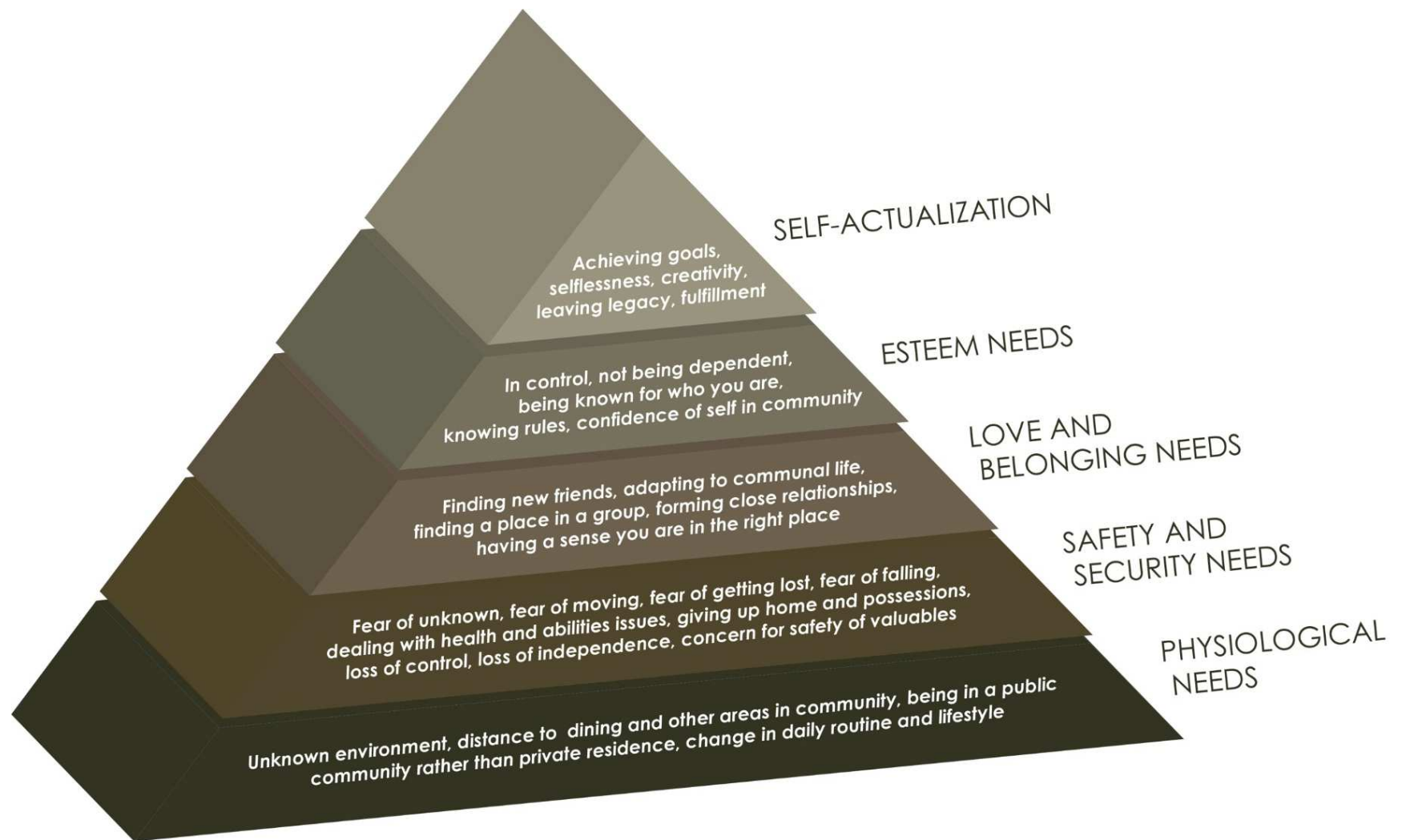
What would need to be different at Medford Leas in order for your children, relatives or friends to move here in the future?

**What Would Need to be Different in Order for Family and Friends to Move to Medford Leas in the Future
(Comments Mentioned by 10% or More of RL Residents)**

Comment	RL Res N=166
Lower Costs/Make Affordable	
Update Campus- Infrastructure/Technology	
Have More Diversity	



Hierarchy of Needs



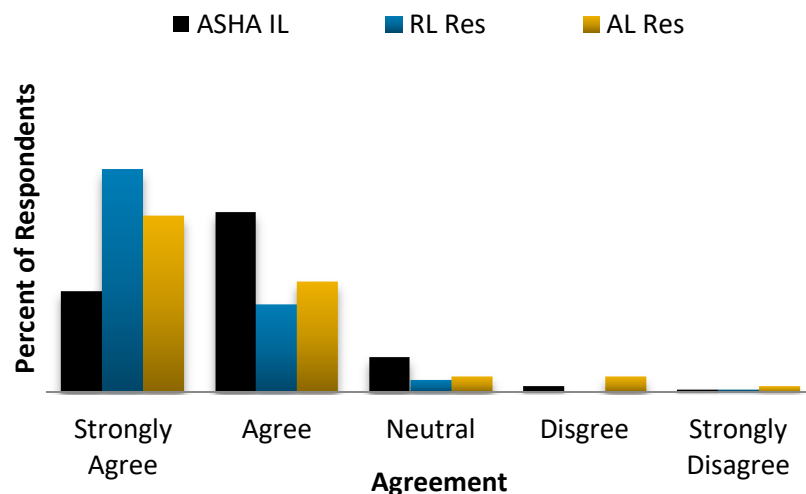


Physiological Needs

Title	Maslow's Descriptors	Life at Medford Leas
Physiological Needs First (Lowest) Level	<ul style="list-style-type: none"> • Food • Water • Shelter • Clothing • Sleep 	<ul style="list-style-type: none"> • Moving to an unknown environment • Choosing, packing, moving, unpacking and storing items in new residence—then remembering if you brought it and where it is • Not being responsible for one's meals or housekeeping • Adjusting to a schedule • Maintaining a comfortable temperature in the new residence • Managing incontinence issues in a communal environment • Physical limitations and navigating a new environment • Being in public instead of private • Experiencing the innate need to preserve sense of self

Exhibit 1. My residence in this community suits me.

ASHA 2013: Satisfaction with – My home/apartment in this building/community



The private residence was among the highest rated attributes for residential living. More than nine out of 10 RL residents agreed or strongly agreed that their residence in the community suits them (Exhibit 1). This feeling of satisfaction with the private residence was one of the primary drivers of RL resident quality of life in the community as well as their impression that the community offers them good value for the money.



Physiological Needs

Exhibit 1. I sleep well in my residence.

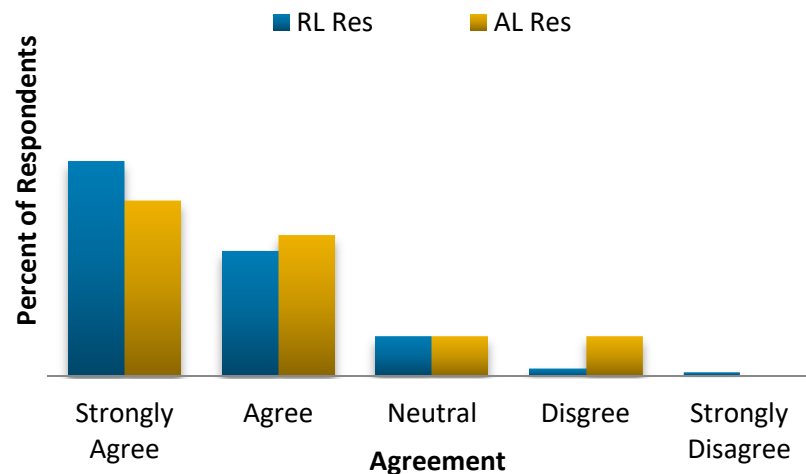


Exhibit 2. I am comfortable with the temperature in my residence at all times.

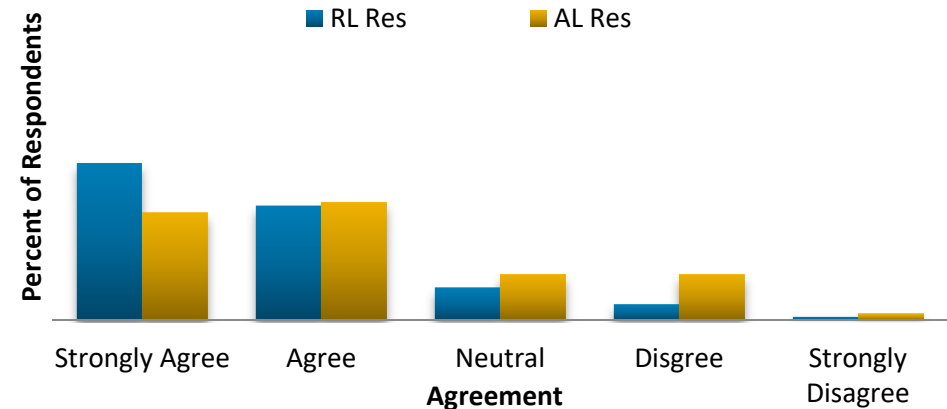
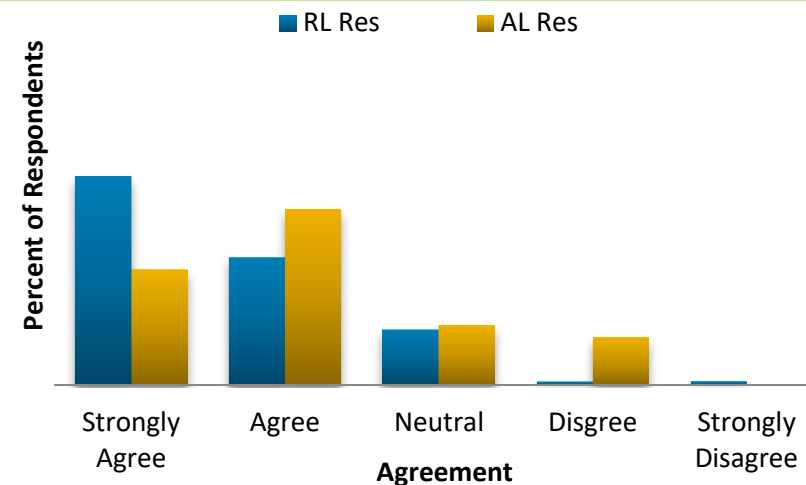


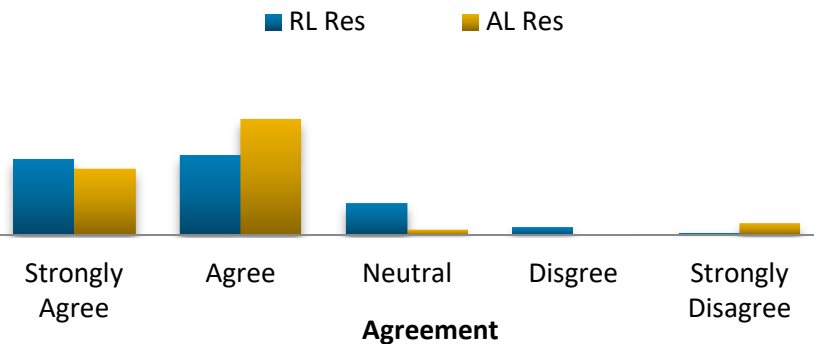
Exhibit 3. My residence is a reflection of me.



Speaking to one of the most basic needs on Maslow's hierarchy, ability to sleep well in the private residence is important, especially to assisted living residents. More than 80% of both RL and AL residents either agreed or strongly agreed that they sleep well in their private residence in the community (Exhibit 1). The ability to sleep well in the residence was one of the primary drivers for AL residents' willingness to recommend the community to their family and friends.

Physiological Needs

Exhibit 1. Services and amenities are a reasonable distance from my residence.



ASHA 2013: The dining schedules allow me to eat when I like to eat.

Exhibit 3. The dinning schedules allow me to eat at times I prefer.

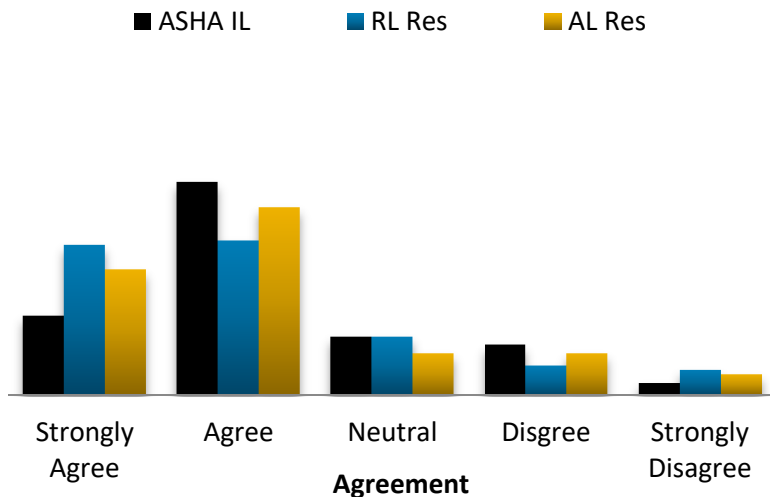
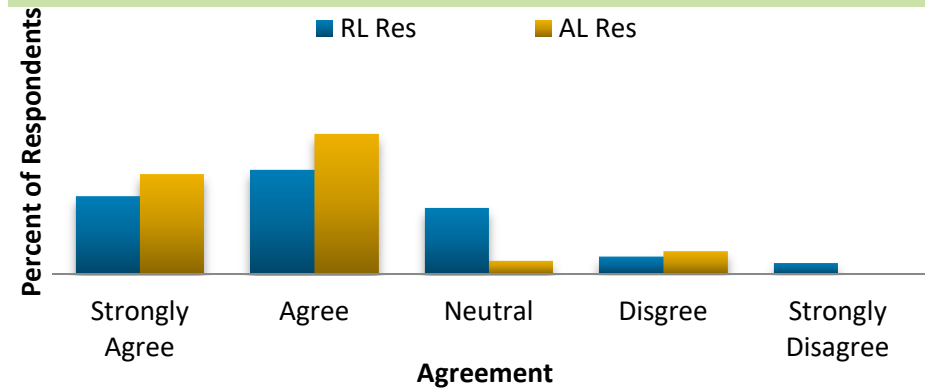


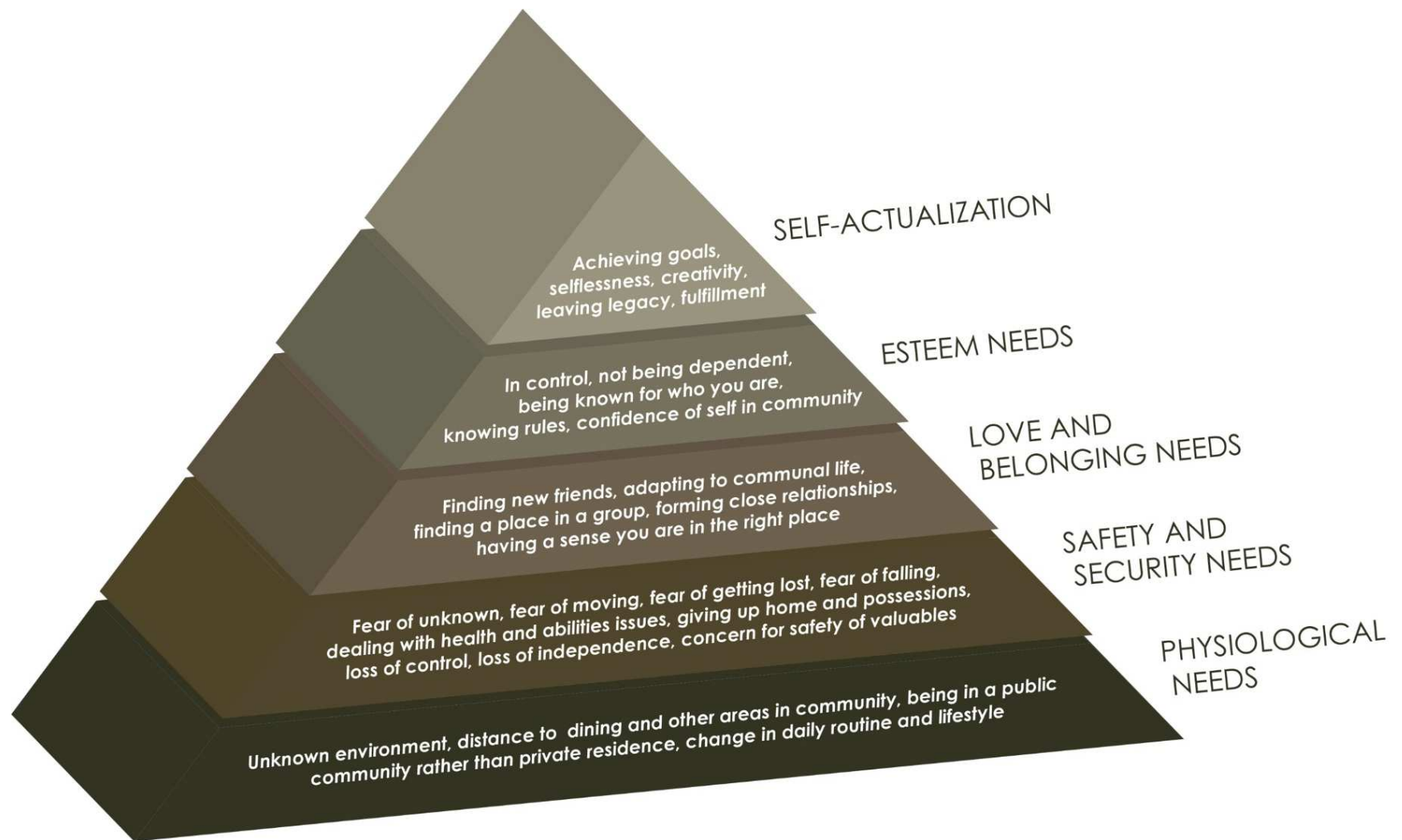
Exhibit 2. I look forward to having a meal at Medford Leas.



Fulfilling one of the basic (first level) needs on Maslow's hierarchy, Medford Leas customers want to look forward to having a good meal at the community. This is an area where improvement can be made. Ten percent of RL residents either disagree or strongly disagree that they look forward to having a meal at the community (Exhibit 2). This attribute is particularly important because it is a primary driver in both RL and AL residents' sense of contentment.



Hierarchy of Needs





Opportunities for Improvement

- ❑ Communication
- ❑ Information Technology
- ❑ Transportation
- ❑ Health Care Accessibility
- ❑ Customer Service
- ❑ Dining
- ❑ Assisted Living Quality of Life





Task Forces

Composition

- Residents and Staff
- MLRA (Resident Council) input

Work of Task Forces:

- Review data from the survey
- Define specific areas for improvement
- Develop improvements to programs and/or services to address issues raised in survey
- Continuous process to improve services to residents
- Communicate work of the Task Forces



Ongoing Communication

- ❑ Monthly Community Conversations
- ❑ Task Force Meetings
- ❑ Resident Association
- ❑ Copies of all Presentations on Resident Website





Staff and Resident Involvement

- ❑ Communication (2 Staff & 5 Residents)
- ❑ Information Technology (2 Staff & 4 Residents)
- ❑ Transportation (1 Staff & 5 Residents)
- ❑ Health Care Accessibility (4 Staff & 3 Residents)
- ❑ Customer Service (2 Staff & 2 Residents)
- ❑ Dining (5 Staff & 10 Residents)
- ❑ AL Quality of Life (4 Staff & 12 Residents)





Closer Look – Communications

□ Membership

- Dir. of Development & Community Rel., Convener
- CEO
- 5 Residents





Example - Communication Task Force

- ❑ Focus on communication between residents and Administration
- ❑ Review of the many vehicles through which we currently communicate.
- ❑ Importance of transparency
- ❑ Need for voices to be heard
- ❑ Need for improvement to orientation process for newcomers, as well as current residents
- ❑ Improve our Friendly Visitor Program
- ❑ Importance to nurture communication in order to build community





Example - Communication Task Force

- ❑ Increase opportunities for “face time” with CEO
 - Small group meetings with CEO
 - CEO meetings with AL Resident Council
- ❑ MLRA to continue to improve new resident orientation
 - Benefitted both new and old
- ❑ Posting documents in the library and MLRA website
 - 990, Disclosure Statement, Audit
- ❑ MLRA review Friendly Visitor Program
- ❑ MLRA & CEO developed new tracking system for PIW’s





Some Highlights

- ❑ **Health Care Accessibility** - Education regarding practitioners availability 24/7/365, Hospital Visits
- ❑ **Communication** – ‘Coffee with Administration’, AL Resident Association
- ❑ **Dining-Residential** - Monthly Social Events, Special Meals
- ❑ **Information Technology** - Call-to-Aid, Wi-Fi, Work Orders
- ❑ **Transportation** - Additional bus trips, Internal Transportation Trial
- ❑ **Customer Service** – Pharmacy Consultant Staff Training
- ❑ **AL Quality of Life** - Focus on dining





Lessons Learned

- ❑ Regularity of Surveys
- ❑ Staff-Resident Participation is Key
- ❑ Communicate, Communicate & Communicate
- ❑ Survey Too Long
- ❑ Stress the Importance of The Opportunity to Improve
- ❑ Use a Professional
- ❑ Nuggets of Wisdom in Written Comments

Residential Living

Attribute	Strongest Primary Drivers				
	Stronger Impact----->Less				
Overall Satisfaction	Happy & Fulfilling Lives	Competent Staff	Confident Living at ML	Strong Financial Position	
Quality of Life	Sense of Belonging	Confident Living at ML	Strong Financial Position	Residence Suits Me	
Quality of Services	Competent Staff	Number of Friends			
Good Value for the Money	Strong Financial Position	Communication: Due Consideration	Confident Living at ML	Residence Suits Me	Happy & Fulfilling Lives
Willingness to Recommend	ML Runs Smoothly	Be Myself at ML	ML Promotes Good Health	Communication: Timely & Informative	Happy & Fulfilling Lives
Feeling "At Home"	Sense of Belonging	ML Runs Smoothly	Be Myself at ML	Important Part of ML	
Sense of Contentment	Sense of Belonging	Look Forward to Meal at ML	Sense of Control		
Confidence in Knowing ML is Right Place	Sense of Belonging	Be Myself at ML	Confident Living at ML		



Long-Range Focus Based on Survey

- ❑ Happy & Fulfilling Lives
 - Already had 80+ Resident Committees
 - Expanded Pathways For Learning
 - ❑ Opportunity to Showcase to the Greater Community
- ❑ Competent Staff
 - Already had Great Staff
 - Implemented Staff Satisfaction Surveys & Follow-up
 - Aspire to Become a Best Place to Work



Long-Range Focus Based on Survey

- ❑ Confident Living at Medford Leas
 - Already Had Feeling of Safety
 - Augmented Security Roles
 - Investing in State-of-Art Access Control, Call-to-Aid
- ❑ Strong Financial Position
 - Already Had Strong Balance Sheet
 - Retired All Debt
 - Redeveloping Campus With Cash
 - Focus on Financial & Architectural Prudence
 - ❑ Buildings Augment Don't Drive Engagement



Results

- ❑ Continue to Grow Census 90+%
 - Eliminated All But Occasional Spot Incentives
- ❑ Operational Results in 50-75th percentile
 - Value Proposition
- ❑ Increased Cash Position
 - Aspire to 75th Percentile (within 10 days cash)
 - Balance Growth With Long-Term Investments in Plant & Technology
- ❑ Continue to Have Remarkably Engaged Residents
 - Residents Historically Drove 40+% Referrals



Or...



"Ok, how about this motto: 'If you are unhappy for any reason, we will feel really bad'."



MEDFORD LEAS



Questions & Answers

