

2011-2012 NATIONAL SURVEY OF  
CUSTOMER AND EMPLOYEE SATISFACTION  
IN ASSISTED LIVING COMMUNITIES



NATIONAL RESEARCH  
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## INTRODUCTION

- Population Projection Highlights

## OVERVIEW AND DATABASE

- Overview
- Database
- Characteristics
  - i. Customers
  - ii. Employees

## CUSTOMER SATISFACTION

- Overview
- Areas of Greatest and Least Satisfaction

## WORKFORCE SATISFACTION

- Overview
- Areas of Greatest and Least Satisfaction

## DEEPER ANALYSIS

- Overview
- Performance Relationships
- Understanding the Feedback
- Identifying Drivers of Recommendation Scores
- Range of Performance

## CONCLUSION

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# INTRODUCTION

- Introduction
- Population Projection Highlights

### INTRODUCTION

Assisted living communities are as diverse as the residents they serve. While the organizations range dramatically in terms of size, operational models, and licensure requirements, the residents also have a range of support needs and expectations for their experiences with the communities. In the effort for assisted living communities to provide and improve their approach to person-centered care and position their organizations to best serve the shifting needs of their residents and communities, as well as to navigate changes in the long term care business environment, these organizations have multiple sources of information from which to draw. Among the richest is the information and feedback provided directly by the profession's most valuable stakeholders—the residents, their family members, and assisted living employees.

This insight is presented in this 2011-2012 National Survey of Customer and Employee Satisfaction in Assisted Living Communities (the National Research Report). It has been gathered through the administration of satisfaction surveys that were designed specifically for assisted living customers and employees. This process and its resultant data can be used to serve multiple purposes within the long term care profession. In addition to a deep look at the satisfaction levels of customers and the assisted living workforce, it offers a data-rich inside understanding of the experiences and perceptions of these groups. The results can be used, therefore, to modify behaviors, policies, and standards that impact employee and customer

satisfaction, and also to direct culture change, the development of workforce training activities, family communication and engagement strategies, and creation of resident programs, to name a few.

Further, the objective data can support a wide variety of activities in service of the profession. It provides a picture of the characteristics of employees and customers in addition to numbers that represent the opinions of these stakeholders, all of which can be used for education, public relations, business development activities, and advocacy.

This second annual National Research Report for assisted living has been prepared and presented by National Research Corporation to put its knowledge and data of assisted living into the hands of the profession's leaders, for all of the widespread purposes previously listed, as well as for the individual activities that go on at communities every day. It is our intent to fuel conversations, in the smallest of individual communities and the largest of representative groups. The objective is that this data becomes a meaningful part of conversations and decisions that will support the ongoing strategies, health, and success of the assisted living profession as it continues to serve a critical role in the long term care profile of the U.S.

### Projected Population Trends

Assisted living communities are well-positioned to serve the growing needs of the aging population who seek to maintain as much

independence as possible while still requiring more care and a safer environment than at home. Even when it is difficult to accept the need for some help on a daily basis, for many of this nation's elders and their families, assisted living presents a practical alternative to a residence that involves more intensive care or to moving in with loved ones. We know that the aging population is increasing. Simply, the number of people over the age of 65 is expected to increase from the 39.4 million counted in 2009 to 54.2 million projected in 2020 (see figure 1).

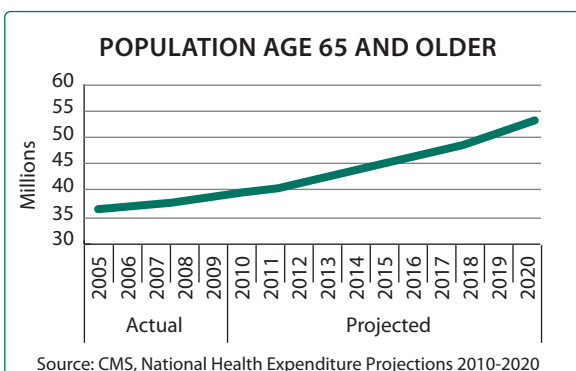


Figure 1

Plus, there is an increasing life expectancy (see figure 2) and increasing prevalence of chronic disease and activity limitations (see figure 3) among this portion of the national population.

In 2009, seniors aged 65 and 75 were expected to live an additional 19.2 and 12.2 years, respectively. For each of those groups, this represents an increase in life expectancy (specifically at ages 65 and 75) of about one additional year since the last estimate in 2004 just five years previous. At the same time, data

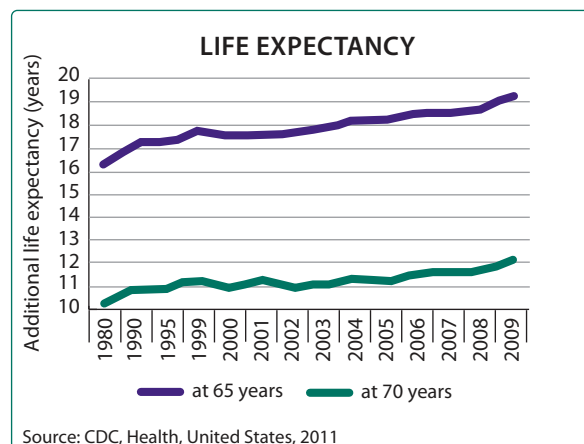


Figure 2

shows that the percentage of seniors over the age of 65 with chronic conditions (specifically heart disease, cancer, and stroke) and/or with activity limitations is also increasing.

Not only will there be more people living longer, this nation will have a community of individuals and their children who have different expectations for how the later years of their lives will be lived out. Seniors will have more health issues to manage and more limitations on their ability to care for themselves. Yet anecdotally, we know that seniors will want to be far more active than previous generations while also maintaining less of a burden to their families.

By truly listening to the experiences and perspectives of key stakeholders—residents, families, and employees—assisted living communities will be able to capably serve this growing contingent, adapt to shifting needs, and satisfy the evolving expectations of seniors.

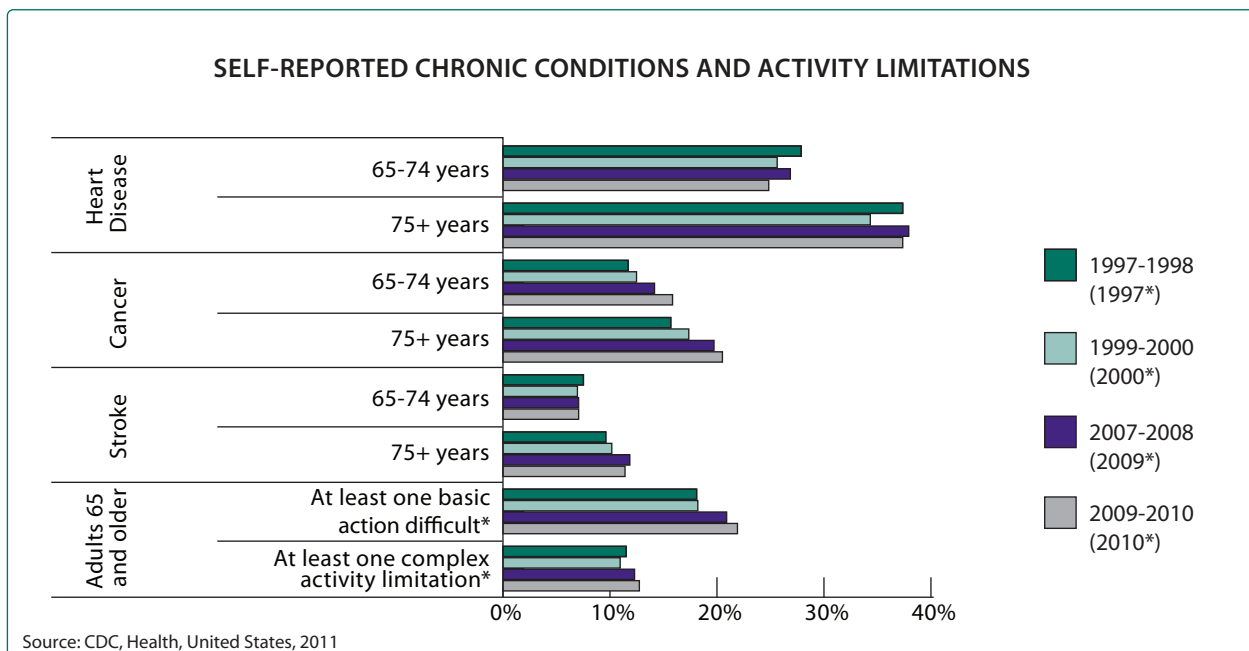


Figure 3

\*The dates for the chronic condition reporting are the ranges shown, the dates associated with the activity limitations are the single years shown in parentheses.

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# OVERVIEW AND DATABASE

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  - ii. Employees

## OVERVIEW AND DATABASE

The 2011-2012 National Survey of Customer and Employee Satisfaction in Assisted Living Communities (National Research Report) presents feedback and insights gathered from residents, families, and employees of assisted living communities through surveys administered by National Research Corporation through its My InnerView product line.

These surveys collect information to support assisted living organizations in the everyday work to use an evidence-based understanding to improve their abilities to offer a safe, person-centered environment for residents. These are often referred to as “satisfaction surveys” but include a far more diverse assessment of the resident, family, and employee experience of an assisted living community than basic satisfaction measurement. The customer surveys, administered to residents and family members, include 34 questions on a variety of types of interactions with the organization, from billing accuracy to care and concern of the staff. The employee surveys include 21 questions ranging from comparison of pay to quality of teamwork.

Both sets of data can be used by the long term care organizations to objectively collect and understand the perspectives of these individuals, evaluate the effectiveness of standards and programs in place, and measure the impact of changes within the organization. Communities further use these insights to direct future efforts around performance improvement, employee engagement, customer communication, public outreach, and many other goals.

National Research Corporation hosts the largest collection of data reflective of the views and opinions of residents, families, and employees across the long term care spectrum, including skilled nursing homes, assisted and independent living communities, adult day facilities, home health agencies, and continuing care retirement communities (CCRCs). This report includes observations limited to assisted living communities, drawing on data from the 2011 My InnerView customer (resident and family) experience and employee engagement product database as well as from publicly available data released from the Centers for Medicare and

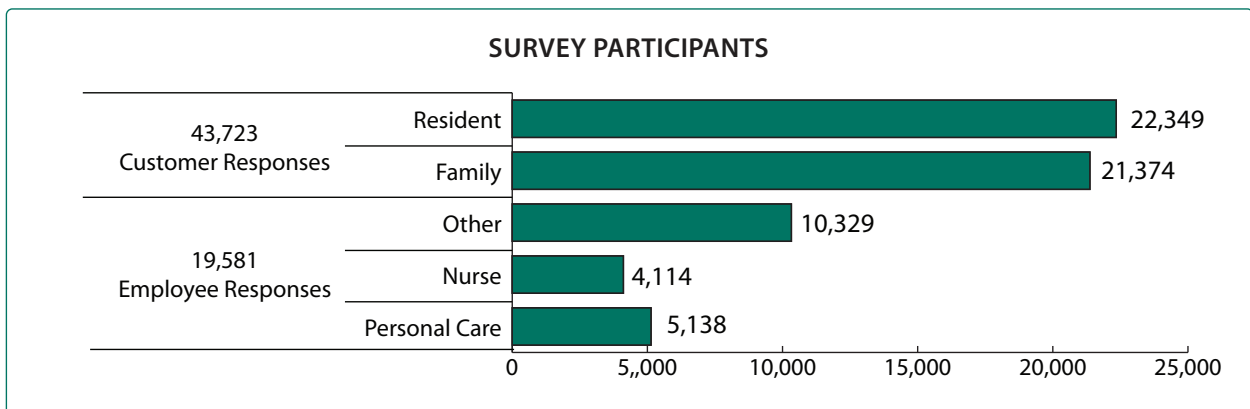


Figure 4



Medicaid Services (CMS) and the Centers for Disease Control (CDC).

## Database

In our second year of releasing this National Research Report for assisted living, the volume of communities, customers, and employees represented continues to grow. This year’s report includes 1,513 assisted living communities, a 12% increase from the 2010-2011 report. This also includes results from nearly 20,000 employees (50% more than in the previous year) and almost 44,000 customers, which is a 23% increase (see figure 4). Residents make up just over half of the customer database, while nursing and personal care staff comprise just under half of the workforce feedback.

Nearly twice the number of individuals received surveys and had the opportunity to have their voices heard. The response rate for the family surveys was 44%, while the response rates for residents and employees were identical at 58% (see figure 5).

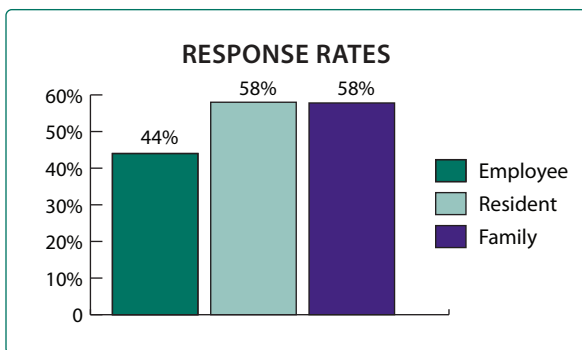


Figure 5

## Characteristics of Customers

Data on the demographic characteristics of the customers provides context with which to frame interpretation of the results of the National Research Report analysis. The resident age and the length of residence inform our understanding of the individuals living in the assisted living communities and the tenure of their relationships with the organizations. The overview of the type of relationship the family member shares with the resident and the frequency of their visits tells more about the perspectives of those responding to the survey. These demographics are almost identical to those released in last year’s report, with just a 1% resident shift from the “under 60” age group to the “90 or older” age group, and a similar 1% family shift from sibling to spouse relationships.

- More than 4 out of every 5 residents (82%) are 80 years of age or older (see figure 6).

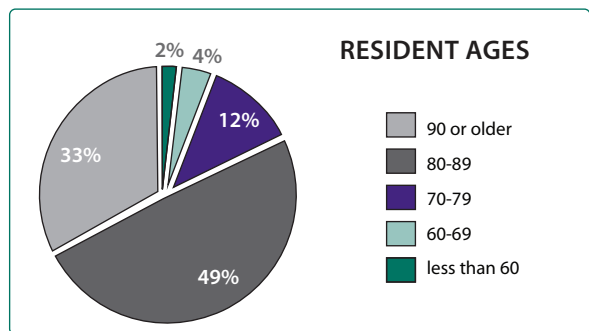


Figure 6

- Residents are grouped relatively evenly into three categories based on how long they have lived in the community—31%

have been there 3 or more years, 37% 1-3 years, and the remaining 32% have lived there less than 1 year (see figure 7).

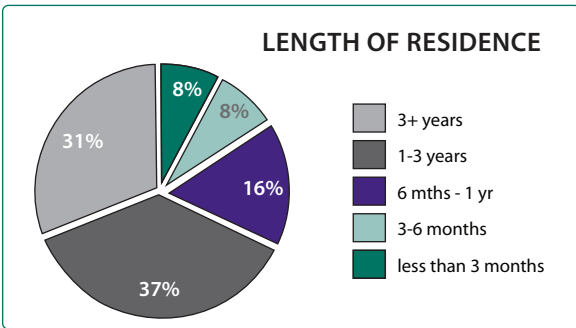


Figure 7

- More than three-quarters (76%) of family respondents visit their loved one at least weekly (see figure 8).

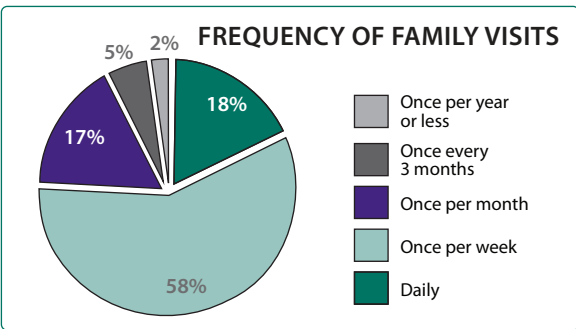


Figure 8

- Most family respondents (67%) are children of the resident (see figure 9).

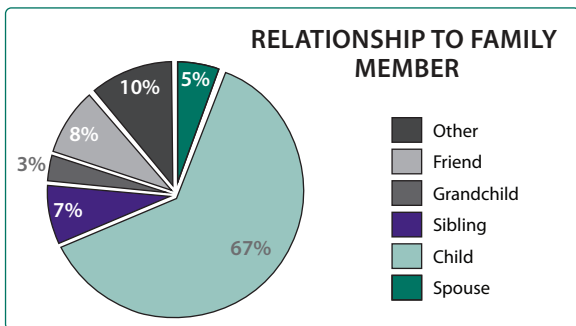


Figure 9

## Characteristics of Employees

As the characteristics of customers helps us better understand their perspective, knowledge about the composition of the workforce helps us understand the employees that serve at the heart of the long term care profession.

- Workers in their 40's and 50's each represent 21% of the assisted living employee base (see figure 10). That percentage drops to 18% for workers in their 30's, but jumps to 29% for employees under 30.

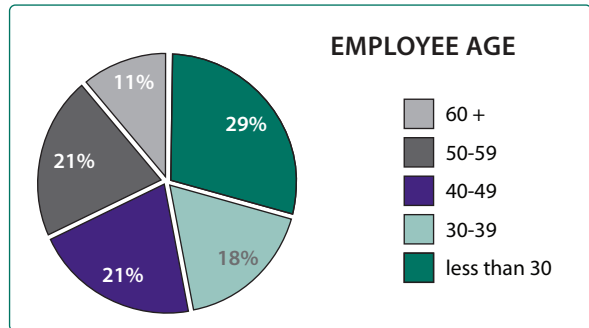


Figure 10

- Identical volumes of employees have been working at their community for less than 1 year, and for 5 years or longer (28% each, see figure 11).

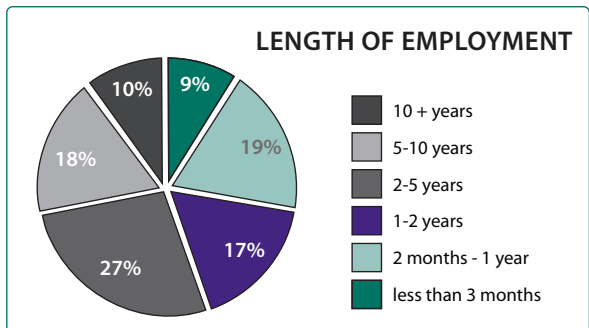


Figure 11

This demonstrates that while a good portion of the assisted living workforce experiences turnover, an equal portion has considerable tenure and experience.

- Of the respondents who provided their job category, personal care employees are the most represented as a single work group in this survey (30%), and nurses the second most (24%, see figure 12).

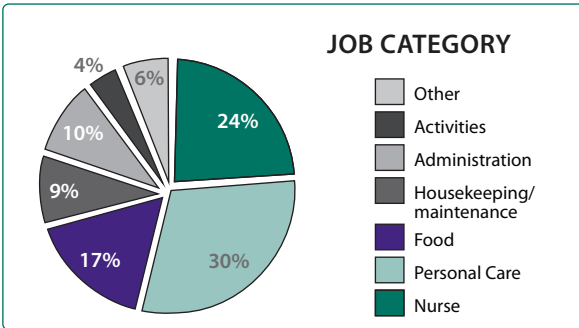


Figure 12

- Just over one in four employees (28%) work fewer than 30 hours per week (see figure 13).

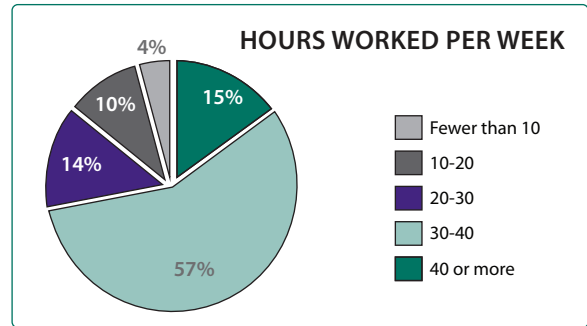


Figure 13

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# CUSTOMER SATISFACTION

- Overview
- Areas of Greatest and Least Satisfaction

## CUSTOMER SATISFACTION

As a whole, customers (both residents and families) provide high marks to their assisted living communities in overall satisfaction. More than 90% of each group said overall satisfaction is “good” or “excellent” and that they would recommend their communities as a “good” or “excellent” place to live (see figure 14). Feedback is slightly more positive from family members, especially when looking at the “excellent” rating.



Figure 14

Feedback from residents and family members has been consistently high during the 6 years that National Research Corporation has collected information from this contingent (see figure 15). The cumulative positive rating of 91% from residents is slightly up from last year’s report, while the family rating (92%) is a little down. When reviewing scores from each of the previous years, satisfaction peaked in 2009 with numbers that are just slightly higher than what was measured in 2011. Satisfaction scores were

lowest in 2007. Due to the dramatic increase in participation in standardized satisfaction surveying among assisted living communities in the last two years, it is plausible to present the historical information for a frame of reference, but National Research cautions against using it to draw judgments about changes in resident and family experiences and perceptions.

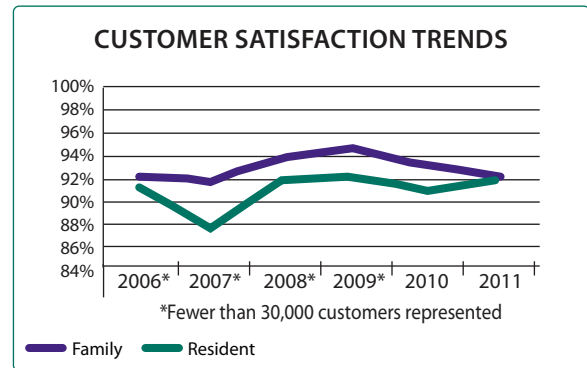


Figure 15

## Areas of Greatest and Least Satisfaction

Both residents and family members gave assisted living communities an overall positive rating more than 90% of the time. When looking at resident and family experiences and satisfaction with individual aspects of their communities, however, that rating fluctuates. At the high end, 96% of families provide positive feedback about the respectfulness of staff, but only 72% of residents, on the low end, provide positive feedback about the appeal of food (28% of the time saying that it is only fair or poor).

“Excellent” ratings help to understand where communities truly excel in the eyes of customers, who have a great level of agreement on these opinions. Families and residents alike cited “respectfulness of staff,” “safety of facility,” and “courteousness of dining staff” as the three areas where assisted living communities are most successful (see figure 16). “Excellent” scores ranged between 55% and 65% for these three items.

On the other hand, there is a slight disagreement about where communities are least successful. Residents and families were least impressed with “comparison of charges” (28% and 27%, respectively). Residents provided feedback that “adequacy of storage space” was the area second to the bottom in terms of excellence at 28%. Families were moderately less troubled by this issue, placing it fourth

from the bottom of the list at 34%. “Grow as a person opportunities” was the second least successful area of operations from the perspective of families (30% excellent) and third least for residents (also at 28%).

The scores for these areas of satisfaction have not changed dramatically since the research conducted for last year’s report. The residents’ ratings in top performing areas were one or two points higher this year than last; the families’ ratings were even for “respectfulness of staff,” down by 1% for “safety of facility,” and up 1% for “courteousness of dining staff.” The lower performing areas had more consistent improvement – all of the “excellent” scores were up for both residents and families by 1% or 2%, except for “comparison of charges,” where residents’ satisfaction increased from 25% to 28%.

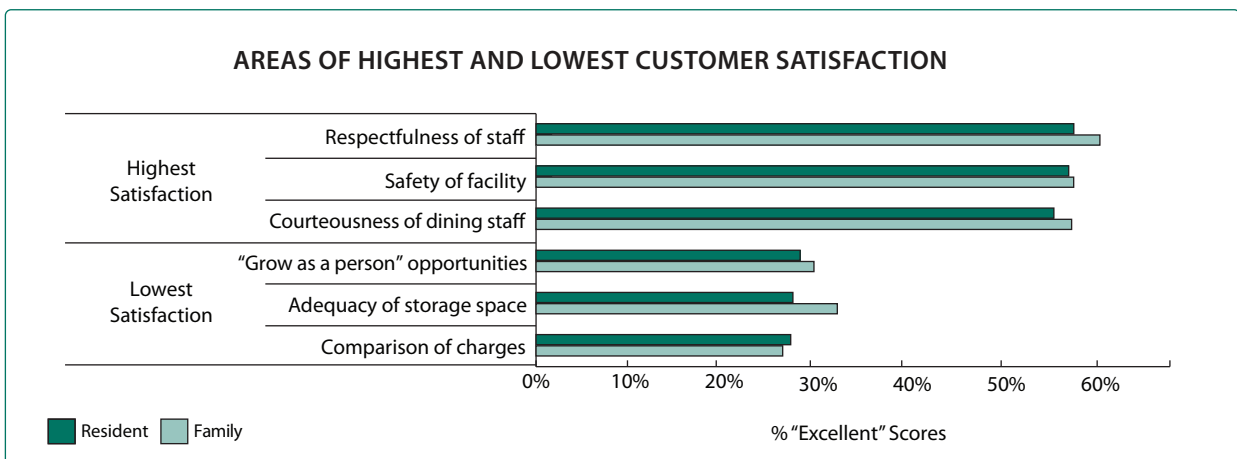


Figure 16

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# WORKFORCE SATISFACTION

- Overview
- Areas of Greatest and Least Satisfaction

## WORKFORCE SATISFACTION

Feedback from employees is less glowing than that provided by customers, yet positive in many areas. Regardless of the business, it is common for employee satisfaction to be lower than customer satisfaction. It can be easy to look past the challenging responses that are offered and to dismiss them for one reason or the other. The opinions voiced through this process, however, provide useful and clear information about what organizations and leaders can do to improve the working environment and the relationships with the people who hold so much responsibility for the successful operation of assisted living communities. Employees are not only getting things done every day, they are creating experiences for residents and families and thereby identifying the assisted living community in the mind’s eye for those individuals.

For the sake of this analysis, employees have been divided broadly into three groups: nurses, personal care, and the full workforce. Each group tells a part of the story that can be combined to inform employee engagement and program efforts. Feedback is often similar, but sometimes different.

Nurses, personal care employees, and the whole workforce have similar levels of positive feedback (combined “good” and “excellent” responses) for overall satisfaction and recommendation of the community as a place to work. Scores range from 66% for overall satisfaction of personal care employees (slightly higher at 67% for personal care employees’ recommendation) to 72% for the entire workforce’s response to both questions (see figure 17).

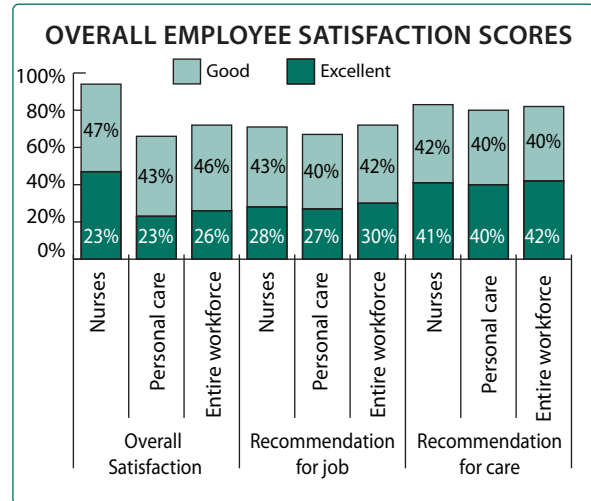


Figure 17

Nurses fell between the two sets of scores, offering a 70% positive overall satisfaction score and 71% positive recommendation for the job.

### Areas of Greatest and Least Satisfaction

Employee recommendations of assisted living communities as a place to receive care appears in the “excellent” and “good” categories at a higher level. More than 40% of all three groups would recommend their communities as an “excellent” place to receive care and more than 80% offer a positive recommendation.

The different categories of employees may not share the exact same scores, but the feedback is consistent (see figure 18). When looking at the areas of performance where employees had given their communities the highest and lowest “excellent” scores, the lists are identical. All three lists include “sense of accomplishment,”



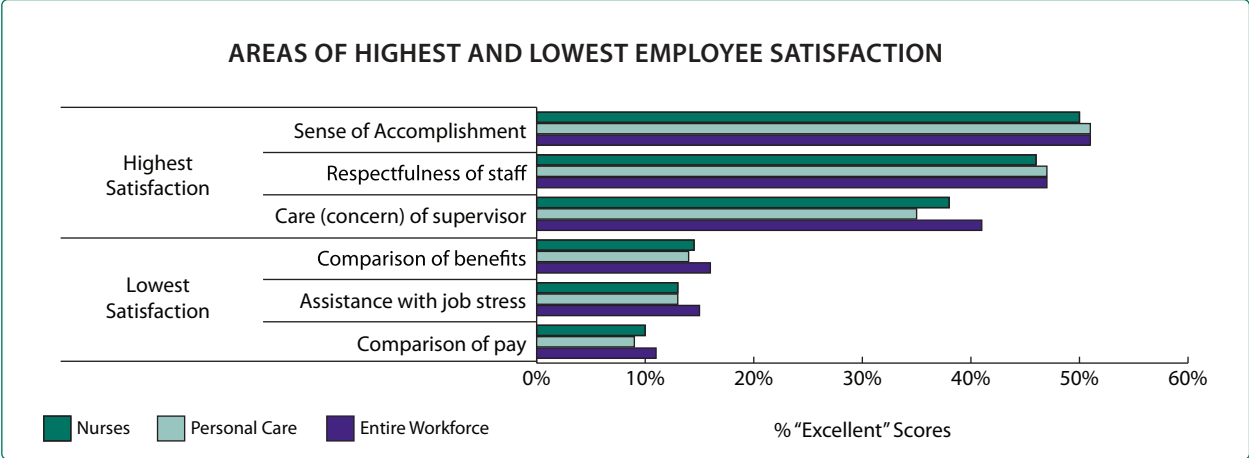


Figure 18

“respectfulness of staff,” and “care (concern) of supervisor” with the highest “excellent” scores, ranging from 35% (“care (concern) of supervisor” for personal care) to 51% (the full workforce’s “sense of accomplishment”).

The three groups of employees are also challenged by the same three areas: “comparison of pay,” “assistance with job stress,” and “comparison of benefits.” The range of “excellent” scores

for these three items spans from 9% (“comparison of pay” for personal care) to 16% (“comparison of benefits” for the entire workforce). Despite the very low scores in each of these areas, as discussed in the next section, none are among those most tightly tied to the global satisfaction “recommendation as a place to work,” which may provide insight into the relative importance of these areas to employees.

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# DEEPER ANALYSIS

- Overview
- Performance Relationships
- Understanding the Feedback
- Identifying Drivers of Recommendation Scores
- Range of Performance

## DEEPER ANALYSIS

As we seek to better understand resident, family, and employee experiences with assisted living communities, there are several ways to delve into the data to further explore the relationships and the stories hidden inside the numbers.

### Performance Relationships

The first thing about satisfaction scores, in general, is that they tend to move together and they tend to move with other quality indicators. We have seen this phenomenon in multiple settings of healthcare.

In the assisted living profession specifically, the same trends exist. Communities with higher average employee satisfaction scores tend to have higher average family satisfaction scores, and communities with higher family satisfaction scores tend to have higher customer satisfaction scores (see figures 19 and 20).

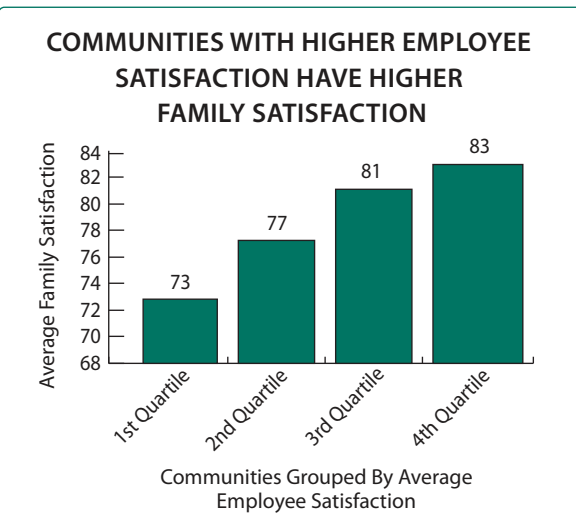


Figure 19

This was evaluated this by grouping assisted living communities into four quartiles based on either employee or family scores and then calculating the average family or resident

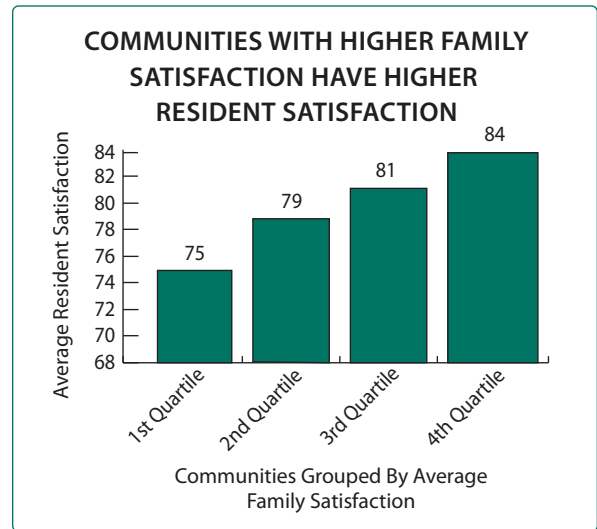


Figure 20

satisfaction score for each group. This analysis provides two affirmations. First, organizations that tend to excel in one area also tend to excel in the other. Second, there is evidence to emphasize the importance of focusing on employee satisfaction and engagement, even if an organization’s priority is resident and family satisfaction.

### Understanding the Feedback of Specific Groups of Individuals

Another way to dig into the data is to evaluate trends in satisfaction by subsets of the customer or employee population. For example, satisfaction tends to peak when the resident

has been in the community between 1 and 3 months (see figures 21 and 22), which applies to either resident or family satisfaction. Both groups provide the highest percent of “excellent” overall satisfaction ratings at that time (55% for residents and 58% for families). Where the resident positive satisfaction score also peaks during that window (at 96%, dropping down to 92% for most other lengths of stay), the same drop is not seen in family scores (those are and remain at 93%, until the peak 94% score at 1-3 years, and a slight drop to 92% in the 3 or more years group).

This sort of subset analysis shows similarly limited variation in scores when evaluated at the national level. When reviewed at the community level, however, it may highlight strong or weak areas of performance with certain portions of the customer or employee population, which may lead to identification of root causes of disappointments in satisfaction scores.



Figure 21

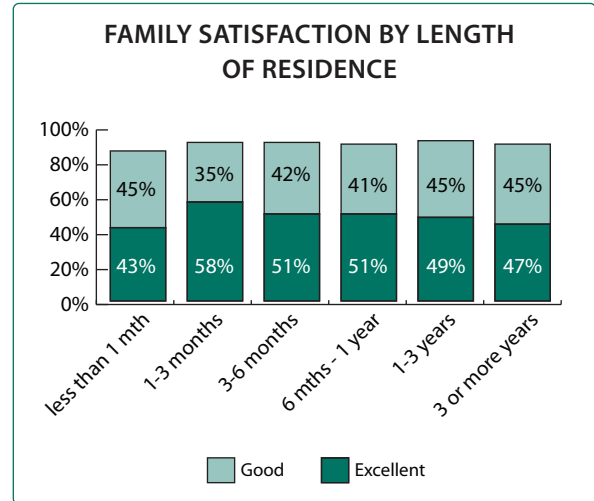


Figure 22

### Identifying Drivers of Recommendation Scores

Perhaps the most meaningful way to truly understand experience and satisfaction data, and to hone in on areas of interaction and support that are most meaningful to key stakeholders, is to correlate analysis that identifies the drivers of overall satisfaction. That is, find the specific areas of measurement that trend most consistently with global measures of satisfaction. This can reveal where to focus performance improvement efforts on areas that will have the greatest impact.

To conduct this analysis for the National Research Report, individual questions in the surveys were correlated with two global measures: recommendation as a place to receive care for customers (residents and families), and recommendation as a place to work for employees.

While looking at residents and family members separately, it was found that the top drivers of overall satisfaction were almost identical. The top three lists for both included “competency of staff,” “responsiveness of management,” and “choices/preferences” (see figure 23). “Care (concern) of staff” was fourth for residents and fifth for families. The items that round out each list of the top five differ: “home-like atmosphere” was fifth for residents (seventh for families) and “responsiveness of staff” was fourth for families (seventh for residents).



Figure 23

The items that were least associated with recommendation were the same for both groups (although in slightly different orders) and also provide further insight into the aspects of the relationships between assisted living communities and their customers (residents and families) that are less meaningful to the customers themselves. This doesn’t make them unimportant, just less likely to influence how a customer thinks about an assisted living community in a global way. The three items with the lowest correlation scores were: “religious/spiritual opportunities,” “adequacy of storage space,” and “control of room temperature.”

Interestingly, neither the highest correlated items nor the lowest correlated items are repetitive of the areas that receive the highest and lowest “excellent” scores on the satisfaction survey. It may not be easy, but there is almost certainly opportunity to focus on the top drivers of satisfaction, improve in those areas, and in doing so improve customer recommendation scores.

The same activity was applied to understand what really drives employee satisfaction with assisted living communities as employers, and leads staff to be more likely to recommend their communities as a place to work. Again, there was considerable consistency among the different groups of employees and all three identified the same top four drivers of overall satisfaction: “care (concern) of management,” “attentiveness of management,” “assistance with job stress,” and “clear expectations of management” (see figure 24). The same three items are also seen as those least correlated with overall satisfaction: “sense of accomplishment,” “quality of teamwork,” and “respectfulness of staff.”



Figure 24

Unlike with the customers, there is considerable overlap between the top and bottom drivers of satisfaction and the items with the highest and lowest percent of “excellent” scores. In fact, one of the top drivers of satisfaction is one area in which employees are most satisfied—“care (concern) of management”—and one of the top drivers of satisfaction is one of the areas in which employees are least satisfied – “assistance with job stress.” Also worth noting, two of the items that receive the highest percent “excellent” scores from customers are actually among those *least* associated with recommendation scores—“sense of accomplishment” and “respectfulness of staff.”

Again, just because items are less correlated with recommendation results doesn’t mean that they are unimportant. But it is helpful to understand that some of the areas where assisted living communities excel as employers are not the same functions that are most likely to result in an employee recommending the organization as a place to work.

The consistent theme in the top drivers of employee recommendation is the role of management—concern, attentiveness, clear expectations, and support or assistance with job stress all speak to the relationship that employees feel they have with managers. It emphasizes the opportunity that improved management skills, activities, and behavior have to impact the work environment for employees, thereby improving satisfaction and commitment to the organization, and in turn having a positive effect on resident experiences with the community.

One of the most useful things about understanding the biggest drivers of satisfaction is using those areas as priorities for performance improvement efforts. Especially for an organization or a leader that is unsure where to start, evaluating performance in these four measures and identifying which offer the most opportunity for improvement (either due to low relative scores within the organization or low scores compared against a benchmark) can help focus efforts not only on measures that could benefit from improvement, but those that will also have the greatest impact on an individual’s overall satisfaction with the community.

### Range of Performance

One frequent question and subject of conversation when it comes to performance improvement activities is around the possible scores or levels of improvements that organizations can reasonably expect to achieve. In this year’s National Research Report for assisted living, we provide partial answers to those questions in the form of data around the “top quartile” level of performance among individual communities included in the survey database. That is to say, we have identified the scores that at least one out of every four communities have achieved or exceeded (see figures 25 and 26). When it comes to employee satisfaction, 25% of communities earned at least a 35% “excellent” score and an 86% “excellent” or “good” score to the overall satisfaction question. The positive benchmark is identical for the “recommendation for job” question, but the “excellent” benchmark is 42%.



Figures 25, 26

For customer satisfaction, at least one out of every four assisted living communities earned a 100% positive response from both residents and family members to both the overall satisfaction and the recommendation measures. For the higher-level score of “excellent” alone, the benchmarks for the top quartile performers are 57% from residents for overall satisfaction and 63% for recommendation for care, and 63% from families for overall satisfaction and 67% for recommendation for care.

These scores are not seen as exclusive to an elite few organizations—they are very reasonable goals for communities that already exceed the national average but don’t meet these lev-

els of performance. It is also reasonable and admirable for leaders to strive for an even more elite standard. The 90th percentiles of performance—the level that only 10% of all assisted living companies achieve or exceed—raise the bar to 50% for excellent and 95% for positive overall satisfaction scores from employees, and to 54% excellent and 96% positive recommendation scores from employees. The 90th percentiles of performance for customer satisfaction are 75% excellent overall satisfaction from both residents and families, and 78% and 79% excellent recommendation scores from residents and families, respectively, for recommendation for care scores.

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# CONCLUSION



### CONCLUSION

Assisted living organizations play a unique and vital role in the long term care continuum. Providing a home, services, and a community to approximately 1 million people, giving them a place to maintain their independence along with the support to do so, these communities are often an optimal option for seniors and their families.

Feedback from residents, families, and employees provides leaders and advocates of the assisted living profession unparalleled insight into the value of their services, plus opportunities to continue to improve those services, increase value, and boost consumer perceptions going forward. The development of a national database of standardized survey responses for assisted living communities offers a source of knowledge for comparing the results of individual organizations against peers, offering data-rich insights into this segment of long term care, and deeper levels of research into the expectations and values of assisted living customers and employees.

The entirety of this report creates the opportunity to fuel improvement. Individual communi-

ties can discover what is possible, in addition to what they should be striving for in comparison to the performance of their peers. Managers can identify how important their role and relationships with customers and employees are in the bigger picture, as time and again we see that the way managers and leaders interact and respond to both customers and employees drives overall satisfaction with communities. Those looking out for and leading the direction of the profession as a whole gain more data, a clearer picture of the people affected by assisted living, and use this information to reinforce organizational decisions and conversations.

With a more complete understanding of the experiences and perceptions of employees and customers, assisted living providers will be better prepared both to maximize efforts around creating cultures of person-centered care and adapting to shifts in the healthcare landscape due to a variety of factors that impact the profession. In addition, this information can be used to further the causes of the assisted living profession, from staff and customer engagement to public relations and advocacy.



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