



PROGRAM IN SENIOR HOUSING CREATES CRITERIA FOR UNIVERSITY RETIREMENT COMMUNITIES

Fairfax, VA (01/20/2006) ---The George Mason University Program in Senior Housing Administration has created criteria to assist consumers seeking retirement housing integrated into their alma mater or other university or college. It is believed that more than 100 such communities are under consideration or already in existence nationally, making them among the fastest growing segment of the rapidly growing senior housing industry. Their growth is expected to continue as college educated baby boomers approach their retirement years.

“University Based Retirement Communities”, or “UBRC’s”, represent an entirely new form of housing option for seniors, according to Andrew Carle, director of the Mason program, and a national expert on such communities. Carle created the criteria and UBRC acronym to address what he calls “a broad disparity among current models” in terms of connection to their host academic institutions.

“Current retirees and boomers coming down the pike are the most educated demographic in the history of the world”, states Carle. “But what they feel they will be getting when they move into a university retirement community may or may not be what the community actually has to offer.”

Criteria for a community to be defined as a UBRC include:

- A location within an accessible distance (preferably one mile or less) of core campus facilities, such as theaters, sports complexes, and classrooms. “We’ve seen communities list themselves as university related in their brochures, but that’s hard to back up when they’re located several miles from campus”, says Carle.
- Formalized programming that ensures integration between community residents and university students, faculty and staff. “This can’t be a ‘decide as you go’ arrangement,” says Carle. “There should be written letters of agreement between the community and academic units detailing the ability of residents to audit classes, attend events, and use campus services.” In addition university involvement should be “inbound” to the community, in the form of student internships, paid and volunteer work opportunities, and potential research related to senior housing environments. “What makes this a new form of housing is that it is literally intergenerational as opposed to just retirees,” says Carle.

In order to meet the dual programming criteria, Carle suggests a coordinating entity, such as an academic department, that maintains an advisory board of representatives from both the university and housing provider. This in turn could include someone such as a “Dean of Residents” to both monitor and manage program content and quality.

- A requirement that such communities include the full continuum of senior housing services, including independent living, assisted living, and skilled nursing and dementia care as needed. “Many of these are set up only as independent living, but who’s going to tell the retired university president they have to move when they begin to need extended levels of care?” warns Carle.
- A documented financial relationship between the university and the senior housing provider. “That doesn’t mean the school has to own the community,” says Carle. “To the contrary, there have been some financial disasters when this has taken place, and universities probably don’t want to take on the risk scenarios involved in providing long term care.” Still, he argues, arrangements such as a long term land lease, and sharing of common needs such as landscaping, parking, and purchasing contracts ensures that both parties “have a stake” in the success of the community.
- Finally, communities should be able to document that at least 10% of residents have some connection to the university, either as alumni, retired faculty or staff, or family of the same, in order to be called a UBRC. “This is usually more of a challenge for urban schools – whereas with rural schools it may be the main sales feature and reach 50% or more.” says Carle, who adds that such a resident presence is important in order to bring the “culture and feel” of the host institution into the community.

According to Carle, all five criteria are designed with a single purpose in mind, to provide retiree’s assurances of receiving the active and intellectually stimulating quality of life they desire. “Most of these communities start out well intended, but you don’t want to end up with a ‘stranger on campus’ scenario five years down the road.”

Using the criteria for a UBRC, the Mason program hopes communities will strive to achieve such status, while others can continue to describe themselves as “linked” or “affiliated”. The University also hopes to start a national association of such communities to help foster their development and growth. Among current communities, Carle lists The Village at Penn State, Classic Residence by Hyatt - Palo Alto (Stanford), Oak Hammock at University of Florida, and Lasell Village at Lasell College as among those closest to meeting the UBRC definition.

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