

Toolkit for Moving

A guide for staff supporting older people
moving to a retirement community



This guide is designed for staff who will be supporting older people when they are



Making the decision to move to a retirement community



Making the move to a retirement community



Adjusting to life in a retirement community

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Overview of resources

This guide is designed to help staff support older adults moving and adjusting to a retirement community. The resources included may help to provide advice on how to best support older adults during the move and will also provide a drafted welcome pack which may be useful for you to edit based on your community and/or village and share with residents.

How we created this guide

There are two funded studies that contributed to the development of this guide.

The Pargiter Trust funded 'transitions project' had two studies. In study 1 we interviewed 25 residents across 3 retirement communities who spoke about their own experiences of moving to a retirement community. In study 2 we searched for all the existing research about the experience of moving to a retirement community.

The ESRC IAA funded 'kinder communities' project involved three parts. In part 1 we held discussion events at 4 different retirement communities where we spoke

with 51 residents about the sort of support people felt could be useful at different stages of their move. In part 2 we shared an online survey with staff where 59 staff working across the UK told us what support they felt helped residents at different stages of their move. Finally, in part 3 we went to a retirement community where we refined ideas for what we could include in the guide with both residents and staff.

This guide is therefore informed by:

- Existing research studies
- Interviews with 25 residents
- Discussion events at 5 retirement communities
- Staff survey

Who created this guide

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Supporting older adults to make the decision to move



Providing general support to people making the decision to move

Older people who are making the decision to move will want to learn what it is like to live in your retirement community. Below are some suggestions for information that you might want to provide to potential new residents



Organise visits

Run open-day events, invite people to visit the community and introduce potential residents to current residents. Potential residents want to look see what their new home and community are like. Facilitating meetings with current residents is important so potential residents get a sense of who their neighbours could be.



Provide practical information

Give potential residents information about the resources and facilities in their new community – most people are concerned about opportunities to socialise, health, support and safety.

- Information about opportunities to socialise are values by potential residents as one of the key draws to retirement community living is to feel like they are part of a community.
- Information about any adaptations that are made to the community to support independence will be valued by potential residents as they often move to this setting as it is more inclusive to their ageing needs.
- Information about any on-site health support or care packages (if applicable) are valued by residents as many have concerns about their current or future health. Information about the support you provide with things like maintenance are valued by potential residents as many people move because of difficulties maintaining larger homes and gardens.
- Information about the safety and security within the retirement community is valued as potential residents wish to move to housing where they will feel safe as they grow older.



Provide realistic information

As much as possible provide realistic information about the pros and cons of living in a retirement community. Many current residents can be disappointed when their experiences of living in a retirement community do not match up to what they were sold. Here are some pros and cons we found in our research:

Some of the pros of living in a retirement community can include:

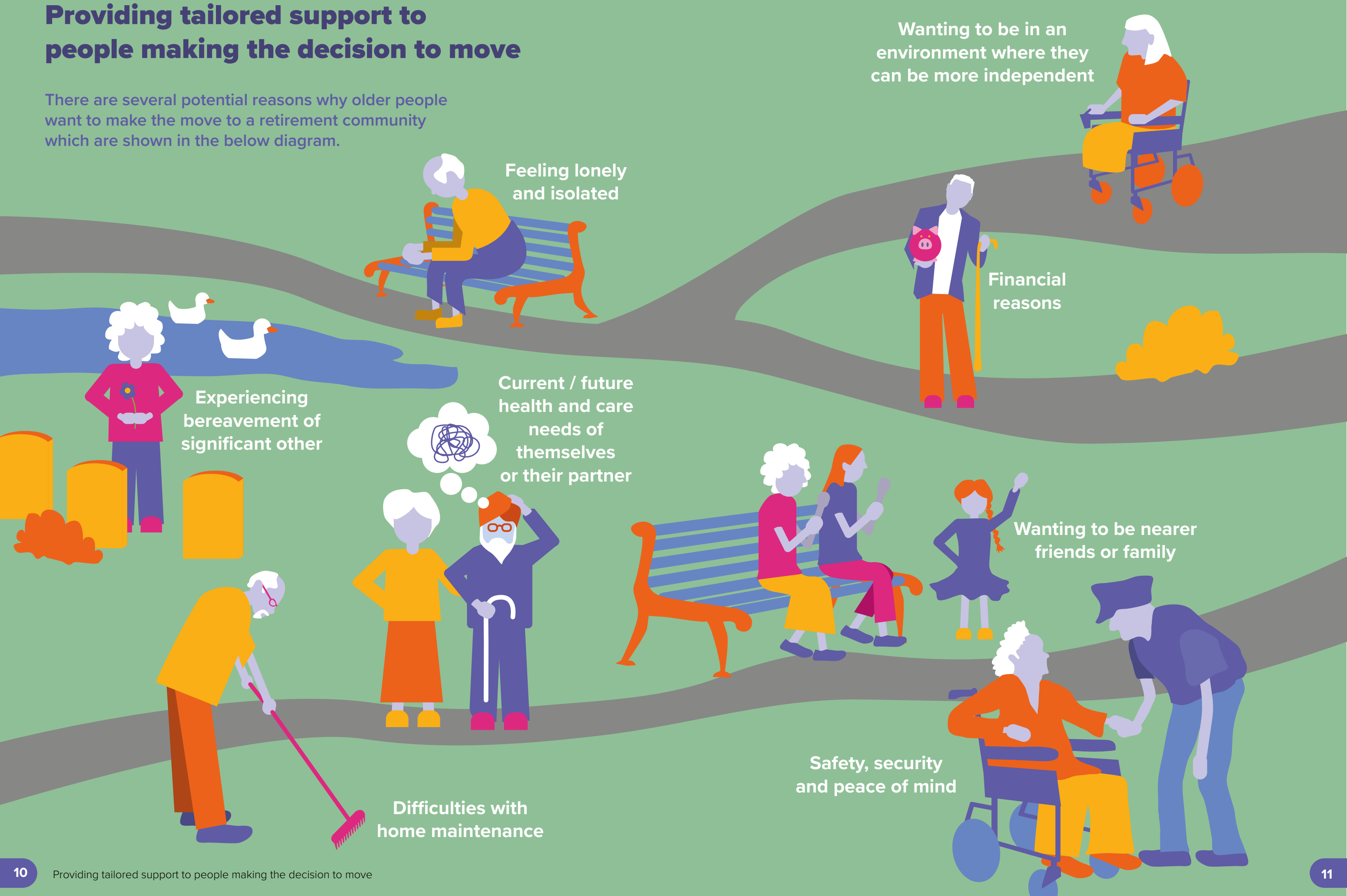
- Living in a space that is adapted for your needs as you grow older
- Being in an environment that feels safe and secure
- Peace-of-mind for you and your loved ones
- Having access to additional support for your health and home maintenance
- Informal care and support from other residents
- Having access to a range of facilities and clubs
- Companionship
- Being around lots of other like-minded people
- The feeling of togetherness that comes from living in a community
- Feeling lucky or grateful to live in the community

The cons linked to retirement community living can include:

- The difficulties trying to integrate yourself into a new community that feels cliquey
- Adapting to any rules a community may have
- Gossiping amongst residents
- Moving away from a home where you had a lot of support to a place where you don't know anyone
- A lack of diversity in residents
- Feeling lonely and isolated if you don't feel like you belong
- Negative attitudes towards people with additional support needs (particularly in those communities sold as independent living)
- One of the main stresses linked to moving to a retirement community as reported by research and residents is downsizing (moving into a smaller home). Many people report that having to give up treasured possessions to live in a smaller space can be very difficult, and for them a big con of retirement community living is the process of downsizing.

Providing tailored support to people making the decision to move

There are several potential reasons why older people want to make the move to a retirement community which are shown in the below diagram.



Wanting to be in an environment where they can be more independent

Feeling lonely and isolated

Financial reasons

Experiencing bereavement of significant other

Current / future health and care needs of themselves or their partner

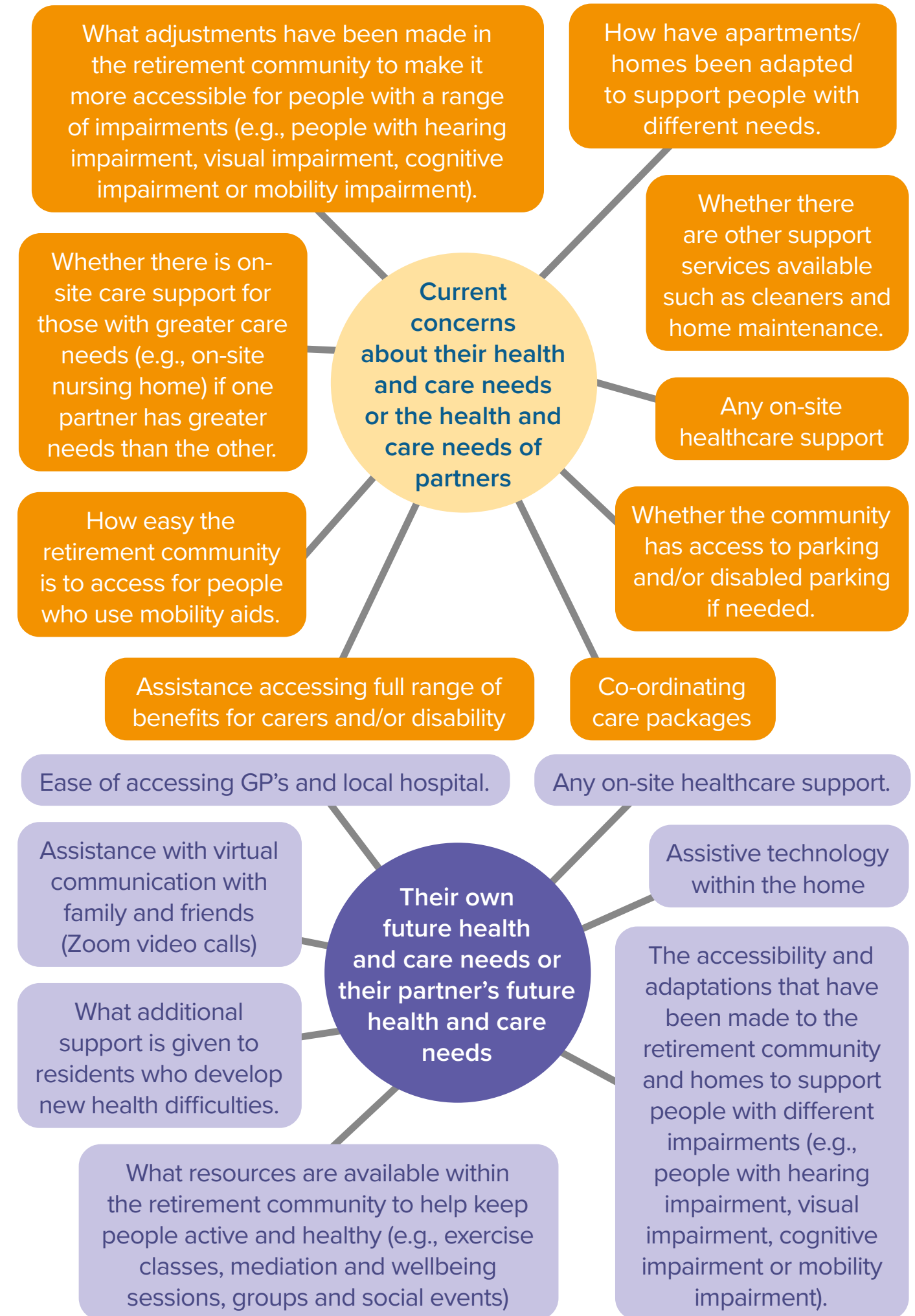
Wanting to be nearer friends or family

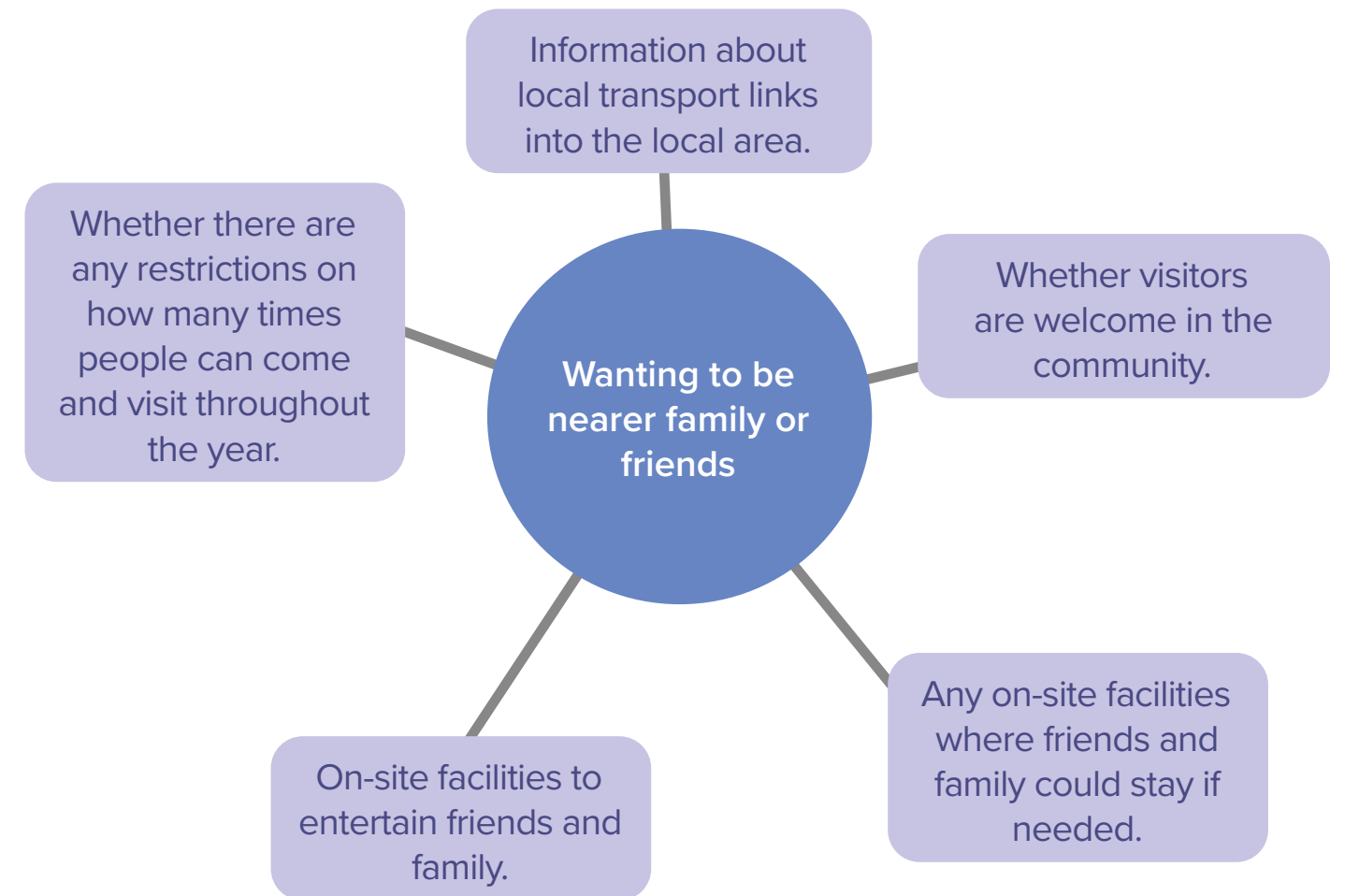
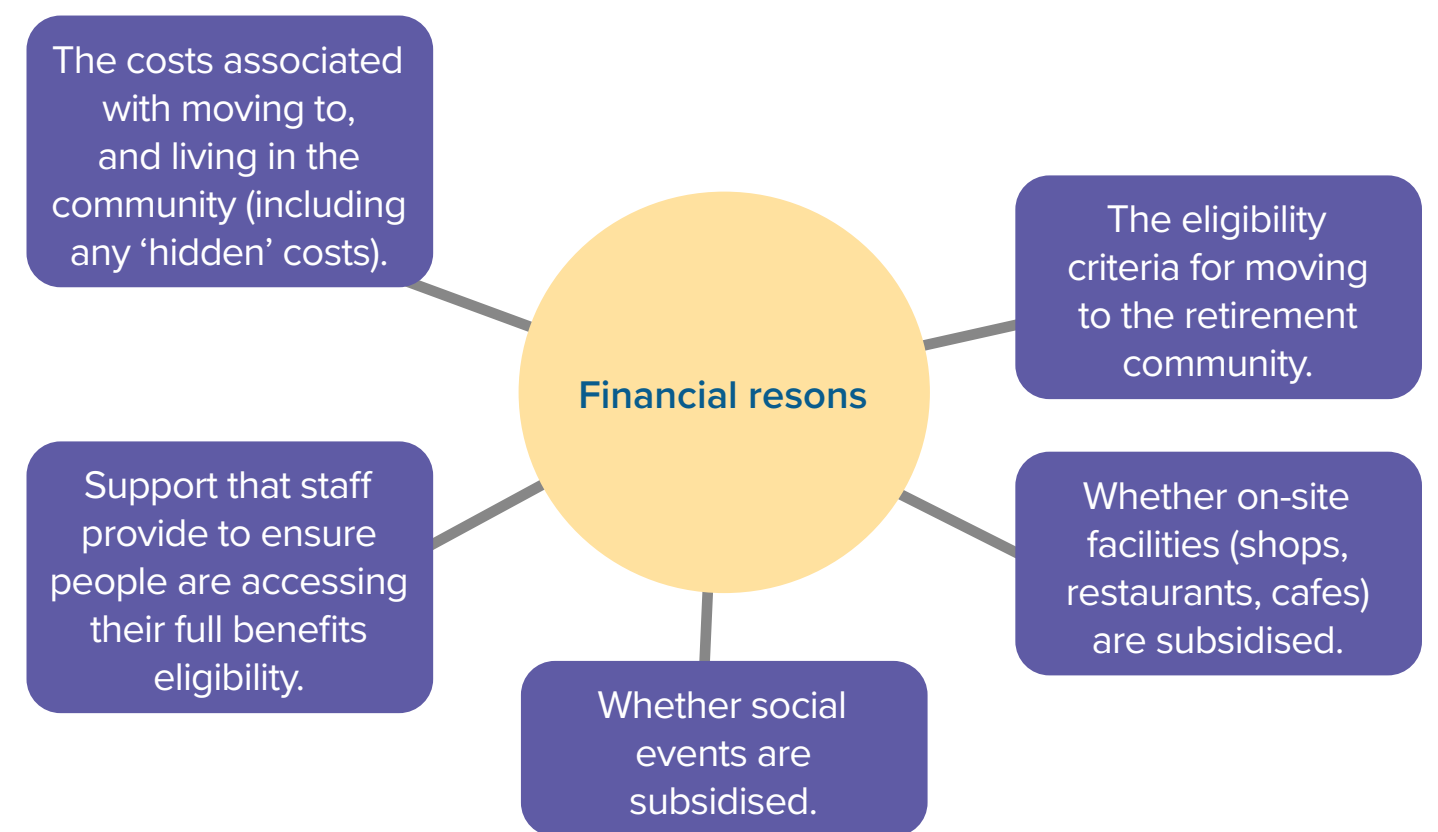
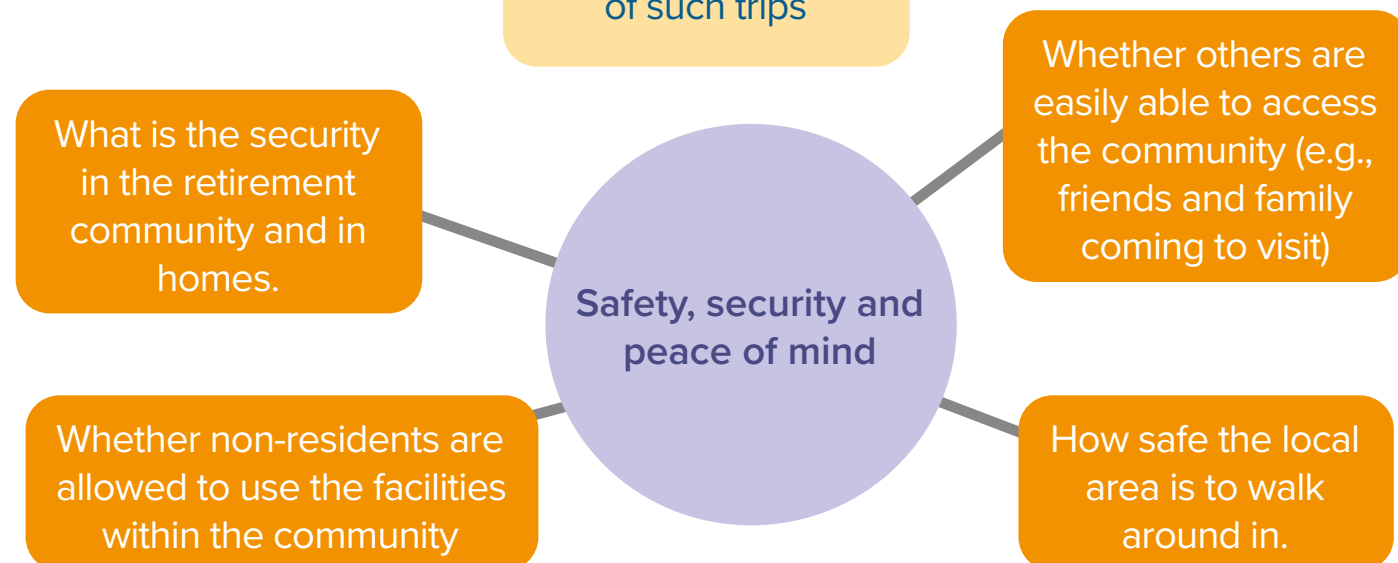
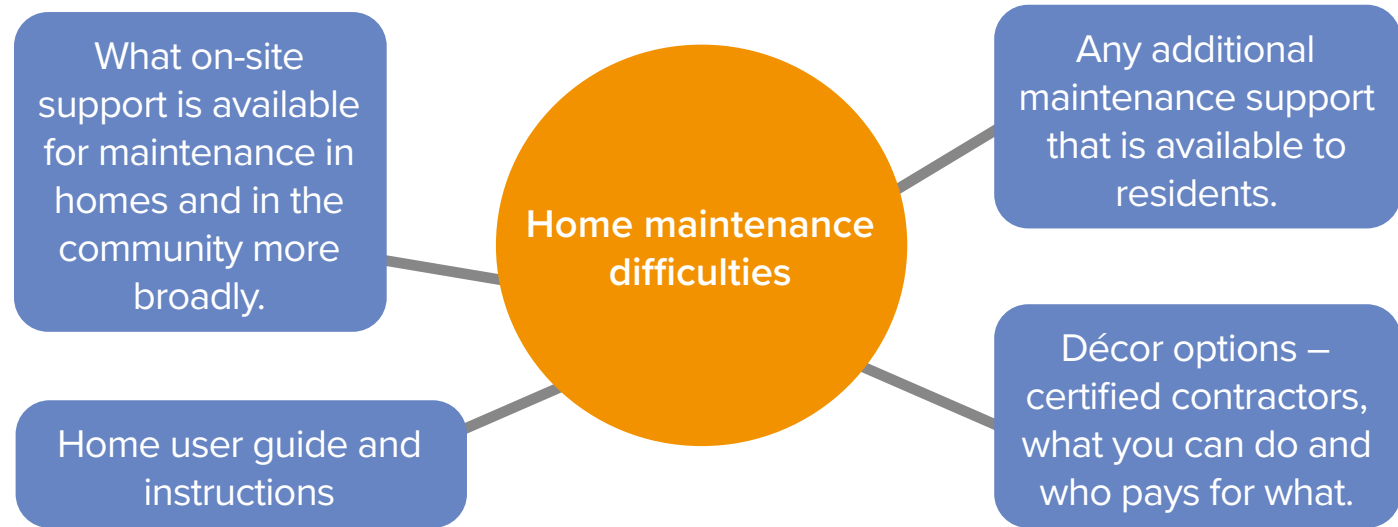
Difficulties with home maintenance

Safety, security and peace of mind

The support that older people need in making their decision may differ based on why they want to move. People may want to move for more than one reason. Asking potential new residents why they wish to move could help you provide them with more tailored advice.

In the following diagrams we outline some of the main reasons that people may want to move and the related aspects of your community that you may want to think about discussing with them.







How to support older adults when making the move



Providing general support to people making the move

Below are some suggestions on how you could help new residents as they start to make the move from their previous home to the retirement community.

Provide information

We have created an evidence-based guide for residents designed to help them with every step of the move “[Guide for older people moving to a retirement community](#)” – this is a free resource you can share with new residents. You can download the guide [here](#).



When we spoke with current residents they were really keen to be given practical information about their new community when they are making the move. This includes things like local bus timetables, a map of their new retirement community and a list of GP surgeries where they could register.

In our example welcome pack (available to download [here](#)) you can see a list of amenities that older people shared with us that they would find useful to know about. Sharing a list of these amenities before people move could help them to feel like they can prepare for the move and be more in control.

One of the main reasons that people want to live in a retirement community is to feel part of a community and meet other people. Before people move it could be worth sharing the kinds of events and opportunities to meet others that are available to new residents.

Organise a meeting

It can be helpful to have an initial meeting with new residents where staff members can get to know them, understand what they want to achieve from the move and then signpost onto any further support services if needed.



Support with downsizing

One of the main things that people find difficult when they make the move to retirement community living is downsizing. There are two main ways that people find helpful to downsize: the first is giving items to family and the second is giving items to charity. If you have preferred charity partners or a shop where residents can donate items this could be a good point to let them know about where they could donate items



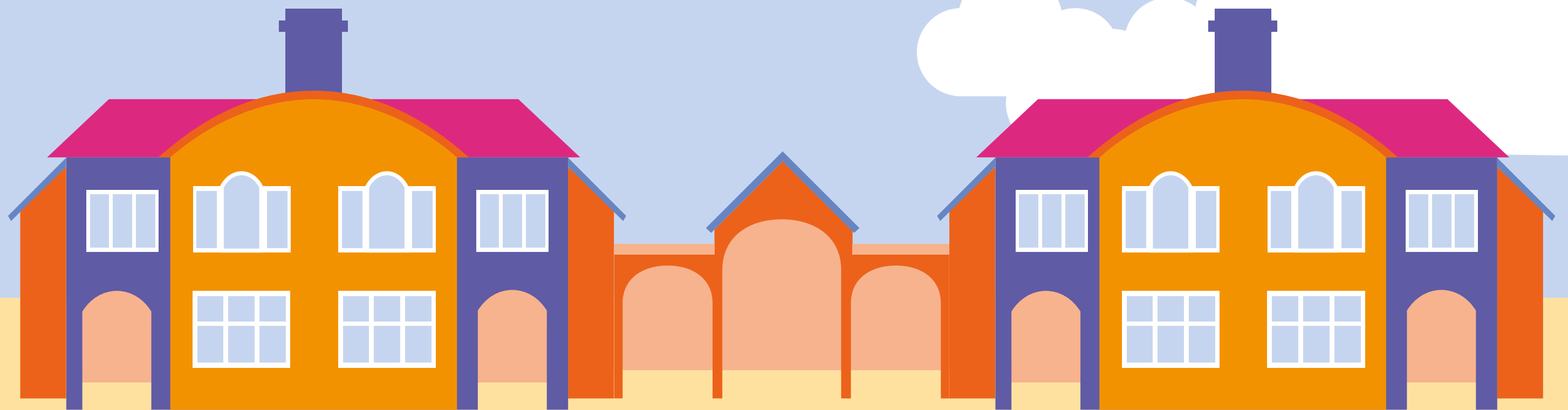
Support with the move

As people make the move to the retirement community they will need to cancel and amend existing bills. It would be helpful for new residents to know what bills they might need to set up in the new community or if these are included (e.g., electricity, gas, internet, phonenumber). In either case, providing a list of providers could help new residents to know who they need to register with or who will be providing their amenities. In our guide for residents, we have a timeline of things to prepare for as they make the move that you might feel is useful to share.





How to support older adults adjusting to the move



General guidance for how to support people adjusting to life in a retirement community

Below are some suggestions on how you could help new residents as they adjust to life in the retirement community

WELLBEING

Residents appreciate being shown around their new accommodation and shown how things work

This is particularly the case in homes that have new technology which some new residents may need help learning about (e.g., voice activated technology for controlling lights and heating).

Residents may need to be provided with information about the retirement community gradually.

Moving in can be an overwhelming time. Rather than give people a lot of information all at once it could be worth having some regular informal meetings when they move in where you can share information gradually.

Be mindful of how much paperwork you need to share with new residents. A big pile of papers can be overwhelming and get ignored.

Consider giving new residents printed information in a tiered way, so they have time to digest the information at different stages of settling into their new homes and community.

Check with residents what support they feel they need.

Different people need different things at different times when they move in. Some want to join in straightaway and others adjust slowly. Some want to join in every activity and others are happier with their own company. Adapting how you work with different residents could help them to settle in.

Encourage current residents to be kind to new residents when they move in.

The initial experiences that older people have when they move into a retirement community can be formative in terms of how they settle in. For example, when new residents have unpleasant interactions with current residents soon after moving in this can lead to them withdrawing from others in the community.

FINANCE

New residents may need support with changing their address on different bills and benefit payments.

This is the case when resources and support is only available online. Some residents told us that they struggled with online banking for example. Helping residents identify useful phone numbers and addresses could help them when they are less comfortable with the internet.

Share information about sources of financial support.

If resources allow, sitting down with residents to discuss the benefits they currently access and additional funds they are entitled to is hugely appreciated.

LEARNING ABOUT COMMUNITY LIFE

Inform residents about the support services available and the social events and activities that are being run.

This is particularly the case as they adjust to life in the community.

Keep residents up to date with community life by providing regular updates and communications.

This could be through a newsletter, forum or notice board.

Help new residents meet others and settle into their community.

This could include setting up a buddying system (see pages 28 to 29 for how to do this) or running welcome events. One of the most difficult and important parts of adjusting to life in the retirement community is feeling like one is part of the community. Talking to current residents about the best way to do this could help you when working with new residents.

Advice from staff and current residents

We asked staff and current residents what advice they would give to people when moving into a retirement community that could help them settle in. Below are some of the things that participants suggested, with an additional section focusing on how staff may help



Give yourself time

Moving to a retirement community is a significant step in a person's life, and for

many people it can take a while for them to feel at home there.

Alongside feeling at home you will also need to get to know other residents, find your way around in your new community, find out who you need to contact for support and learn about all the activities you might want to take part in.

When you bear all this in mind it is understandable that it might take you longer than a few days to feel settled in. Be kind to yourself and give yourself permission to take the time you need to get used to your new home.

How can staff help? Check in with new residents once or twice as they are adjusting to life in a retirement community, give residents their space and try not to overwhelm but rather encourage some engagement while also respecting their boundaries.



Try something new

There could be lots of new activities and clubs and things to try in your new

community. This can be a real opportunity for you to try something new or different! Some residents have reported being surprised at the things that they have enjoyed once moving to a retirement community, and treating this move as an opportunity to try new things can be enjoyable.

How can staff help? Have a meeting with new residents to discuss what they like and/or want to try so that you can make suggestions, provide a variety of social groups and activities, provide new residents with information about what is available in the local area.



Get involved

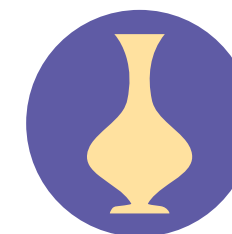
One of the main things said by both staff and residents is that it is important to try and

get involved in your new community. This can be through group activities and clubs, through volunteering or going to coffee/tea with other residents.

Both staff and residents recognise that everyone may not want to get involved immediately, and that sometimes you need a little time to settle in. They also recognise that not all people will want to get involved in everything, but there can be small ways you can get involved in your community which can help you meet new people and feel part of the community.

Both staff and residents shared concerns that some people may become lonely and isolated in the community and that getting involved in an important way to avoid this.

How can staff help? Advertise social groups and activities to ensure residents know about them, provide a variety of different social events so that there is something for everyone, gently encourage residents to engage.



Buy yourself something new

When moving to a retirement community people think a lot

about downsizing and having to give up personal possessions. However, residents have shared that it can help to buy yourself something new that will look nice in your new home. Sometimes the furniture and furnishings you had in your old house may not look right in your new space, so it can be worth thinking about new things that are better suited to that space.

How can staff help? Provide residents with information about shops in the local area, be there to support residents with downsizing and signpost if needed.



Reach out for support if you need it

If you are finding the transition difficult,

remember that you can reach out to the support services available in your community. Staff are there to provide support when you feel you need it or will have access to further services they can link you in with.

How can staff help? Have staff members available for residents to talk to and ensure that staff are aware of additional services they can signpost residents to.



See what support is available to new residents

When moving to a retirement community

there will be lots of staff who are employed to support you on-site. There are often lots of people who have different responsibilities for supporting residents. Getting to know what support is available and who to contact is important (to help you with this we have the 'who to contact' resource on [page 56](#)).

It is also worth being aware of what specific support is available to new residents. Some retirement communities have welcome events for new residents. Some have buddying schemes where you are paired with another resident when you move in who shows you round and helps introduce you to others. It is worth asking your new community whether this kind of support is available to you as you move in.

How can staff help? Provide residents with information about staff members (including their name, role and contact hours – see welcome pack template), introduce new residents to staff members who you feel they would need to know (e.g., managers) and utilise the expertise of different staff members.



Approach the move with a positive mindset

Moving to a new home can be

challenging and it is important to remember this during the moving process. Despite the challenging parts of moving, residents and staff highlighted the importance of approaching the move with a positive mindset. Try to think about how retirement living could help you and the new opportunities it can bring, such as meeting new people and getting more involved in group activities.

How can staff help? Recognise the challenges that may accompany moving to a retirement community, discuss the positives of retired living with residents (e.g., security, independence, social connections, support always being available etc) and check-in with residents as they are adjusting.

Setting up a buddy system

Below is some guidance and advice for setting up a buddy system in your retirement community. This has been included as results from our studies where we spoke to staff and current residents told us that this could be a useful resource to help residents adjust to life in the retirement community. These points are just some tips! You may have a specific way you would like to implement your buddy system.

During the development phase

Consider the practicalities of setting up a buddying system at your retirement community (e.g., do you have enough current residents who would be interested).

Ensure that you have the staff available to plan, set-up and monitor the progress of the buddy system.

Advertise and explain the buddy system and why it is being implemented to residents. This could be done using posters or by having a discussion in a community forum. It is important that residents understand the buddy system and the reasoning behind it.

Have a discussion with new residents about the buddy system to see if it would interest them.

During the implementation phase

Try to match buddies based on those you think would get along – those with a shared interest may be a good place to start. To help with this, you could ask those interested to answer a couple of questions about what they like to do (their hobbies and interests) and then match people this way. No matter how you do it, you need to try and ensure that the buddies are well matched.

Make some recommendations for what the buddies could do when they first meet up (e.g., go for coffee). This may help make the initial link which they can take control of after.

Allocate a staff contact for the buddy system – this would be the staff member that residents contact to find out who their buddy is and to address any queries or issues they may have (e.g., not getting along with their buddy).

Put a time limit on the buddying relationship – so everyone knows its time-limited and specific rather than ongoing or drifting.

Following implementation

Check-in with residents using the buddy system to see how it is going.

Receive feedback from residents on how they have found the buddy system (e.g., what they found helpful, what they found hard, how it may be improved).



Draft welcome pack

We have created a template of a welcome pack that different retirement communities can edit and then give to residents when they first make the move. The welcome pack aims to help make the transition to a retirement community easier for older adults.

By providing this template, we also hope that it will be easy for staff to use, navigate and personalise for their specific retirement community.

To download a copy of the welcome pack check the [website](#)



