

Transitions

Listening to resident voices to understand and support the transition to retirement community living



Acknowledgements

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REPORT TEAM

Dr Kimberley Smith
(University of Surrey)
Senior lecturer in Health Psychology

Professor Andrew King
(University of Surrey)
Professor in Sociology

Alison Benzimra
(Whiteley Foundation for Ageing Well)
Foundation manager

Julie Round
(University of Surrey)
Research assistant

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Learn more about our ongoing and planned research here:

www.kinder-communities.com

To feedback on the report or to join us for the second part of this project in 2021-2022 email Kimberley Smith:

Kimberley.j.smith@surrey.ac.uk

Key points

The goal of the ‘transitions’ project was to better understand the experience of moving to, and adjusting to life in a retirement community, to produce a framework for understanding those transitions so that we can develop practical ways to support people.

In this report we combine findings from interviews with 25 residents living across 3 retirement communities in the UK, plus an overview of themes from worldwide research where residents have been asked about their experience of moving to a retirement community.

We found that there is a process that most people experience when they move to a retirement community. This process comprises of different but related transitions:

Transition 1: Deciding to move

Transition 2: Moving

Transition 3: Adjusting

Transition 4: Living in the community

At the heart of this process is how the person navigates these different transitions. **Navigating change** depends on a wide range of factors such as personal characteristics and personality, the amount of choice a person has had in these transitions, the support they have from friends and family, and the activities and support they receive from the retirement community they move into.

Using findings from our studies we have created our ‘**transitions framework**’ – which shows the transitions that people go through when they move to a retirement community. This framework considers the wide range of different factors that influence how different people navigate these transitions, as well as what helps and what hinders them.

We share suggestions for residents moving to these communities – and invite feedback from people working in the UK retirement community sector about these suggestions.

In order to be able to support people making these transitions in a retirement community setting we invite you to join us for the next phase of this research project where we will be developing practical ways to use our framework to support people through retirement community transitions by creating kinder communities.

About the study

The retirement community sector is projected to increase in size by 10% over the next 5 years. As more people move into retirement communities there is a need to make sure that we can support people as best we can with this move.

Moving home is commonly spoken about as one of the most stressful experiences we can experience. Moving to a retirement community can be a major life change, but there is a lack of evidence that tells us how we can support people as they make this change, and the kinds of things people have to adapt to in retirement community living.

To better understand what it is like to move to a retirement community we need to listen to resident voices. In 2020 the UK Government published its Charter for Social Housing Residents, which emphasised the importance of listening to and engaging with residents and understanding what they want from their housing. Our project aimed to provide important evidence in this respect and learn from and amplify residents’ experiences and concerns.

To engage with resident voices about experiences of moving to a retirement community we conducted two studies.

In the first study we interviewed 25 residents living in three retirement communities in the South-East of England about their experiences of moving to their retirement community, and ongoing life in the community.

In the second study we identified all worldwide studies where residents of retirement communities had been interviewed about their experience of moving to independent and/or assisted retirement communities.

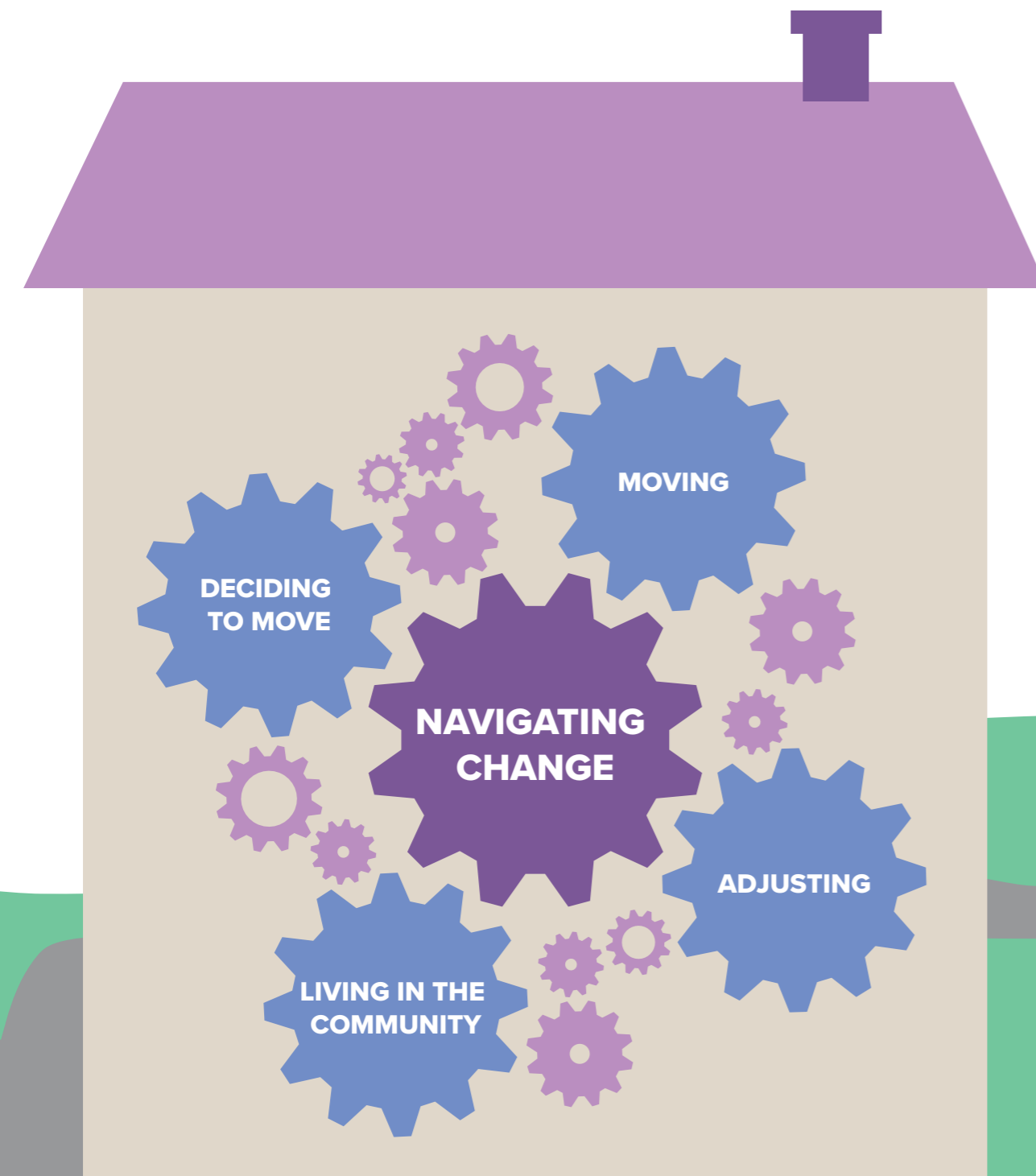
More information on these studies can be found on our project website: www.kinder-communities.com/transitions-project-1

We have synthesised the results of these two studies to create our Transitions Framework.



The Transitions Framework

We are using the imagery of cogs to demonstrate that moving into, adjusting to and living in a community are part of a process (a transitions process) which is dynamic: as new residents enter the community and broader changes impact the community and individuals.



There can be 'spanners in the cogs' which hinder people's ability to navigate change, but factors can also 'oil the cogs' to help people navigate change and get the process moving again.

Across the community different people are navigating their own changes and lives, but are also all connected in the same community (paths) - one person's transitions and life are all part of a broader context of community transitions and community life.

This overall Transitions Framework comprises several different elements, represented by the 'cogs'. We will cover these in more detail over the following pages:

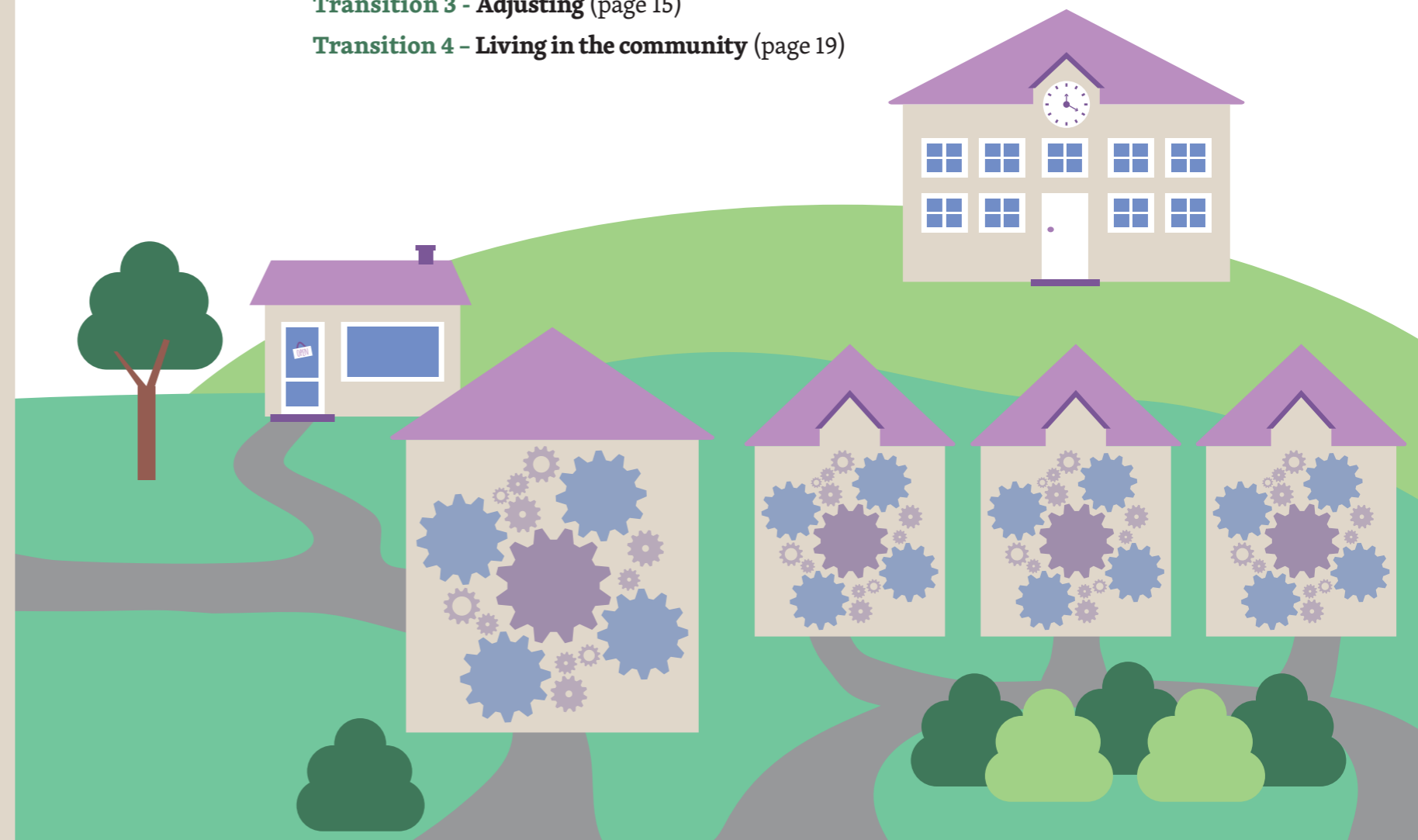
Navigating Change - the core of the framework (page 7)

Transition 1 - Deciding to move (page 11)

Transition 2 - Moving (page 13)

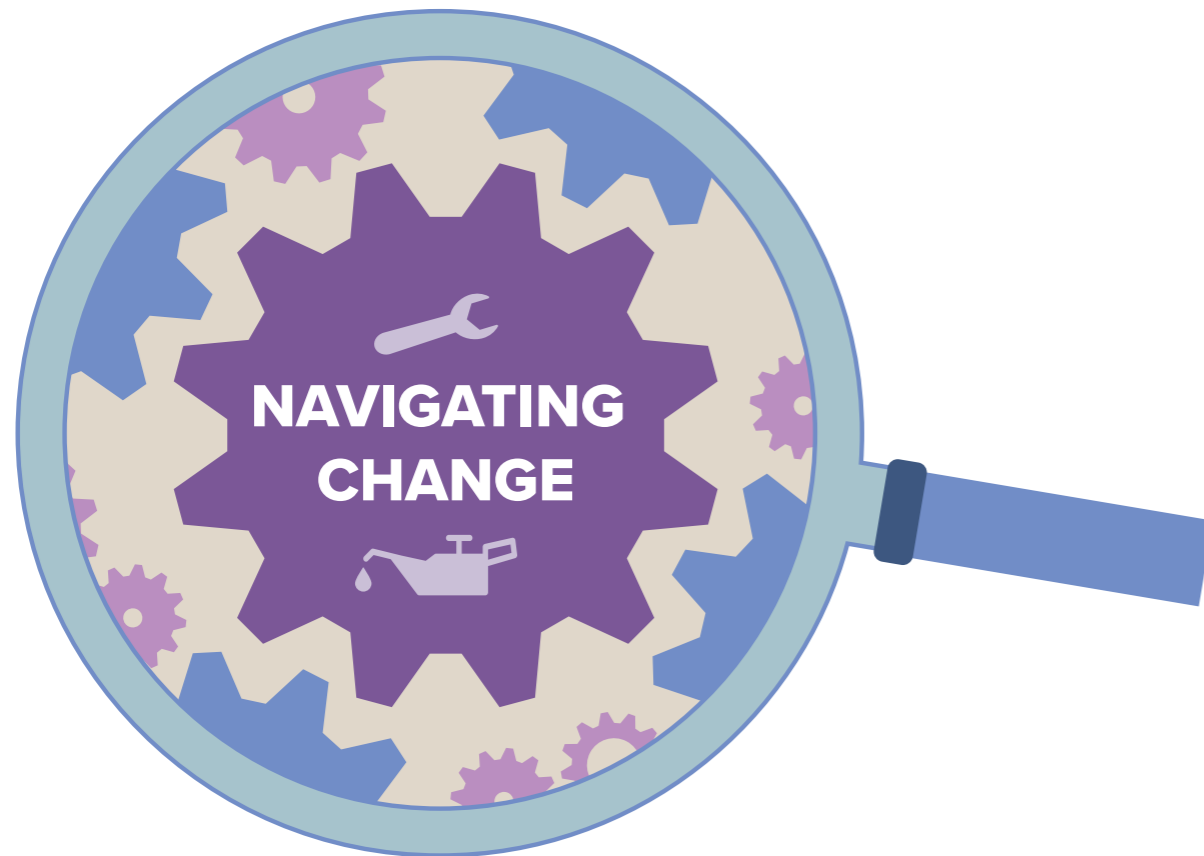
Transition 3 - Adjusting (page 15)

Transition 4 - Living in the community (page 19)



Navigating change

The core dimension that sits at the heart of the framework is 'navigating change' - this represents the different factors that can 'oil the cogs' and 'put a spanner in the cogs' as people adapt to living in a retirement community



It is made up of different social and community factors, individual factors and situational factors (outlined on the following pages). Different people will rely on different factors as they navigate different transitions during their move.

SOCIAL AND COMMUNITY LEVEL FACTORS INVOLVED IN NAVIGATING CHANGE

Community support - The support that people get from others in the community is important for helping them navigate change. Aspects of community support that can oil the cogs include general neighbourliness and friendliness, supporting one another through difficult times, reaching out to those who may need extra help and having a broader sense of belonging and togetherness in the community. Aspects of community support that can put a spanner in the cogs include not feeling part of their community, not having the support that they desire from others, being bullied or gossiped about and feeling isolated from others in the community.

Community environment - The physical environment of the retirement community is important for resident wellbeing and navigating change. Aspects of the community environment that oil the cogs include being in an inclusive and accessible environment, having access to communal facilities such as community shops and cafes, having a private space to relax in, and easy access to greenspace and natural environments. Aspects of the community environment that put a spanner in the cogs include a non-inclusive physical environment (e.g., not adapted for people with different support needs), a lack of communal spaces to interact with others, a lack of private space and a lack of greenspace.

Staff - Staff are a key part of the retirement community, and having good staff-resident relationships is important for resident wellbeing and helping them navigate change. Staff help residents oil the cogs and navigate change by providing practical support (particularly signposting to support and help with maintenance), and emotional support when the resident struggles. However, there can be spanners in the cogs when staff are less visible, when there are lots of staff changes, when there is a lack of clear communication from staff and when residents are not sure how to contact staff.

Safety, security, care and support - One of the key elements of community life that helps the resident navigate change is when they feel they obtain safety, security, care and support from their retirement community. Safety, security, care and support helps residents' oil the cogs as it gives them a sense of stability and access to resources that help them to cope with, and be supported with different changes. However, there can be a spanner in the cogs when residents feel less secure, less supported and like there may not be the care they need in the community.

Support of friends and family - Having support outside of the community is just as important as support inside the community in helping residents navigate change. Friends and family help the resident oil the cogs by providing the resident with emotional and practical support, and having regular contact with the resident. However, there can be spanners in the cogs which include not having the support from friends and family that they want or need, and not being able to see or speak to their friends and family as often as they would like. Where residents don't have family or friends to support them, this can lead to them relying more on community support. Regardless of where support came from, feeling as though one had support from people who cared about you was important for navigating change.

Moving in as a cohort, or moving into an existing community - The experience of moving to, and adjusting to life in a retirement community can be very different depending on whether residents move into an existing community, or as part of a larger cohort who all move in together (sometimes called 'phases'). When residents move in as a cohort this can oil the cogs when there is shared camaraderie as people form bonds and navigate change at the same time. However, there can be spanners in the cogs when people don't feel that they like the people that moved into the community when they did. When residents move into an existing community, things that oil the cogs include feeling welcomed and supported by existing residents and staff. However, there can be spanners in the cogs when the new resident feels it is hard to navigate existing cliques, lacks the confidence to put themselves out there and has to navigate unwritten rules of conduct for their community.

INDIVIDUAL LEVEL FACTORS INVOLVED IN NAVIGATING CHANGE

Life history – All people moving into these communities have a rich life history that shapes how they navigate change. All life transitions are interpreted in light of previous experiences. Aspects of life history that can help oil the cogs include previous experience of living in communal housing, previous experience of having moved around, feeling that the community provides them with a sense of stability and security they feel they have not previously had, and moving into the community at a time of relative stability in their lives. Aspects of life history that can put a spanner in the cogs include leaving a lifelong treasured home full of memories, moving at a time of personal upheaval, and feeling that the life experiences that one has had are very different to other peoples living in the community.

Caregiver – People who have caring responsibilities for a partner will prioritise the needs of their partner over their own needs, and of the residents interviewed in both studies it was often caregivers who could become more isolated from their communities and people around them. Factors that oil the cogs for caregivers include good community support, a well-designed and inclusive community environment and helpful staff (particularly support staff). Factors that can put a spanner in the cogs include feeling isolated from the community, struggling with the demands of caregiving and not having time for oneself.

Gender – Retirement communities are spaces dominated by women, and when men move into communities this is often as part of a partnership. For men, things that they report oil the cogs include social and community activities targeted at men, socialising as a partnership and getting involved in social and community activities. However, factors that can put a spanner in the cogs include feeling as though social and community activities are more gendered towards women, and living alone.

Socioeconomic status – Moving to, and living in, a retirement community looks different based on whether a person has the means to buy their own home, or whether they need to move to charitable housing. Having more financial resources can oil the cogs as it increases the amount of choice a resident has, increases the number of places they can afford to move to, and increases the kinds of activities they can afford to take part in. Factors that oil the cogs when residents have fewer financial resources include community support, and helpful staff who help residents access additional support when needed. Factors that put spanners in the cogs when residents have fewer financial resources include having little to no choice in where they move to, and issues with affordability of things like transport, technology and food. The whole experience of moving to, and adjusting to life in a retirement community, looks different when people buy and own their home, whether they rent a home or whether they live in charitable housing. Factors that oil the cogs when people move into rented accommodation include community support, and staff. Factors that can put a spanner in the cogs for renters include feeling insecure due to concerns that their housing could be taken away from them.

Health – When people have pre-existing health issues this can shape their ability to engage with others and activities in the retirement community setting and also mean they will have different needs to be met by the retirement community. When people have health difficulties, factors that oil the cogs include community support, a well-designed and inclusive environment and the support and care of staff. However, factors that can put a spanner in the cogs are non-inclusive attitudes from others (e.g., being 'othered' because of a disability or health condition), non-inclusive environments, and possible issues with participating in some social and community activities.

Marital status – The experience of moving to a retirement community and the impact of things that happen in the retirement community looks very different depending on whether someone moves into the community single, widowed, or with a partner. When people have a partner, this can help oil the cogs as they have support in coping with their adjustment, but there can also be a spanner in the cogs when there is a difference in adjustment (i.e., one partner adjusts well and the other doesn't). When single or widowed, factors that oil the cogs include an increased motivation to meet other people within their community. However, factors that can put a spanner in the cogs include a lack of support from a close other in the community, and if widowed missing their loved one.

Personality and attitude to change – Every person is different, and a big part of how they navigate change is their own personalities and the attitudes they have towards change. Personality also modifies how people want to experience village life, some people self-describe as 'loners' and are happy with their own company, whereas others are 'joiners' who want to join in with lots of activities. Some of the traits that people spoke about as helping them oil the cogs included openness to new experiences, and a good sense of humour. Some of the traits and attitudes that could put a spanner in the cogs included shyness and struggling to let go of the past.





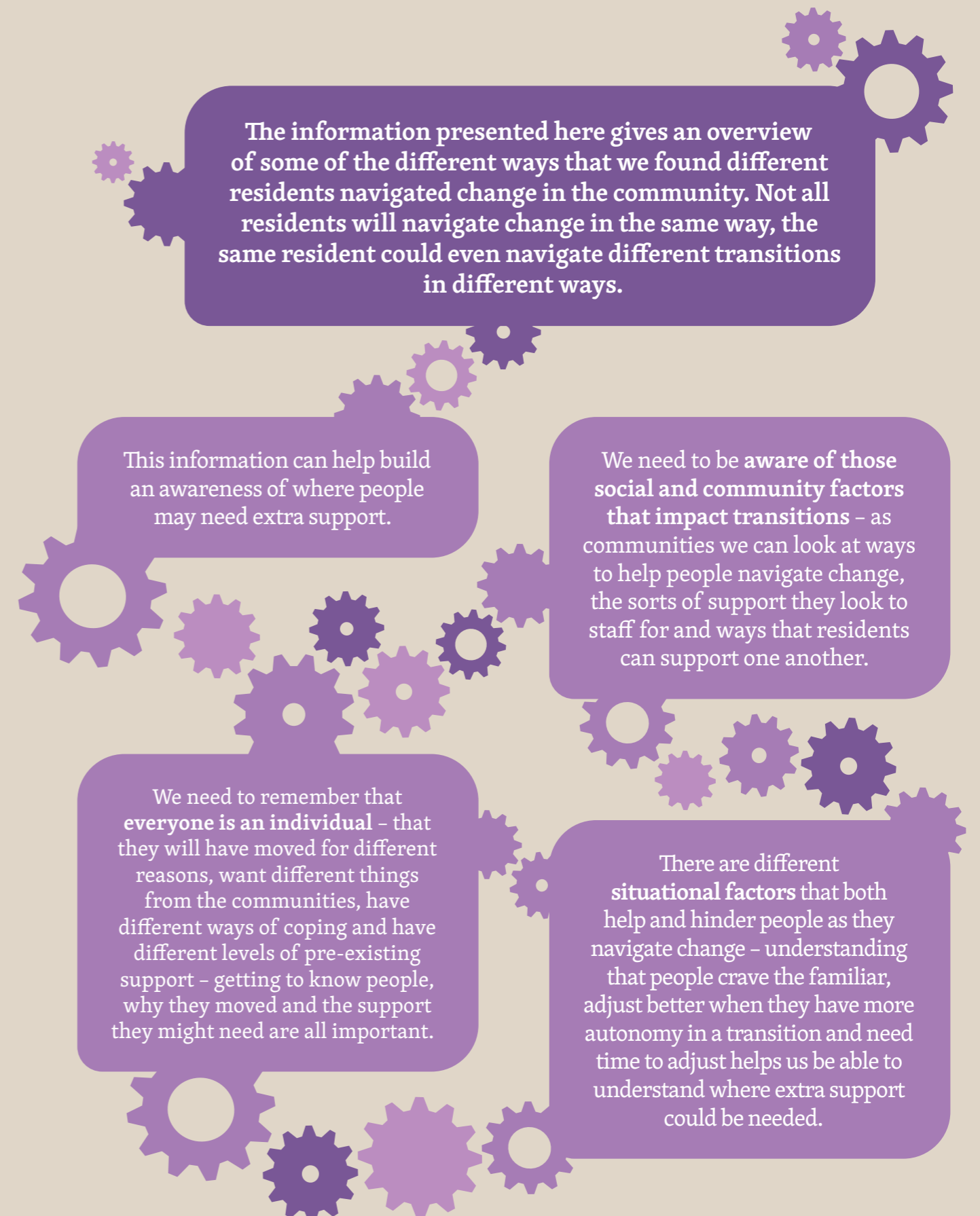
THE ROLE OF SITUATIONAL FACTORS IN NAVIGATING CHANGE

Autonomy – The amount of autonomy someone has in choosing to move, where they move to and the events that happen to them in their community shapes how easily they can adapt to these changes. Generally, the more autonomy a person has, the more this oils the cogs. When people lack autonomy or choice in what happens to them this can put a spanner in the cogs.

Familiarity – People are drawn to communities that are somehow familiar to them, and are drawn to other people in the community who are like them. Aspects of familiarity that oil the cogs include feeling that people in the community are like them, being able to meet people from a similar culture or background and moving to an area they are familiar with. There can be a spanner in the cogs when the retirement community and the people living in the community are very different to what the resident is used to.

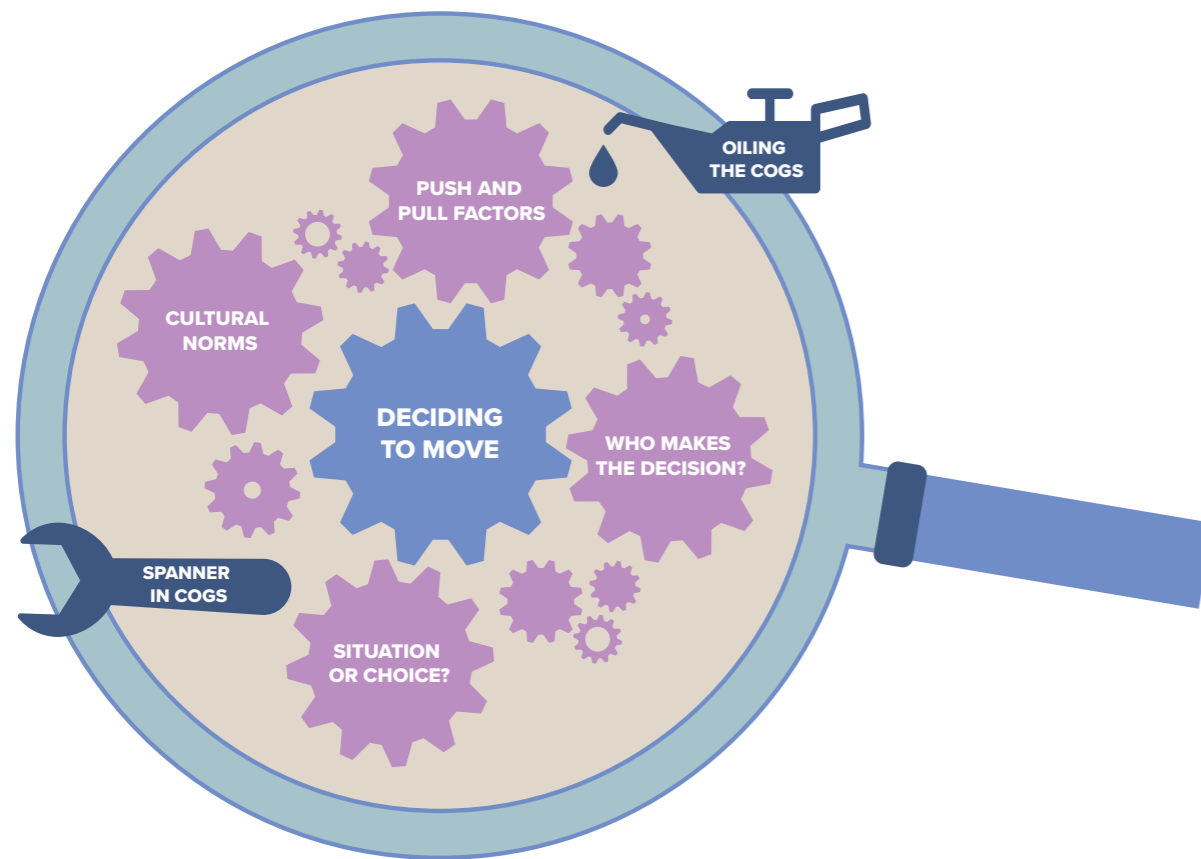
Time – One of the main ways that residents say they navigate change is giving themselves time. Aspects of time that help to oil the cogs for residents include having time to plan and undertake their move, and giving themselves time to adjust to life in the community and any changes that may impact them in the community. Aspects of time that can put a spanner in the cogs include feeling that one doesn't have the time to properly plan and prepare for their move, feeling rushed into moving and feeling that they don't have the luxury of time in adjusting to change.

HOW CAN YOU USE THIS INFORMATION?



Transition 1 – Making the decision

The first step in the transition process is making the initial decision to move. Residents speak about a variety of factors that can influence why they make the decision at that time in their life which are summarised below: push and pull factors, who makes the decision, situation or choice and cultural norms of retirement communities.



PUSH AND PULL FACTORS

Each person has different reasons for moving from their previous home (push factors), and deciding to live in a retirement community (pull factors). Common push factors include difficulties with home maintenance, bereavement, financial difficulties (particularly if moving into charitable housing) and health issues of self or partner. Common pull factors include being in an inclusive environment where they can have more independence, having access to care and the pull of community living. When speaking to providers they noted that when there is an imbalance of push factors, relative to pull factors, this can sometimes make the transition to retirement community living more difficult.

WHO MAKES THE DECISION?

Those older adults who made the decision to move themselves, or made the decision in collaboration with a trusted other generally found the transition to retirement community living smoother than those who felt they had no say in the decision. When a decision was taken by family members, or doctors that the older adult needed to move (particularly when the older adult has health issues and additional support needs) they could really struggle with the move to the community.

SITUATION OR CHOICE?

Those older adults who transitioned more easily to retirement community living are those who wanted to move, made the decision themselves and who could decide where they wanted to move to. When people feel that a decision is forced upon them by their life circumstances, or that they have no choice in where they move to this can make transitioning to community life more difficult.

CULTURAL NORMS OF RETIREMENT COMMUNITIES

There is a difference in the awareness of retirement communities in the UK versus other countries such as the USA or New Zealand. In other countries where there is a norm of moving to a retirement community people sometimes talk about a general awareness that they will end up in a retirement community one day. Whereas in the UK where there is less awareness of the sector people often 'stumbled across' information about these kinds of communities, or were encouraged to consider moving to this kind of accommodation by other housing services.



WHAT PUTS A SPANNER IN THE COGS

Lack of **autonomy** when the decision is made by others or by life circumstances.

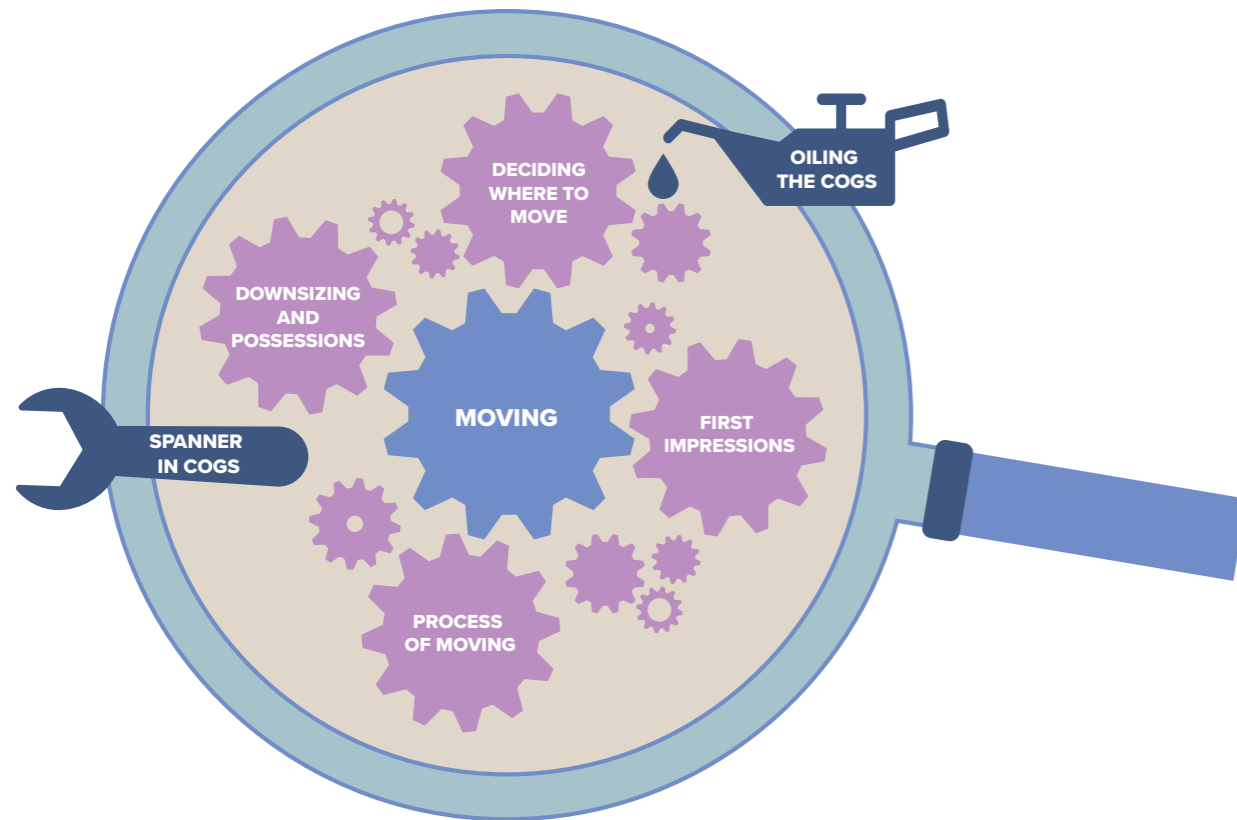


WHAT OILS THE COGS?

Support from friends and family who help the resident to make the decision, providing temporary accommodation if needed.

Transition 2 – Moving

The next step in the transition is the process of **moving** to the retirement community. Residents identified a number of factors which influenced this process, which are represented below: **deciding where to move, first impressions, process of moving, and downsizing and possessions.**



DECIDING WHERE TO MOVE

When deciding where to move the person taking the decision speaks about a number of factors that are important in helping the resident (or other) come to the decision. These include factors such as an area the resident is familiar with, being near friends and family, and the physical and social environment of the retirement community. For those residents who are renting and/or moving into charitable housing they sometimes report having less choice in where they move to.

FIRST IMPRESSIONS

The first impressions a resident experiences on visiting a community for the first time are an important part of the moving process. If first impressions are not favourable (e.g., being in an environment full of older people when they don't self-identify as old, being overwhelmed with the community, feeling like existing residents are not welcoming) this can lead to hesitancy about wanting to move to that community. Whereas, when first impressions are good (e.g., friendly residents in community, interesting facilities in community, lots of green space and a sense that they have found 'home'), these all help the resident want to move to that community.

PROCESS OF MOVING

Different communities have different processes for moving. Some key differences are whether the community has an interview process, and whether the resident is buying a home, renting a home or moving into charitable housing (different entry criteria and different amounts of choice). Whether the community is new or existing, and whether there is availability for the resident straightaway or whether they have to wait to move in.

DOWNSIZING AND POSSESSIONS

One of the most difficult parts of the move for many residents was having to let go of treasured and valued possessions, and downsizing in preparation for living in a smaller space. For some residents feeling that they were giving away their possessions to a good home where others will value and treasure those possessions (by giving to family or charity) can be helpful.



WHAT PUTS A SPANNER IN THE COGS

Life history, particularly when moving at a time of personal upheaval. When residents are trying to navigate lots of major life transitions at the same time it can be hard to process all of these at the same time as making a major life move.

Lower **socioeconomic status** can mean that residents have less options available to them in terms of where they can move to. When moving to communities designed for people of limited means, residents can feel that there are 'criteria' that they will need to meet, which can be a source of stress at a community interview and mean residents don't disclose issues that they think could hinder their ability to get a place at their community.



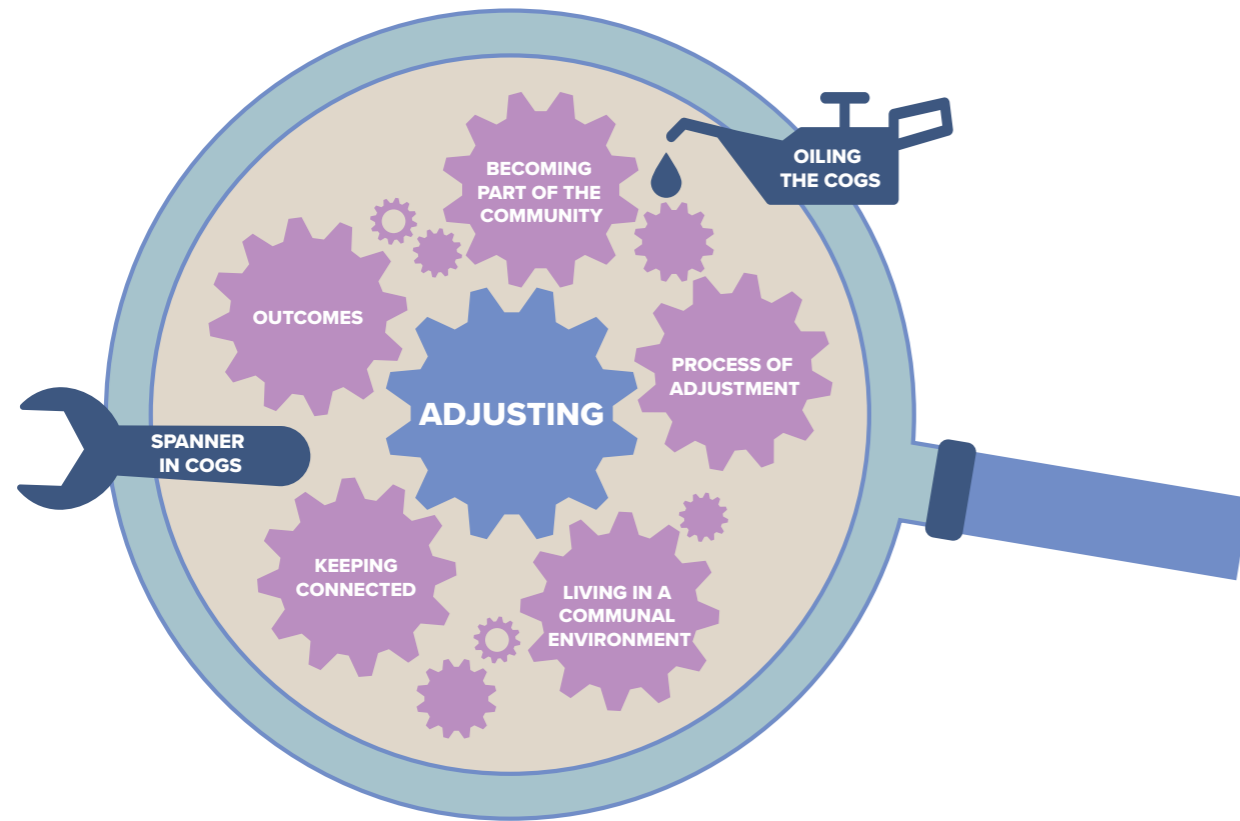
WHAT OILS THE COGS?

Helpful **staff** in community who help the resident by communicating the process of moving and help signpost the resident to sources of support (e.g., if financial difficulties helping them apply for support payments).

Familiarity with the area, or with the community itself can help residents make a decision about where to move.

Transition 3 – Adjusting

The next step of the transitions process is adjusting to life in the retirement community. Residents identified several factors which influenced this process, which are represented below: becoming part of the community, process of adjustment, living in a communal environment, keeping connected and outcomes.



BECOMING PART OF THE COMMUNITY

A key part of transitioning to life in the community involves ways in which residents get to know others, and become a part of the community. The extent to which people engage with others in the community depends on their personal motivation (e.g., whether they self-identify as someone who enjoys the company of others, or prefers their own company), the extent to which they are looking for deep and meaningful friendships in the community, and whether they feel they need friendships (e.g., they have a partner or an active outside community life).

PROCESS OF ADJUSTMENT

Adjustment as a process can be thought of as a process of negotiation, where residents are balancing up the gains they get from living in the community (e.g., an adapted environment, activities and facilities) with the losses they experience due to leaving their previous home (e.g., a loved family home or location, leaving friends and family). For some residents they feel at home very quickly, but for others the process of adjustment is something that takes time and can be something that residents struggle with. Other aspects of the process of adjustment include the process of making one's personal space one's home by using their own furnishings, having space for hobbies and making the garden their own.

LIVING IN A COMMUNAL ENVIRONMENT

One of the main difference's residents speak about is the transition from living in their previous private home to living in a community of people. Communal living has many positives such as a sense of being in something together and feeling that one is part of a community. However, people can have difficulties with some aspects of communal living such as a perceived lack of privacy, a perceived lack of individuality if they feel they cannot make a home their own and adjusting to different rules and regulations that are often implemented in retirement community settings.

KEEPING CONNECTED

Being able to connect and stay in contact with others outside the community are something the resident needs to adjust to, but contact with others is also a way of being supported through the transition. Having access to technologies such as phones and internet, as well as reliable transportation (personal car or good public transportation) all help residents stay connected with friends and family outside the community. Sometimes when people find it hard to adjust to life in the community they will report spending a lot of time with others outside of the community setting.

OUTCOMES

There is no clear end-point to adjusting to life in a community, but there was a general acknowledgement of the importance of giving yourself time and a range of outcomes experienced by residents. Residents framed a good adjustment as feeling as though they were in an environment that offered safety, security and care and living in a place that offered them companionship. Many residents spoke of a sense of relief, relaxation and contentment that came from knowing they were in a safe and secure environment. This feeling was particularly strong in those who had experienced a lot of personal upheaval prior to, or during their move. Those residents who were well-adjusted often expressed feelings of gratitude towards the staff and broader community. They would also refer to the community as "home". Where residents did not experience these kinds of outcomes there continued to be ongoing struggles with their transition to living in a retirement community. Struggles that people experienced included feelings of grief, loss and separation from their previous life outside the community.



WHAT PUTS A SPANNER IN THE COGS?

When people have **health** difficulties this can lead to difficulties in transitioning to the retirement community. This can be due to the attitudes of existing residents, particularly towards those with cognitive and physical impairments (i.e., ‘othering’ of people who are perceived to be less independent) and mean those with health difficulties can be left out of social and community activities. This can also impact people who are caregivers of people with a health difficulty who can also find it difficult to transition to a retirement community.

A lack of **community support** can mean that residents find it difficult to feel at home. For example, many residents who move to an existing community report it is hard to infiltrate cliques, report issues with gossiping that make them feel uncomfortable and some report feeling as though they are not welcomed into the community. At the most extreme this can lead to issues with bullying of new residents, which can lead new residents to struggle with adjusting to life in the community.

When residents **move into an existing community (rather than as part of a cohort)** they can find it more difficult to adjust, as they have to navigate existing social groups and find their own place in this existing community.

Housing tenure can also impact adjustment, with some people who rent or move into charitable housing reporting that they feel less secure in their housing than people who buy their own house.



WHAT OILS THE COGS?

Having **community support** from both existing residents and staff all helps people to feel that they are transitioning well to community life. Things new residents mention that are particularly helpful include welcome events, friendly existing residents who help them feel welcomed, trying out different activities, taking on voluntary roles within the community, practical support and signposting from others. Furthermore, the community environment, particularly communal spaces and finding community ‘hubs’ can be a useful way to meet others.

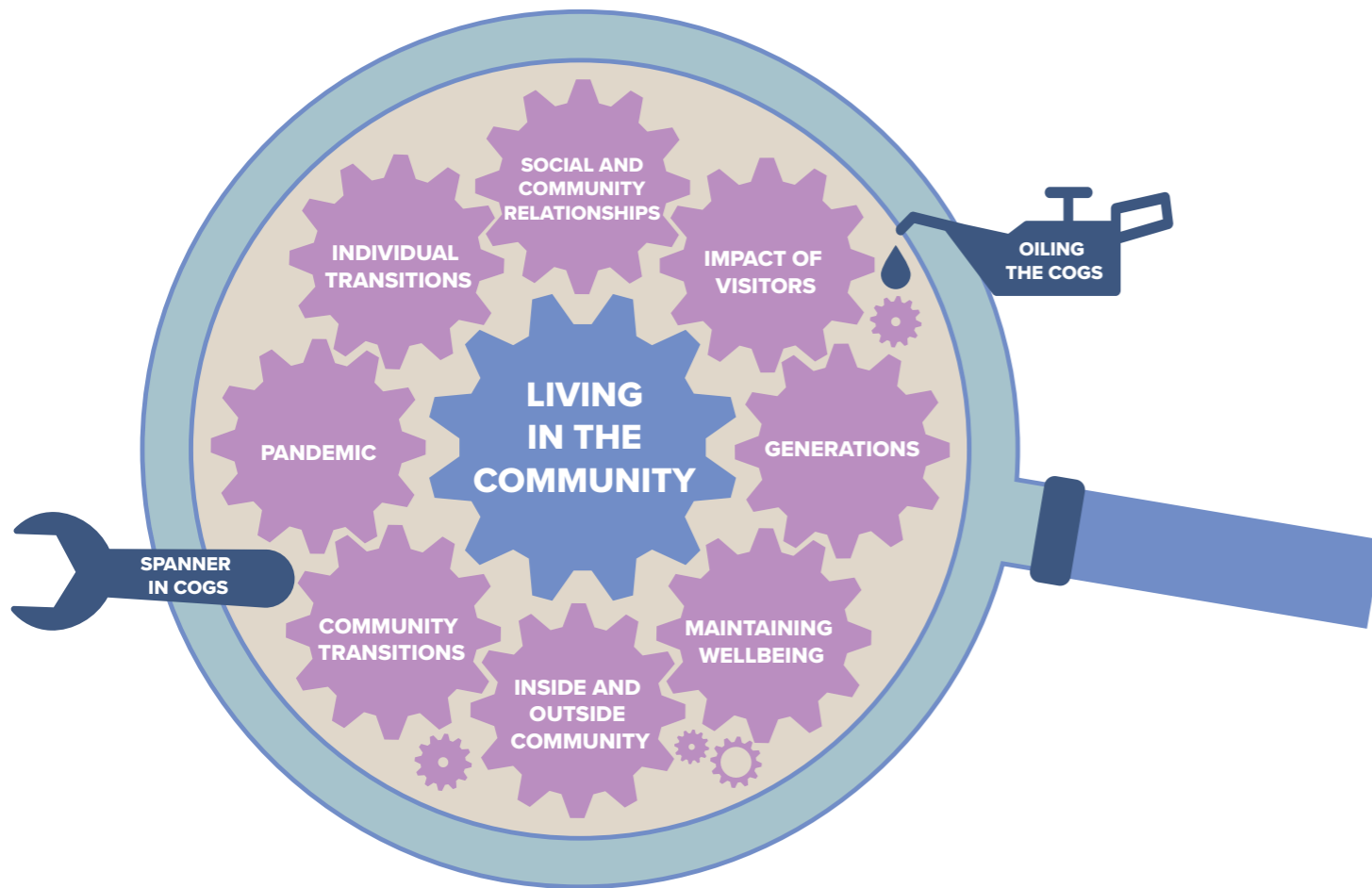
Finding common ground with others (**familiarity**) is a key strategy that helps residents adjust to life in the community. This can be as simple as finding a common interest (e.g., gardening), or being from a similar part of the world.



Transition 4 – Living in the community

Once the resident has moved in and feels more like the community is home, they navigate living in the community which includes aspects of day-to-day life and further life transitions. Retirement communities are dynamic and changing spaces, where residents are constantly navigating day-to-day life, but also major life transitions that can impact both the broader community and individuals. Many of these changes require adjustments similar to those outlined in the ‘adjusting to life in the community’ cog.

Residents identified a number of factors related to living in the community, which are represented below: social and community relationships, impact of visitors, generations, maintaining wellbeing, inside and outside community, pandemic, community transitions, and individual transitions.



SOCIAL AND COMMUNITY RELATIONSHIPS

While living in the community the resident navigates relationships with others. Most residents have different levels of relationships with people in the community, from strangers through to acquaintances, friends through to family. Positives of social and community relationships include companionship, neighbourliness, togetherness, having the opportunity to advocate for one another (e.g., community forums), feeling as though one has a place and role in the community (e.g., volunteering), and offering social support to one another. Negatives of social and community relationships include being lonely and isolated, rudeness, bullying and gossiping.

IMPACT OF VISITORS

When living in a community there are ongoing issues and tensions which can impact people living in the community – of the residents we spoke with we found one common recurring issue across communities was the impact of visitors (with the term ‘outsiders’ sometimes being used by residents). For some residents having people visit their community to enjoy facilities was a positive, particularly when residents felt visitors were contributing somehow to the community (e.g., providing companionship to residents, seeing families enjoying the space). Whereas some residents responded negatively to others using their space, particularly when residents felt visitors somehow took advantage of their community (e.g., people leaving behind rubbish).

GENERATIONS

While traditionally thought of as spaces for older adults, many of the residents we spoke to would emphasise the differences between different generations of older people and emphasised that retirement communities are multi-generational spaces. Terms such as ‘elderly’ would be used when talking about people who were perceived to be older or frailer. People would also differentiate between younger-old people who were more active, from ‘elderly’ people who were spoken about as needing extra support and care. There were also a number of younger people working within the community, and frequent visits from younger family members, both of which were generally spoken about as positive.

MAINTAINING WELLBEING

Residents had important and personal ways that they maintained their wellbeing in the community. For many these included exercise, personal hobbies, spending time in nature, gardening, having pets, having a routine or spending time with important others (could be from within or outside of the community). For many residents having a balance of life inside and outside the community is also important to maintaining their wellbeing. To be able to engage with others who live outside the community having access to transportation and technologies is important, as is having people come and visit one in the community.

PANDEMIC

All residents we spoke with during our interview study mentioned the pandemic and the impact that had on their lives in the community. This had a notable impact on community life, but also each individual living within the community. Pandemic-related issues included difficulties with not being able to see friends and family from outside the community, staff being less visible, increased rules and regulations with a perceived loss of freedom and autonomy, and a loss of things they treasured doing in the community (particularly activities and events). However, many residents expressed gratitude towards their community as a place where they felt safe, secure and cared for during the pandemic. Those with direct access to greenspace were particularly grateful for living in beautiful natural environments during the pandemic. The pandemic also built up a sense of togetherness within some communities, and when residents felt as though they were in something together it helped them support one another.

INDIVIDUAL TRANSITIONS

While living in the community the resident can experience a range of major life changes that impact them as an individual such as bereavements, health changes, role changes in the community, becoming a caregiver for a partner, and needing to move to different accommodation with additional support (e.g., residential care). Residents also speak about anticipated and ongoing changes. These transitions can be thought of as gradual changes that impact a resident. Anticipated and ongoing changes are the awareness of issues that could impact them as they gradually get older, and what that means to the resident. Many residents speak about issues relating to their own health and an awareness of an increasing number of bereavements within the community and what that means in terms of their own mortality.

COMMUNITY TRANSITIONS

Community transitions can be thought of as community-level changes that affect residents living within the community. One example residents spoke about was changes to staff and management, and the subsequent impact this had on community mood. When residents lost staff with whom they had a good relationship, losing these people could be difficult for the resident. Furthermore, when residents felt as though structural changes were forced upon them without consultation and there was a lack of clear communication from staff about changes this could lead to resentment and a narrative of 'us and them'. The lack of communication paired with community gossip between residents could fuel resentments towards staff and structural changes. Another community transition identified through knowledge-exchange workshops and research literature was: changing residents. The population of a retirement community is constantly changing as old residents pass away, or move to alternative accommodation and new residents move into the community.



WHAT PUTS A SPANNER IN THE COGS?

Lack of **community support** from others can lead residents to become isolated from the community and also have a direct impact on their wellbeing. Lack of support can be seen in terms of attitudes to people perceived to be different (e.g., health), cliques, and issues with bullying and gossiping.

Where there is a lack of **autonomy** and the resident experienced something that was completely outside of their control this will be harder to navigate than something the resident has choice in.

Feeling **staff** and the broader community are not supportive, and not having any **social support** outside of the community can mean that residents struggle to adjust to changes in the community. Residents also struggled with a lack of clear communication from staff when navigating ongoing and major changes within their community.

Engaging with the **community environment** is mentioned as important when living in the community. The built environment provides facilities that provide practical support, but can be spaces that facilitate emotional support and are important spaces for the development and maintenance of relationships. Furthermore, greenspace is mentioned as being important for maintaining health and wellbeing, but also being a space that residents go to to help them cope with major life transitions.



WHAT OILS THE COGS?

Being in an environment that offers **safety, security, care** and support helps residents to navigate both day-to-day changes but also major life events within the community. For instance, if experiencing health issues, being in an inclusive environment where one can easily access care and support helps residents to navigate this change. Where residents felt that they are in a safe, secure and caring environment this can help

Having **community support** from others is important for both improving the wellbeing of individual residents, but also promoting a positive mood in the community. Where residents show kindness and compassion towards others in community, this can help them feel better about themselves but also help others feel more supported.

Feeling that there is a good relationship between **staff** and residents. When residents feel that staff listen to, and address, their concerns this helps residents in their day-to-day life in the community. It is also important to have good lines of communication between staff and residents (residents particularly like it when staff are visible and walk around the community so they can have a chat if needed).

Personality and attitude to change modifies how residents adapt to events and change in the community. Key characteristics that help people adapt to change include resilience, empathy, and wisdom. Awareness and acceptance of changes that happen as one gets older also help residents prepare for the changes that can accompany older age.

Resident stories

To protect the confidentiality of the people that took part in our study we have created composite narratives based around their stories. They are designed to illustrate some challenges and experiences faced by residents – and how the framework can help us understand their experiences.

We present three composite narratives: The first is a couple (Sally and David), the second is a single woman (Sandra) and the third a single man (Arthur).

See if you can identify the transitions in each narrative and how they were navigated. Also think about what put a spanner in the cogs and what oiled the cogs.

You can see how the report authors answered these questions at:

www.kinder-communities.com/transitions-project-1

NARRATIVE 1 - SALLY AND DAVID

Sally and David met in their twenties and had one child. Sally was a stay-at-home mother and David had a low-paid manual job. Money had always been tight for the pair and they had lived in council housing for their whole lives.

David's health rapidly declined in his early sixties and he had to give up work. David found it increasingly hard to get around their home, particularly the steep stairs. The pair also found that maintaining their home was becoming increasingly difficult. After their child moved to another country they worried about how they would cope in their home.

David and Sally were not sure what housing options would be available to them given their financial difficulties and David's health needs. But, one day by chance they saw a programme on TV about a charitable retirement community in the South of England. They spoke about how beautiful the community was and decided that they would like to visit.

On visiting the community David instantly felt at home, and Sally was delighted to see how happy David was. They both liked how existing residents waved and said hello as they walked round, and they liked the nature and green space in the community.

On seeing one of the bungalows which would be a lot easier for David to get around they made the decision to apply to move to the community. After applying they had to undergo an interview, they didn't mention his difficult diagnosis during their initial application process in case it counted against them.

In order to fit into their new home, Sally gave up her sewing machine and David donated the contents of his tool shed to their son. Parting with items they had collected on their lifetime travels was also tough and both reflected on this as a painful time ahead of the move.

On the day they arrived they were particularly grateful for a note from a neighbour stuck to their front door, offering tea and cake when they felt ready; particularly as they'd heard another neighbour shouting at a passing cyclist as they pulled up, unsure where they should park. Three years on, they both remembered this as an emotionally tense day.

In the ensuing weeks, Sally urged herself to get involved in some of the clubs. David sometimes joined her but – being more of a 'loner' – was generally content to get out and about on his own again, between their accessible flat and the village shop where he'd have a chat and buy a newspaper.

However, Sally noted how she struggled to feel like an individual in a homogenous village of older people with near-identical homes. This eased over time as she added her own touches to their home.

Sally took up sewing again with a village club set up by 'outsiders' who brought a fresh perspective. It was also here that she met a villager who became a close friend.

When David died two years after they had moved in, she felt the true value of her community, with friends and neighbours offering their support and a pile of sympathy cards dropping through the door. She slowly got back to her sewing and started to walk most days with her close friend.

Her friendship groups have changed over the last year to include more widows. With a host of activities on offer and the sense of feeling deeply understood by people at a similar life-stage, she feels content and reflects on the loneliness of a friend who lives alone in a nearby town. Whilst she loves to get away occasionally, she has a distinct sense of 'coming home' as she drives back in through the village gates.

CAN YOU IDENTIFY THE TRANSITIONS THAT SALLY AND DAVID WENT THROUGH AND HOW THEY NAVIGATED THESE CHANGES?

WHAT PUT A SPANNER IN THE COGS?

WHAT OILED THE COGS?

NARRATIVE 2 - SANDRA

Sandra realised that retiring from her job, which also provided her with a nearby home, would mean that she was unable to afford a rental property with her state pension. She worked for longer than planned because of it and picked up other odd-jobs to top up her small savings pot.

Her life had been an exciting and largely independent one, full of twists and turns, and her philosophy was very much about living in the moment and facing the tough times head on. Her second husband had died young and she determinedly lived a full and active life since his death.

For once, however, her linked work and accommodation situation, meant that she felt quite stuck - until a friend mentioned a nearby retirement village which partly operated as a charity. On being accepted and subsequently moving into the village, her overriding feeling was one of utter relief. She realised she had spent much of her life striving to make ends meet, and this had caused constant anxiety. A means-tested home of her own meant that she could finally let go of that stress.

Embracing her new home with enthusiasm, she quickly engaged with the social clubs and, for physical stress-relief, worked hard at creating her village allotment. Whilst genuinely happy with her new set-up, she soon started to notice some of the less pleasant aspects of community living - particularly gossip about other villagers and, at times, staff. This took her by surprise and made her wonder what people might be saying behind her back.

Sandra reflected on why other residents may act in that way. She understood that some of the other residents could be fearful or unhappy, and this played out in their relationships with others. She soon found a way to cope with this, brushing off the smaller indiscretions and perhaps gently pointing out the more hurtful ones. Always listening with kindness and never fuelling the fire.

Despite the challenges of (imperfect) relationships and the occasional yearning for the kind of privacy that's hard to find in an 'open plan' community, Sandra feels immense gratitude for her long-awaited peace of mind, the fun-filled friendships, and the natural joys of the village's green spaces.

NARRATIVE 3 - ARTHUR

Arthur worked as a director for a successful company for most of his working life and after retiring lost his wife to cancer. His children felt that the house he lived in was too big, and wanted him nearer - so encouraged Arthur to look at moving to a retirement community nearer them.

Arthur looked at a few different retirement communities with his children, before going to one that had not yet been built. Arthur liked the area, and was even allowed to make some changes to the plan of his flat so decided that was the community for him. He put down a deposit and sold his large house which he found stressful. He mentions that having to give away possessions that he and his wife bought together to be particularly difficult. For him the most difficult part of his move was having to give away a beautiful dining set that was a wedding present because his children felt it was too 'old-fashioned' for them. Arthur then lived with his children for a few months while he waited for his flat to be completed.

Arthur moved in as part of the first cohort of residents, with 100 residents all moving in at the same time. The community put on a series of events for the residents, and while enjoyable Arthur noticed most of the men that he met were part of a couple, and that there were very few single men in the community. He suggested to the management that it could be nice to have some gentleman's nights, and the management asked Arthur if he might like to help them also set up a residents committee.

Arthur found chairing the committee was enjoyable to him as it reminded him of when he had managed his company and meant that he felt he had a purpose in the community. Over time Arthur helped to set up new groups and activities, but after 3 years in charge was asked to step down as the new management in the community felt that they should change the committee every few years so that it didn't become cliquey. While Arthur agreed this made sense, he was upset to have not been consulted on this and felt that he was no longer sure what role he could play in the community. He spoke to a member of staff about his concerns, who signposted Arthur to other volunteering roles he could undertake, and he ended up being editor-in-chief of the community newsletter.

CAN YOU IDENTIFY THE TRANSITIONS THAT SANDRA WENT THROUGH AND HOW SHE NAVIGATED THESE CHANGES?

CAN YOU IDENTIFY THE TRANSITIONS THAT ARTHUR WENT THROUGH AND HOW SHE NAVIGATED THESE CHANGES?

WHAT PUT A SPANNER IN THE COGS?

WHAT OILED THE COGS?

WHAT PUT A SPANNER IN THE COGS?

WHAT OILED THE COGS?



Knowledge-exchange event – speaking to retirement community providers

On 30th June 2021 the project team and funders held a knowledge-exchange event with the support of Gareth Lyon from ARCO. The event was facilitated by Dr Brian Beach, and Dr Paul Willis from the advisory group also attended. People representing six housing providers attended the event and were asked about their thoughts on the draft report, explanatory framework and about initial ideas for how we could support residents making the move to a retirement community.

Feedback about the report and framework was generally positive – though there were some factors that providers mentioned that were not included in the framework (and factors we had observed within our research) such as housing tenure, moving in as a cohort and the importance of different situational factors. We therefore emphasised all these factors in the navigating change theme. Change to “Originally we had a single transition called “moving”, but after speaking to providers it was clear that the ‘decision to move’ was a clear and separate transition of its own. The differentiation of ‘moving’ from ‘decision to move’ was something that we had also observed within our literature review. Therefore, we separated out the ‘decision’ transition from the ‘moving’ transition.

Things providers felt could be missing Providers also highlighted the lack of regional variation within the interview study, and suggested that future work should look at experiences across the UK. They also stated that the report would be too long and dense for most audiences, and that having shorter versions for different audiences could increase the reach of the work.

We also asked providers about existing support offered to residents when they moved in, and all providers generally provided good levels of support from staff, making use of existing residents to support new residents and providing information packs. When we asked what additional tools and resources they felt could be useful providers were generally positive about the ideas of tools such as videos and checklists that they could signpost residents to at different stages of their move. They also emphasised that tools needed to be adaptable for different communities (which all had different existing ways of supporting residents).



Advice to residents making the move

ADVICE FROM EXISTING RESIDENTS TO NEW RESIDENTS

When we interviewed residents, we asked them if they had any suggestions that could help other people when they move to a retirement community. Below are some of the suggestions they had for incoming residents and management:

MOVING

- Give yourself time - having time to plan a move, having time to adjust to life in the community, and giving yourself time to adjust to any changes in the community can all help.
- Read the small print - there are sometimes additional fees and costs beyond those promoted by the company for owners, and for renters you could get help with some costs so ask about where to can get financial support.
- Focus on the positives - this is an opportunity for a new start - one resident we spoke to suggested that we should use the term 'right-sizing' rather than rather than down-sizing for the process of moving to a smaller home.
- Think about the things that may happen as you get older, and be prepared for changes that might come along - being in this kind of community is a way to prepare for these changes.
- As the sector expands make sure that people from all financial backgrounds will be catered for - not just people who have lots of money.

ADJUSTING TO LIFE IN THE COMMUNITY

- It would be nice to have a point of contact when you first move to a village - if you get given a pile of papers about what to do you just ignore them (and it is overwhelming), so a system where you have someone who can help you through those first few weeks would be helpful.
- If you can, treat yourself to something new for your new home - it will help to have new things for your new start as well as treasured old things.
- Find activities and clubs that you will enjoy - see the move as an opportunity to challenge yourself to try something different - you might find that you enjoy it!
- Volunteering in the community can help give you a sense of structure, routine and be a nice way to meet others in the community.

ADVICE FROM THE PROJECT RESEARCH ASSISTANT TO NEW RESIDENTS

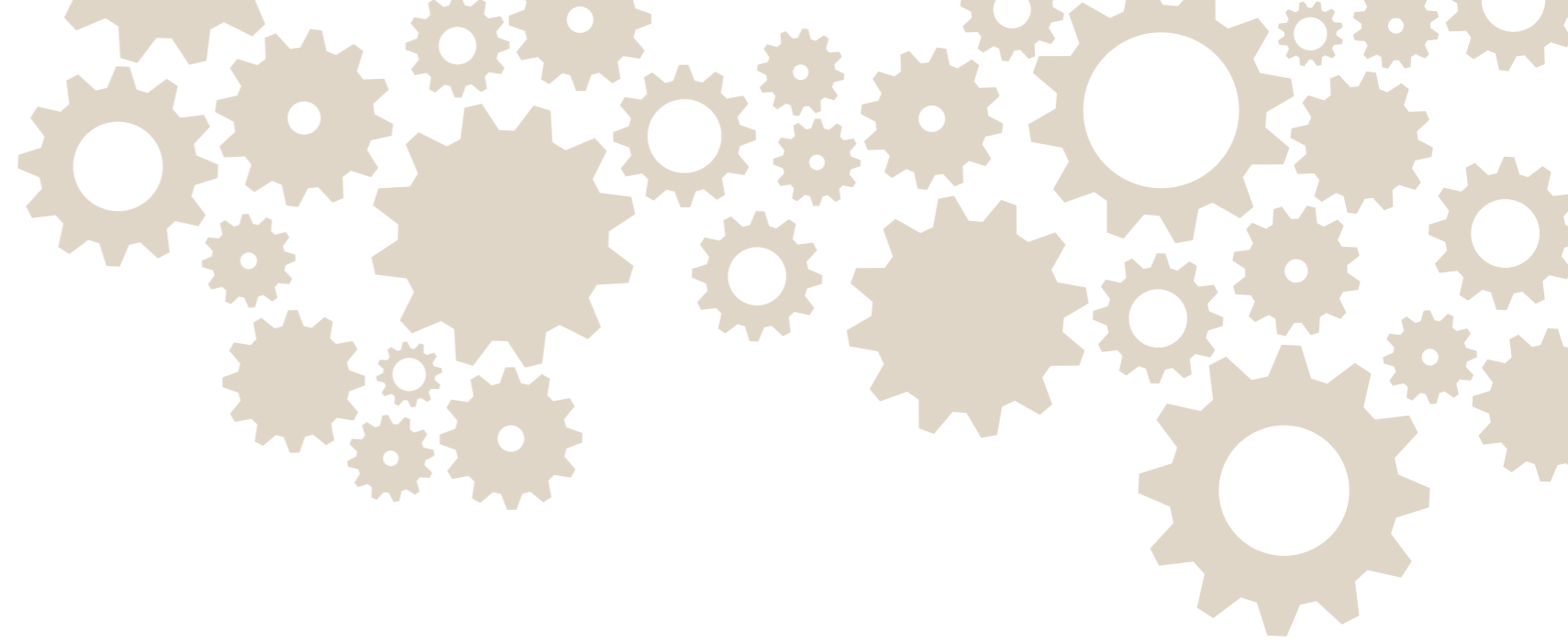
The project research assistant Julie Round also works as a personal development coach. Based on her observations from the project, she offers some insights for residents on helpful things to try out during times of significant personal change.

- Consider the things you enjoy or strategies that have supported you in some way in the past e.g. engaging with nature, feeding the birds, walking, swimming, other forms of exercise, talking to a friend or family member, journaling, therapy, art, music, poetry, literature, gardening, tea (and cake) with a neighbour. Experiment and see what works. Have fun with it.
- Try something new. Explore clubs, societies and volunteering opportunities. Finding what suits you can bring a sense of fulfilment, connection to others and a helpful routine. The long-lived Japanese refer to this as their 'ikigai' - or their reason to get out of bed!
- Engage at your own pace and notice the people and activities which nourish you and those which deplete you. Design your new lifestyle and routines to suit you.
- Connect with others. Listen, share, laugh, find common ground, and relate to others with empathy and compassion. Be curious. Forgive them if they're having a tough day. Lift others up by showing them a small kindness - it's shown to be good for both the giver and receiver.
- Curate your space. Photographs, cards, pictures, plants, scents, colours, quotes and other meaningful items can bring real joy. Make your new home work for you. What makes you smile or relax in each room? And the same for your garden, balcony or window sill; what do you want to see, feel, smell and hear? Birds and butterflies, flowers and herbs, vibrant or calming colours, grasses shifting in the breeze?
- Managing your mindset is a really powerful habit e.g. feeling and expressing gratitude, noticing the little things, finding solutions to problems, and keeping your energy forward focussed i.e. not dwelling too much on the past but looking at what you can do today. Also recognising that change can be a tricky process, being kind to yourself, and remembering that challenging times are a common human experience and you're not alone.
- Reach out if you need support (Age UK, GP, other support services in and outside of your community).





KINDER COMMUNITIES



Next steps

In the next phase of this project we will be working with the Pargiter Trust, ARCO, University of Bristol and the Whiteley Foundation for Ageing Well to develop ways that we can use this framework to support people moving to retirement communities and 'create kinder communities'.

This next phase will be funded by the ESRC Impact Acceleration Account at the University of Surrey and Pargiter Trust.

This project will start in November 2021 and we are looking for retirement communities where staff and residents would be interested to help us develop ways to support people moving to, and living in retirement communities.

JOIN US

Learn more about our ongoing and planned research here:

www.kinder-communities.com

To feedback on the report or to join us for the second part of this project in 2021-2022 email Kimberley Smith:

Kimberley.j.smith@surrey.ac.uk

