

**A CCRC FOR NEW CANAAN:
OUR TOWN'S HISTORY OF SUPPORT**

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Introduction:

For more than thirty years, the New Canaan community has formally recognized the need and desire to be self-sufficient in providing health services to its older adult population. From the 1975 inception of Waveny Care Center, which “arose from the needs and hopes of the New Canaan community to improve the quality of life of fellow citizens affected by illness, injury or advancing age,”¹ to the very premise underlying the recent creation of the SPNC² organization, the past three decades have demonstrated a recurrent desire to promote aging-in-place within New Canaan. Time and time again, our community has emphasized and delivered upon the importance of providing New Canaan’s seniors with the necessary resources, services and programs to address their healthcare needs within their own town lines.

Our community’s commitment to maintain and continually improve upon the scope and substance of its eldercare services has been furthered by numerous studies, long-range plans and needs assessments undertaken by citizen-based task forces with the objective of identifying and meeting the ever-changing needs of its senior constituency. Despite the years, and even decades in some cases, that separate these initiatives, their conclusions and recommendations bear unmistakable consistencies. Perhaps the most prominent and timeless common thread is the notion that the New Canaan community must continually strive to identify and address any “voids”³ or “missing links”⁴ that may exist within its spectrum of senior services, programs and residential provisions to avert otherwise-necessary departures by its growing aged population. As stated in the 2000 United Way Health & Human Services Needs Assessment, “New Canaan needs to ensure that elderly residents who want to remain in the community can do so while enjoying their accustomed quality of life and as much independence as is safely possible... Whether those who want to do so are able to remain in New Canaan depends on New Canaan’s ability to provide a seamless continuum of care.”⁵

Today, this clearly discernable and historically recurrent theme is more evident than ever. It has prompted the creation and growth of an organization wholly and literally dedicated to “Staying Put,” whose success underscores the desires of our elders to remain in their community. This and other efforts to partially fill voids in the town’s continuum of available support services point us in an unmistakable direction: **The town of New Canaan must address the single-greatest long-identified need and unfulfilled recommendation put forth in every study on long-range plans for years. Specifically, in order to accommodate the increasingly large sector of aging adults and couples, the town must move forward in establishing a New Canaan-based assisted living/Life Care Community.** Only then will a seamless continuum of care be achieved, and New Canaan’s older adults be enabled to thrive within their own community without needing to seek external residential alternatives.

¹ Waveny Care Center Mission Statement, Adopted December 10, 1975; Amended December 4, 1991.

² Staying Put in New Canaan

³ Assisted Living Study Group, 1999

⁴ Growing Older In New Canaan, 1994. pgs 18, 26

⁵ New Canaan Health & Human Services Needs Assessment 2000, pg 15

Findings:

Evidence supporting New Canaan's desire to achieve a fully-integrated continuum of care is abundant, and steps toward that goal have steadily been made since the 1970's. Key efforts designed to provide eldercare resources include the creation of Waveny Care Center and the Village at Waveny Care Center, the development and transition of New Canaan Inn, the establishment of the School House Apartments, the enhancement of our town Human Services Department, the expansion of the Senior Center program at Lapham Community Center, and the continued availability of the Getabout transportation program.

Specific initiatives to provide adequate senior housing have been ongoing in both discussion and implementation for decades. The creation of New Canaan Inn in 1981 through St. Mark's Church was a first step toward achieving this goal, however it soon became evident that the Inn could not sustain the growing needs of seniors, as its "present size [was] close to being economically unfeasible,"⁶ and the residence "originally developed as a facility for active seniors, [was] now trying to meet the needs of an increasingly older, frailer clientele."⁷

The solution of developing a Lifecare Community or "Continuing Care Retirement Community" (CCRC) – a continuum of care that provides access to housing, services and nursing, usually all within the same vicinity – to meet these growing needs, has been proposed by studies and findings that date back to the late 1980s. Due to its incredible foresight, perhaps the most notable recommendation came in 1989 via Lifespan Systems, Inc., a community based, non-profit corporation formed to "develop services and facilities to address the need for long-term care in New Canaan."⁸ Through a survey of roughly 3000 respondents in the primary market area, the organization recognized the need for and feasibility of a New Canaan-based CCRC. Lifespan's determination of significant market demand led to a far-sighted proposal that recommended the creation of upwards of 250 independent living units located on Town land west of Lapham Road. Part of the appeal of this scenario was that the use of Town land would permit the facility to be priced competitively and enable services to a broader income spectrum. In accordance with a CCRC's range of service provisions, the project entailed the integration of skilled nursing at Waveny Care Center and included many of the amenities one would expect to find within a modern Lifecare community. Private individuals and the New Canaan Community Foundation provided funding for environmental sanitation and conceptual layout studies, however when presented to the Board of Selectmen its merits went unrecognized due to some opposition to the use of Waveny land at the time.

A second initiative during this time arrived at the same conclusion, but addressed geography on Oenoke Ridge. The clear need for housing specifically designed for seniors led to a joint venture between St. Mark's Church, New Canaan Inn and Cotlyn Construction Co., with Cotlyn's role involving the contribution of land it owned on Oenoke Ridge just south of St. Mark's Great Lawn for the construction of 24 condominium units to be sold to seniors age 62 and above. With plans to be named "St. Mark's Common," these townhouse units would be designed to accommodate live-in assistance, designate underground parking and be ADA compliant. Continuity of care would be provided through New Canaan Inn, which at that time had plans to position itself as a quasi-assisted

⁶ New Canaan Inn: Marketing and Operations Audit, 1997

⁷ NC Health & Human Services Needs Assessment, 2000

⁸ Market Analysis for Lifespan Systems, Inc. by Gerontological Services, Inc. August 1989.

living facility if the project succeeded. Ultimately, the project was unsuccessful due to concerns about its non-profit status and a narrow reading of the special permit approval process to allow its construction within the residential zone.

The concept of achieving a seamless continuum of programs, services and residential options for older adults was revisited throughout the 1990s, first in 1994 through a report entitled “Growing Older in New Canaan,” developed by the New Canaan Study Group for Eldercare at the request of the New Canaan Commission for the Aging. Among its six specific recommendations (of which the creation of our permanent Elder Care Council was one), the only point to remain undelivered upon at present is its specific suggestion to “Establish an Assisted Living Facility before the end of the 1990s [that] should be specifically tailored to the needs of elderly citizens of New Canaan, whose requirements for care and assistance exceed the capabilities of New Canaan Inn, Schoolhouse Apartments and Nursing & Home Care, but whose care needs are not yet so extreme that they require the level of service of Waveny Care Center.”⁹ In evaluating available town senior housing resources, the report candidly stated, “What is missing is a residential link between New Canaan Inn and Schoolhouse Apartments on one end, and Waveny Care Center on the other – a facility which addresses the needs of elderly citizens who can no longer function effectively in their homes but whose requirements for assistance fall somewhere in between the two extremes.”

This concern was echoed in a 1995 study conducted by Van Scoyoc Associates on behalf of Waveny Care Center, and again in the Town’s 1998 Ten-Year Plan issued by the New Canaan Long Range Planning Task Force. Derived from the survey results of more than 600 New Canaan residents and 75 community and government organizations, the plan identified the creation of an assisted living residence as a key priority within the coming decade. Noting the steady growth New Canaan’s 65+ population, the plan advocated the development of “an assisted living program for all income levels, supporting efforts of Waveny Care Center and New Canaan Inn to meet needs for assisted living in the community, and a swimming pool.” Interestingly, the document alluded to an optimal location for such a project in its Open Space and Land Use portion, which declared intent to “preclude any additional development of land within the boundaries of Waveny Park, with the possible exception of a not-for-profit assisted living facility for people of all income levels.”¹⁰ Not surprisingly, the geography at hand is the same as that identified through the Lifespan Study a decade earlier.

Soon thereafter, the Assisted Living Study Group, an ad hoc committee appointed by the Board of Selectmen, was assembled in 1999 in response to the specific recommendation on assisted living within the Ten-Year Plan. The group issued a detailed 38-page report of “Findings and Recommendations” concerning the benefits and logistics of creating such an assisted living residence. The group’s conclusion – firmly based in demographic data, trends, and the reality that aging residents were presently “forced to leave the community”¹¹ to receive residential assisted living services – was that it was essential for the town to commence formal action to support the construction of an assisted living facility. “The insertion of the missing Assisted Living piece,” the report contends, “would form the linchpin in a total support system for the elderly of New Canaan.”

⁹ Growing Older In New Canaan, 1994

¹⁰ New Canaan Ten-Year Plan, 1998.

¹¹ Assisted Living Study Group, Findings and Recommendations, 1999

In such a project's absence, it continued, "this problem will only worsen in the future unless positive steps are taken," especially since "surrounding communities have recognized this need and have proactively and aggressively addressed the problem. The rapid growth of new (for-profit) facilities currently under construction or planned is ample evidence of this phenomenon." This caveat, which alluded to the emergence of local CCRC communities like Edgehill and Meadow Ridge, underscored the reality that New Canaan's seniors would have no other choice but to leave their beloved hometown to secure adequate accommodations.

The members of the study group made several specific recommendations including facility size, type and location. The report advocated the creation of a one- and two-bedroom facility on Town-owned land that "can be supported in the community by New Canaan residents, former residents, and relatives of current residents" and which would "operate in close conjunction with New Canaan Inn and Waveny Care Center...under the same organizational umbrella." The implication of a CCRC is evident. Even more precise than its recommendations for project design, was the report's specificity regarding land use, location and the critical attribute of being able to connect to Town water and sewer systems. Both the parcel bordered by Weed Street and Wahackme Road (now Irwin Park) and the parcel located on the west side of Lapham Road were identified as feasible locations. Ultimately, the report stated, "The recommended site for the new facility is on the west side of Lapham Road just north of the leaf piles, in the triangle between Old Stamford and Lapham Road. This use of undeveloped Waveny property would be consistent with deed restrictions that 'the premises should be held and used for purposes of recreation, health, etc.' and is in accord with the Long Range Plan directive."

Highly noteworthy is that this 1999 report made these recommendations in the midst of Waveny's construction of The Village at Waveny Care Center, stating "after [this project] is completed, New Canaan will still be missing a key piece in the continuum of services and housing, namely a communal grouping of assisted living 1 and 2 bedroom apartments."¹² Upon first glance, one might assume the town's demand for assisted living was satisfied through the 2001 opening of The Village. However, the reality is that the residence, albeit revolutionary in concept, provides assisted living studio apartments exclusively dedicated to people with memory loss. Thus, a palpable gap still remains for assisted living services capable of serving older adults unaffected by dementia, or couples with distinct care needs who seek to reside together in an assisted living environment. **The 1999 report posits a solution: "This type of housing is available in Continuing Care Retirement Communities (CCRCs) and would offer New Canaan seniors another option. This would be particularly attractive to couples and single adults needing more space than a single room provides and would serve as a complement to New Canaan Inn."**

With a new century came continued emphasis on the need to remedy New Canaan's "missing residential link."¹³ The Town's 2000 United Way Health & Human Services Needs Assessment prefaced its "Services to the Elderly" portion with the statement "New Canaan needs to ensure that elderly residents who want to remain in the community can do so while enjoying their accustomed quality of life and as much independence as is safely possible."¹⁴ Citing evidence from precursor Needs Assessments of both 1986 and 1995, the assessment expressed the importance of providing

¹² Assisted Living Study Group, Findings and Recommendations, 1999, pgs 8, 23

¹³ Growing Older In New Canaan, 1994

¹⁴ New Canaan Health & Human Services Needs Assessment, 2000

resources to enable New Canaan's long-time residents to live their later years to their fullest potential within the community: "Many of New Canaan's older residents have spent significant portions of their lives here. They have made and continue to make important contributions to this community. Whether those who want to do so are able to remain in New Canaan depends on New Canaan's ability to provide a seamless continuum of care...If the time comes that they choose to live in a supportive environment, they need a full range of options from assisted living to continuing care." The document gives much credence to the ad hoc committee formed the year prior in recommending that next steps include "the Town [working] with the Assisted Living Study Group toward a solution to the pressing need for an assisted living facility for seniors of all income levels." Similar to concerns expressed in 1999, the assessment warns against the consequences of falling behind the curve of progress in this area: "Neighboring towns have responded to their assisted living needs by permitting the development of commercial facilities. Most of these cater to upper end and upper-middle income seniors." Once again, the reality was reinforced that senior residences in surrounding towns positioned those communities with an advantage and the ability to attract New Canaan's older adult population.

Three years later, the town's 2003 "Plan of Conservation & Development," (adopted every 10 years by the Department of Planning and Zoning as required by State statute) acknowledged the need to expand upon senior residential options in response to "housing needs that can be anticipated based on community conditions and trends and changing demographics." The plan detailed current and potential housing options for New Canaan's aging population and tendered "allow[ing] for-profit congregate, assisted living or life-care facilities as a Special Permit use" as a possible policy option to address apparent needs.¹⁵

By far the most recent and salient of official town studies on the subject of senior needs and concerns is the 2006 Needs Assessment of "New Canaan Residents 65 Years of Age & Older," which was sponsored by the Department of Health & Human Services and our New Canaan Elder Care Council. Through extensive data collection and methodology, the study sought to assess senior needs and identify views on aging, which included the development of a new "expanded definition of 'healthcare'" that reflected heightened consumer expectations of the healthcare system in promoting healthy aging.¹⁶

For the first time, a study measured the intent and plans of its senior community by surveying current concerns, priorities and reactions to new service ideas. Data collected indicated that 18% of New Canaan's current older adult population planned to depart the community within the next five years, 25% of which cite "No Assisted Living/CCRC in New Canaan" as the driving reason.

Moreover, when asked about feelings towards the availability of a CCRC within New Canaan, a remarkable 94% of the senior population perceived the prospect as helpful: 81% indicating the idea would prove "very helpful" and 13% affirming it as "somewhat helpful." The concept scored high across the board and was particularly positive with females ages 65-84 and males 85+.¹⁷

Finally, clear and specific data was derived to support the implications of every study, assessment and report on the issue of senior care and housing since 1989: **New Canaan seniors seek to age-in-place**

¹⁵ New Canaan Plan of Conservation & Development, 2003

¹⁶ New Canaan Plan of Conservation & Development, 2003, pg 12

¹⁷ New Canaan Residents 65 Years of Age & Older: 2006 Needs Assessment, pg 60

within the community, and desire the housing and medical resources and infrastructure to enable them to do so.

Not surprisingly, developments in recent years have reflected the ultimate findings of the 2006 data. One year prior, Waveny Care Network approached the Town of New Canaan in an effort to secure the Windsome Farms property with the intent of achieving a CCRC. The construction of new not-for-profit senior housing and assisted living developments would enable the organization to augment its current continuum of care with the “missing residential links” observed for decades. When the initiative proved unsuccessful the organization tried again, this time entering negotiations at the invitation of St. Mark’s Church in 2007. A variety of challenges including timing and topographical obstacles bore a similarly unfruitful result. But Waveny, undeterred, has made it clear it seeks to deliver upon its mission and commitment to the community to the best of its ability through the continued pursuit of a CCRC.

Simultaneously, a group called “Staying Put in New Canaan” was steadily building momentum and support within the community. With a commitment to maintaining the town’s elder population by easing their need to relocate via increased access to local services, the group’s mission is “to give New Canaan residents both the practical means and the confidence to live their lives to the fullest in their own homes as they grow older.”¹⁸ In the absence of adequate senior housing in New Canaan and the availability of various housing options in neighboring towns, SPNC represents a community’s push to preserve its generational blend.

The missing pieces that would complete a seamless continuum of care through a New Canaan CCRC have been assiduously sought after and represent natural complements to the SPNC effort. As the interest or ability wanes in attending to the multiple tasks associated with maintaining one’s home, or the need grows for greater healthcare supports, a move to a more supportive domicile is both natural and intuitive. The development of a CCRC within New Canaan town boundaries will fill these acknowledged voids and make it significantly easier to effectively maintain and serve our thriving senior population in the safest conditions possible.

¹⁸ Staying Put in New Canaan Mission Statement, adopted April 2006.

History of Waveny Care Network's CCRC Development Efforts:

Waveny Care Network, our community's leading source for eldercare resources, has been consistent in its commitment to fortify a comprehensive continuum of care to serve the growing needs of New Canaan's elder population. Since the Care Center's inception in 1975, the not-for-profit organization has grown to encompass a wide range of services, programs and residential options. Through strategic expansions including the creation of The Village in 2001 and the acquisition of New Canaan Inn in 2002, Waveny has evolved to include independent living (albeit limited), assisted living for people with memory loss, skilled nursing and rehabilitation services, a full-service Adult Day Program, a state-of-the-art Geriatric Evaluation Clinic and a professional Geriatric Care Management team.

Since 2004, the organization's Board of Directors and upper management have been resolute and united in their efforts to achieve a Continuing Care Retirement Community for the purpose of meeting the senior needs identified, yet unfulfilled over the past three decades.

In 2004, the Waveny Board approached the owners of the Windsome Farms property with the express objective of purchasing land for CCRC development to achieve the full spectrum of senior housing options recommended by aforementioned studies, assessments and reports. The project would include an assisted living facility comparable to those repeatedly suggested, and would effectively satisfy long-observable voids in resources. In early 2005, the Board commissioned an appraisal of the property by Wellspeak, Dugas & Kane and retained the services of Retirement Living Services, LLC, one of the nation's foremost developers of premier eldercare housing. Additionally, conversations were held with the department of Planning & Zoning and the Office of the First Selectman concerning the feasibility of the property, given infrastructural requirements necessary to complete a project of this scale. Concurrent with this intent, Waveny requested proposals from several investment bankers to secure tax-exempt financing for the project.

Ultimately, the project was deemed economically unfeasible for a number of reasons. First, the asking price of the land far exceeded its appraised value, which created an insurmountable obstacle in obtaining IRS approval for tax-exempt bonding. Additionally, infrastructural issues – specifically, the necessary creation of a sewage treatment facility and the installation of a mile-long sewer line to connect the property to the existing town sewer system – would have added significant, unanticipated costs to the project. This being the case, the finished development would have been rendered unaffordable for a large sector of the targeted New Canaan senior population. Notwithstanding financial hurdles, geography also posed challenges to the project's practicality. The sheer distance from this potential site to Waveny's main campus was considerably greater than desired, given that many of the benefits of a CCRC are rooted in its proximity and convenient access to a full continuum of services.

Undeterred, the organization revisited CCRC plans the following year when approached by St. Mark's Church about the possibility of purchasing a parcel of land adjacent to New Canaan Inn. Negotiations began in earnest between Waveny and the congregation in 2007. However, despite the best efforts of both parties and the congregation's overwhelming support and official endorsement, this project, too, was ultimately deemed economically unfeasible.

Although the location was ideal and in direct concurrence with the formation a CCRC (it abutted existing Waveny property, was within walking distance of the center of town and two miles of the main Waveny campus), the property itself presented a set of challenges that collectively compromised the economic viability of the project. Chief among these problems were topography, site configuration, limited size, economies of scale, and sensitive issues including the relocation of St. Mark's columbarium. In addition, the fact that Waveny owned an operating facility within the project site (which would have required replacement prior to breaking ground for the CCRC's senior housing component), the project would have entailed a considerably extended and expensive construction timeline.

With these two properties proving unsuitable for a CCRC project, **circumstances have effectively brought us full circle to the recommendations that have gone before: Namely, the conclusions arrived at through the 1989 Lifespan initiative and re-emphasized by the both the 1998 Ten-Year Plan and 1999 Assisted Living Study Group that the most ideal and sensible location for such a project is the undeveloped Waveny property on Lapham Road.** As cited in preceding documents, construction would be consistent with deed restrictions and in accordance with the Long Range Plan directive regarding development upon the Waveny property. Perfectly situated with the closest possible proximity to the main Waveny campus, the accuracy and insight of the 1999 recommendation is unquestionable: "The approval of the proposed site is critical to the project. There are no viable alternative sites in town, and even if there were, the costs of acquiring private land and obtaining financing would put rates at the new facility out of reach of moderate and lower income groups."¹⁹

New Canaan seniors have made it irrefutably clear that they seek to age-in-place and desire the resources and infrastructure to enable them to do so. As a community respectful of our elders' contemporary definition of "healthcare,"²⁰ we bear an obligation to provide for their needs: Our inaction in response to decades-old recommendations has effectively ousted older adults from New Canaan in pursuit of the resources they seek. Further inaction will only perpetuate the trend and result in this valued group of citizens' continued exodus.

Now, more than ten years since our own 1998 Ten-Year Plan, it is incumbent upon the town of New Canaan to act upon the long-identified needs and unfulfilled recommendations that have been put forth for years. It is time to join together with our valued partners in senior service and support Waveny Care Network in moving forward to establish a New Canaan-based assisted living/Life Care Community on the Lapham Road property.

¹⁹ Assisted Living Study Group, Findings and Recommendations, 1999

²⁰ New Canaan Plan of Conservation & Development, 2003, pg 12

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