

ACTION ITEM #1

Establish an Institute for Senior Living (Daniel J. Bernardo)

May 4, 2018

TO ALL MEMBERS OF THE BOARD OF REGENTS

SUBJECT: Establishment of an Institute for Senior Living

PROPOSED: That the Board of Regents establish an Institute for Senior Living.

SUBMITTED BY: Daniel J. Bernardo, Provost and Executive Vice President

SUPPORTING
INFORMATION:

The Carson College of Business' School of Hospitality Business Management proposes the creation of the Institute for Senior Living (ISL). The mission of the Institute will be to serve as a global center of senior living excellence, delivering the operational benefits of healthcare, technology, hospitality, education, and policy to the point of service.

The Institute for Senior Living will be a world-class institute for teaching, research, and service that brings together industry leaders, academics, and students. Through conferences, forums, and partnerships, the ISL will strive to understand and improve the role of senior living managers and the tools and programs of operators of senior living businesses. The Institute's efforts will be focused on supporting one of the fastest-growing, demographic-driven businesses in the world economy. While housed in the School of Hospitality Business Management (SHBM) in the Carson College of Business, there will be collaborative partnerships across the Washington State University system. In addition to Hospitality Business Management, other participating units/colleges include, but are not limited to, Psychology, Nursing, Human Development, and Electrical Engineering. In particular, once fully funded, the ISL will:

- Become a named institute (\$2.5M initial investment required).
- Collaborate on the creation of a credentialing certificate program for industry professionals.
- Provide a funded multi-day field trip for students enrolled in Hospitality Business Management (HBM) 375 – Introduction to Senior Living Management each semester it is offered face-to-

face (a virtual field trip is being developed for the Global Campus course).

- Fund travel for up to ten (10) students to attend senior living industry conferences—Argentum, NIC, CALA, ASHA (as examples).
- Connect students with opportunities for application of theory through internships as an option for earning hours toward the 1000 required for graduation.
- Guide the curriculum development for a new course HBM 475 – Advanced Senior Living Management.
- Facilitate the curriculum development of a transdisciplinary major in Senior Living Management.
- Scholarship awards to up to four students each year.

In addition to the teaching aspects outlined above, the Institute will also facilitate research and service, often through a very integrated approach to answer the questions of 21st century senior living enterprises. Examples may include, but are not limited to:

- A longitudinal study tracking students who took HBM 375, looking in particular at:
 - Placements in industry (internships and career) influenced by field trips
 - Placements in industry (internships and career) influenced by funded conference travel
- Transdisciplinary projects pairing faculty and students with senior living community executives, management, and residents.
- Possible opportunities for collaborative research on menus/nutritional issues/resident satisfaction.
- Industry-sponsored/grant-funded transdisciplinary research projects.
- Creation of a transdisciplinary, open-access, peer-reviewed journal (<https://www.martineve.com/2012/07/10/starting-an-open-access-journal-a-step-by-step-guide-part-1/>)

The complete proposal for the Institute for Senior Living is attached. This proposal was reviewed carefully and has support from the Provost's Office. This recommendation was passed by the Faculty Senate on January 25, 2018.

The College of Business proposes establishment of the Institute for Senior Living effective as soon as feasible.

ATTACHMENT: Attachment A

**Proposal for the
Institute for Senior Living**

**School of Hospitality Business Management
Carson College of Business
Washington State University**

**Submitted to the Faculty Senate Office
Fall 2017**

Contact Information:

Nancy Swanger, Ph.D.
School of Hospitality Business Management
Carson College of Business
Todd Hall 342A
P.O. Box 644736
Pullman, WA 99164-4736
swanger@wsu.edu
509.335.2443 (office)
509.335.7736 (fax)

1. Name of the Unit:

Institute for Senior Living (ISL)

2. Nature and Scope of Activities:

Mission: To serve as a global center of senior living excellence, delivering the operational benefits of healthcare, technology, hospitality, education, and policy to the point of service.

The Institute for Senior Living will be a world-class institute for teaching, research, and service that brings together industry leaders, academics, and students. Through conferences, forums, and partnerships, the ISL will strive to understand and improve the role of senior living managers and the tools and programs of operators of senior living businesses. The Institute's efforts will be focused on supporting one of the fastest-growing, demographic-driven businesses in the world economy. It will be housed in the School of Hospitality Business Management (SHBM) in the Carson College of Business with collaborative partnerships across the Washington State University system. In addition to Hospitality Business Management, other participating units/colleges include, but are not limited to, Psychology, Nursing, Human Development, and Electrical Engineering. In particular, once fully funded, the ISL will:

- Become a named institute (\$2.5m initial investment required).
- Collaborate on the creation of a credentialing certificate program for industry professionals.
- Provide a funded multi-day field trip for students enrolled in HBM 375 – Introduction to Senior Living Management each semester it is offered face-to-face (a virtual field trip is being developed for the Global Campus course).
- Fund travel for up to ten (10) students to attend senior living industry conferences—Argentum, NIC, CALA, ASHA (as examples).
- Connect students with opportunities for application of theory through internships as an option for earning hours toward the 1000 required for graduation.
- Guide the curriculum development for a new course HBM 475 – Advanced Senior Living Management.
- Facilitate the curriculum development of a transdisciplinary major in Senior Living Management.
- Scholarship awards to up to four students each year.

In addition to the teaching aspects outlined above, the Institute will also facilitate research and service, often through a very integrated approach to answer the questions of 21st century senior living enterprises. Examples may include, but are not limited to:

- A longitudinal study tracking students who took HBM 375, looking in particular at:
 - Placements in industry (internships and career) influenced by field trips
 - Placements in industry (internships and career) influenced by funded conference travel
- Transdisciplinary projects pairing faculty and students with senior living community executives, management, and residents.
- Possible opportunities for collaborative research on menus/nutritional issues/resident satisfaction.

- Industry-sponsored/grant-funded transdisciplinary research projects.
- Creation of a transdisciplinary, open-access, peer-reviewed journal (<https://www.martineve.com/2012/07/10/starting-an-open-access-journal-a-step-by-step-guide-part-1/>)

Assessment Plan: The effectiveness of the Institute for Senior Living will be reviewed every five years against the following measurable outcomes:

1. The number of publications¹/presentations generated by participating faculty particular to the initiatives of the ISL (baseline to be established)
2. The number of external funding proposals submitted/funded based on ISL collaborations (baseline to be established)
3. Year-over-year increases in development dollars realized
4. Year-over-year increases in certificate program enrollment
5. Growth in undergraduate enrollments in senior living courses (inclusive of Senior Living Management majors upon submission/approval of required documents)

3. Criteria and Method of Selection of Director and Core Participating Faculty

Core faculty (see curricula vitae):

Name	Rank/Position	Department
Nancy Swanger	Associate Professor & Director	Hospitality Business Management
Scott Eckstein	Clinical Assistant Professor: Senior Living Executive in Residence	Hospitality Business Management
Maureen Schmitter-Edgecombe	Professor	Psychology
Laura Hill	Professor & Chair	Human Development
Cory Bolkan	Associate Professor	Human Development – WSUV
Deb Nelson	Instructor	Human Development
Diane Cook	Professor	Electrical Engineering and Computer Science
Catherine Van Son	Associate Professor	Nursing – WSUV
Shelly Fritz	Assistant Professor	Nursing – WSUV

¹ *Peer-reviewed journal publications:* It has been said numerous times that collaborative grant-funded research proposals from the participating faculty in the Institute will be strengthened because of the transdisciplinary involvement. There will be some opportunities for research collaboration with academics from other universities who might be doing some work in this space, on the fringe, but want to expand their work to include operationally based projects.

Industry/trade journal publications: What is already happening at WSU in the senior living space is generating a lot of buzz in the industry/trade journals. This positive press will only increase the exposure when the Institute is formally recognized, drawing additional support for its initiatives from external audiences.

Zihui Ma (former PhD Student in hospitality)	Clinical Assistant Professor	UNLV
--	------------------------------	------

Dr. Swanger, Associate Dean and Director of the School of Hospitality Business Management, will assume the primary leadership and management responsibilities of the ISL as Director. Other core participating faculty noted in the table above. Thus, the ISL advisory board will consist of the current ISL Director, ISL core faculty, and industry partners.

The criteria for selecting the ISL Director are as follows:

- 1) The ISL Director is appointed by the Dean of the Carson College of Business.
- 2) The ISL Director must be a current faculty member in the School of Hospitality Business Management.
- 3) Preferably, a candidate for ISL Director should have the rank of Associate or Full Professor (Assistant Professors can be considered, but this decision is left to the discretion of the Dean).

The director of the ISL will serve upon appointment of the dean of the Carson College of Business for a term of five years. As the ISL will be reviewed every five years, a review of the director will coincide. The dean may choose to reappoint the director or appoint someone else to the position. Additionally, the dean may choose to review the director’s performance at any point within the five-year cycle (suggested each year during the annual performance review) to monitor accountability.

The Senior Living Executive in Residence position is on current-use 17A money. Going forward, the position will be funded using additional 17A monies or through the revenue generating opportunities in the School of Hospitality Business Management (both through the Institute and in other endeavors already in place). The role of the position is to be the conduit between the senior living industry and the academic enterprise of the hospitality school, culminating in curriculum, professional programming, research opportunities, and internship creation that is relevant.

The criteria for selecting the ISL core faculty are as follows:

- 1) Faculty members (all ranks are eligible) who have a vested interest in senior living, hospitality management, human development, nursing, psychology, engineering, and other relevant fields are nominated by the ISL Director.
- 2) ISL core faculty members are formally appointed by the Dean.

4. The College(s) and/or Departments(s) to be Involved:

The School of Hospitality Business Management will oversee the operation and direction of the ISL, assuming a leadership role in all associated activities. Faculty from other colleges, departments, and/or campuses include, but are not limited to:

- Human Development
- Nursing
- Psychology
- Electrical Engineering

- Vancouver

While the ISL will be housed in the School of Hospitality Business Management, it is a separate functioning unit with its own purpose, funding, and faculty involvement. The administrative assistant for the ISL, in support of the director, will help coordinate all activities and monitor all resources of the ISL as duties separate from the daily operations of the SHBM. Aside from the SHBM (Nancy Swanger and Scott Eckstein), all other participation is at the faculty level. This will likely evolve over time with both involvement at the department level of other units and the addition of other faculty/units where there are synergies. An organizational chart is contained in Figure 2.

Current suggested faculty will help set the research agenda for potential transdisciplinary collaborative projects. This group has already worked on the creation of the curriculum for the proposed curriculum for a major in senior living management (forthcoming). Other potential duties may include, but are not limited to:

- Participate in meetings with the Steering Committee
- Form the core of a scholarship committee
- Evaluate proposed research projects for seed funding
- Guest lecture in senior living courses, where applicable

5. Amount of budgetary support requested

The ISL will receive budgetary support from the Carson College of Business (per Dean Chip Hunter) through the hiring of an administrative support person (\$40k-\$50k, plus benefits). All other funding will come from external sources (see Sections 6 and 12 in this proposal).

6. Expected funding needed from university, state, external awards or gift sources:

Aside from the administrative support position identified in Section 5, all other funding for the creation and maintenance of the ISL will be sourced from external donors and endowed for use in perpetuity. Planning for a 4% annual return of a naming investment of \$2,500,000 investment, the funds will be held in an excellence fund and may be used for the following (not all inclusive):

Research Fellows (seed grant money to non-HBM faculty listed in #3)	\$ 60,000
Scholarships	10,000
Student Travel	10,000
Promotional Materials/Miscellaneous	20,000
Total:	\$100,000

In addition to the planned endowment, there is already a \$3M legacy gift on record specifying the senior living program as the recipient in its gift use agreement. That was not originally included in the budget as legacy gifts can change at any time until they actually materialize; however, the donor is very committed to this initiative, living in a senior living community

herself. Since April, nearly \$500K has been committed to the endowment (\$250 already signed and processed), with another \$1.5M out in formal proposals under consideration. This fundraising has been a grassroots effort from senior living industry professionals on behalf of the institute; the support is very strong. Additionally, current use monies totaling more than \$600K, raised previously, from the industry have been used to fund the clinical professorship position housed in the School of Hospitality Business Management (SHBM) since March 2016.

Initially, any growth in enrollment would be supported within the current funding for the clinical professorship; capacity building would be strategic, and there is currently plenty of room for growth without the need for instructional resources beyond what is already available. The SHBM has discretionary budgets for items such as scholarships and student travel that could be used for the senior living initiative, if needed; however, it would not be prudent to build those into this budget as they may not be needed and could be used elsewhere in the department. Within the SHBM, there are currently two majors: Hospitality Business Management (HBM) and Wine and Beverage Business Management (WBBM). Of the 340 certified majors in the department, only 20 are in the WBBM major. The WBBM major, like the proposed major in Senior Living Management, is also transdisciplinary. While it does not draw large enrollments, it is resource neutral, as the required courses in the major already exist on campus. This model will be the same for senior living; the expected impact on other majors will likely be slight, probably well under 10%.

The SHBM has been doing work in senior living since 2010, with a heavy investment of time, talent, and treasure from the industry since the beginning. That investment has included development and delivery of HBM 375 (Introduction to Senior Living Management) in both face-to-face and online formats. Guest speakers were in every class at the beginning (traveling to Pullman at the expense of their company) and still participate regularly now that Scott Eckstein's position has been funded to lead the effort. Companies designed group projects and mentored student teams over the course of the semester. Scholarships are awarded each year from endowed and current-use monies. Recruiters from senior living companies participate in our online and on-campus career fairs each year. Much of what has been done in this space will continue regardless of future funding. The new funding would allow for research fellowships and other programs outlined in the original proposal. The real potential for revenue to support the program, if no other dollars are realized, will come from the launch of the professional development, non-credit bearing certificate program.

Since the first course in senior living was offered (HBM 375), 238 students have enrolled in 9 sections (7 FTF sections, 2 online sections), generally with semester-over-semester growth occurring. There is no certificate program, currently, targeted to industry professionals involved in community operations. Argentum, one of the largest senior living trade associations, has developed a credentialing examination to help standardize knowledge and practice in community-based operations. WSU has worked with Argentum to dovetail the modules into their exam; they are very supportive of the launch of this certificate. While exact enrollments are

not known, the senior living industry is already short at least 1.2 million qualified employees to meet the demand of running communities.

This proposal contains no comparison to other programs across the country because there are none using this same model—that is what makes it so attractive to the industry. In addition to the potential contributions of those involved in the institute, being the first to market with such would certainly help WSU in its Drive to 25 with additional exposure and opportunities on multiple dimensions.

7. Needs for space, equipment, and supplies (currently available and needed now):

There is no need for space, equipment, or supplies for the ISL. Most activities will be organized out of the current space occupied by the School of Hospitality Business Management.

8. Expected contribution to and impact on the instructional programs:

The educational mission for the ISL will be directed at preparing students for positions with senior living companies, with the institute providing significant practical education and training in integrated learning experiences. The ISL will contribute to the following instructional program areas within the School of Hospitality Business Management:

- HBM 375
- HBM 475 (upon development and approval by the faculty)
- Transdisciplinary major in senior living management (upon development and approval by the faculty)
- 1000-hour internship requirement for majors
- 400-hour internship requirement for minors

In addition, other disciplines/units/activities across the university may also benefit from exposure and/or research activities taking place in the institute. Those include, but are not limited to:

- Human Development
- Nursing
- Psychology
- Electrical Engineering
- Food Science
- Business Plan Competition
- Undergraduate/graduate research

All activities associated with the senior living initiative at WSU will be housed under the Institute for Senior Living umbrella. The first module of the certificate program is scheduled to launch on November 01, 2017. Please see the attached rollout schedule (Figure 1).

Since 2012, the SHBM has expanded to all campuses in the WSU system, with the exception of Spokane (preliminary discussions for doing so, however, have already taken place). The goal is to leverage resources and expertise across the system as there are not funds to be all things to all programs at all locations in a silo model. In fact, Scott Eckstein's position (the clinical professor

hired with industry funds), is housed on the Everett campus. Other faculty involved in this initiative are housed on the Vancouver campus. The SHBM currently has a sponsored lecture series, recruiter visits, career fairs, and course delivery that are all streamed to other campuses in real time. The certificate program will be delivered online and on demand for greater accessibility. Additionally, one of the advisory board members for the business programs on the Vancouver campus is a senior living executive whose company headquarters are in Vancouver (Patrick Dooley, COO, Milestone Retirement Communities, LLC). It is believed this Institute for Senior Living can be exactly the model for other cross-campus initiatives at WSU.

9. Expected contribution to the university and other clients:

The ISL will provide both WSU and the Carson College of Business with an effective development lever. It has been said multiple times that the School of Hospitality Business Management is the “face” of the college and the university, similar to that of athletics. Through collaborative partnerships internal and external to WSU, expected contributions could include:

- Grant monies from sponsored research or from more traditional grant-funding agencies where the addition of business would be considered value added
- Reputational enhancement as the leading expert in senior living operations
- Development opportunities around specific initiatives in senior living, collectively and by unit
 - Endowed professorships
 - Naming opportunities (particularly for the professional certificate program)
 - Scholarships
 - Research/travel funds

While the senior living industry has been, and will continue to be, very involved in this initiative at WSU, there will be a clear separation of roles and responsibilities of involved parties. At no time will the activities of the institute breach conflict of interest principles. Development dollars will be routed through the WSU Foundation, adhering to all requirements of gift giving to the university. Industry donors can be prescriptive in their gift use agreements; however, all parties must be willing to agree to the terms prior to signing. Industry-sponsored research will adhere to ethical research practices for the entire duration of the project. The steering committee, the bulk of which will be composed of industry leaders, will be advisory only. Their overarching purpose is to help the faculty involved in the institute stay current with relevant industry issues, problems, and opportunities.

The goodwill of participating in, and contributing to, the educational process provided through the activities in the ISL will also contribute to an invaluable and far reaching public-relations effort.

10. Supporting letters from chairs, deans, and/or other individuals to whom the unit director will report or work with:

Included is a supporting letter from Chip Hunter, Dean, Carson College of Business.

11. Impact

The ISL is being designed to achieve a positive impact on three critical dimensions: 1) undergraduate education, 2) development, and 3) collaborative sponsored research. Thus, the creation of the ISL provides a number of benefits to key Carson College of Business stakeholders. Additionally, the resources and mission of the ISL also have the potential to have a positive impact on WSU colleges and units outside the Carson College of Business. Students are provided with valuable opportunities to learn a transdisciplinary curriculum (pending development and approval of a new major). Faculty can work together on research projects, incorporating undergraduate and graduate students where appropriate. Industry partners are not only provided with valuable resources for solving problems they face in today's complex global economy, but also with a valuable human resource stream.

Because the Carson College of Business does not rely on external grant funding for its research, the ability to collaborate with others across WSU to add value to their research proposals will be paramount. With the proposed funding opportunities, the ISL will, over time, be able to provide participating faculty with some research dollars to launch projects (perhaps as pilots) that might attract additional external funding from private sources or more traditional grant-funding agencies. The ISL will rely on the expertise of participating faculty outside of the CCB on how best to coordinate the research agenda as it relates to taking advantage of external funding opportunities.

12. Future Funding Opportunities

The Institute for Senior Living (named with a gift of \$2.5m) will be the umbrella under which all other senior living activities and named gifts are housed. Those may include, but are not limited to:

- **Clinical Professorship – \$2.5m endowment (4% return annually)**
 - Position will teach and oversee industry relations, in perpetuity
- **Distinguished Professorship – \$5m (4% return annually)²**
 - Position will teach and oversee research activity, in perpetuity
- **Student Experiential Learning – current-use gifts totaling \$40k annually or \$1m endowment (4% return annually)**
 - Conference Travel, Field Trips, Industry Visits, Class-related Projects
- **Scholarship Awards³ – current-use gifts totaling \$40k annually or \$1m endowment (4% return annually)**
 - Annual scholarship support for students each year
 - Minimum award of \$2500

² It is unlikely the Library will be impacted beyond current demand from the involved units across campus; thus, no discussion with Library administration has taken place. As this is a trans-disciplinary initiative, subscriptions/accesses to relevant journals within specific disciplines are likely already in place. However, with a professorship and possible resulting grant funding, the creation of an open-access journal that is senior living centric is likely to evolve over time. There has also been discussion about the writing of an e-text for senior living, as none currently exists.

³ All gift amounts for scholarships will be accepted and used accordingly; there is no real minimum or maximum in the scholarship category.

- **Applied Research Activities – current-use gifts totaling \$100k annually or \$2.5m endowment (4% return annually)**
 - Competitive internal research grant funding
 - Transdisciplinary seed grant funding
 - Graduate student funding
- **Professional Certificate Program – \$2m endowment (4% return annually)⁴**
 - Marketing, recruitment, and support of program participants
 - Facilitate faculty in development of additional certificate offerings (various levels)
 - Facilitate translation and delivery of certificates in the global markets
- **Annual Lecture Series – \$250k endowment (4% return annually)**
 - Travel/honorarium for key industry leaders
- **Excellence Fund – Already established, unlimited growth opportunity**
 - Discretionary fund used where needed to enhance senior living initiatives

⁴ Enrollment/revenue/expense projections from the Global Campus are included as a separate attachment.

Figure 1: SENIOR LIVING MANAGEMENT CERTIFICATE ROLLOUT SCHEDULE⁵



Summary

Thank you for your interest in taking the Senior Living Management Certificate offered through Washington State University School of Hospitality Business Management.

There are two registration options open to you. You may choose to register for all seven courses in the certificate program now or you can register for each course individually. The courses are self-paced and the certificate duration is approximately 9 months.

Please choose your preferred registration option below:

Course	
Senior Living Management Certificate: Full Program All seven courses for \$2,250	New Registration
Senior Living Management: Financial Management Course Launches: November 1, 2017 \$350	New Registration
Senior Living Management: Leadership Course Launches: January 1, 2018 \$350	New Registration
Senior Living Management: Customer Experience/History and Philosophy Course Launches: February 1, 2018 \$350	New Registration
Senior Living Management: Operations Management Course Launches: March 1, 2018 \$350	New Registration
Senior Living Management: Resident Care and Services Course Launches: April 1, 2018 \$350	New Registration
Senior Living Management: Sales & Marketing Course Launches: May 1, 2018 \$350	New Registration
Senior Living Management: Regulatory Compliance & Risk Management Course Launches: July 1, 2018 \$350	New Registration

⁵ Please note this registration site goes live the week of 10.23.17 and the removal of the Everett campus designation is a pending edit.

Figure 2: INSTITUTE FOR SENIOR LIVING ORGANIZATIONAL CHART

