Examining Key Factors and Influential Actors Involved in the Decision to Relocate into Assisted Living: A Sample Funding Proposal
PRESENTATION OUTLINE

- **Introduction & Extended Literature Review Discussion**
  - Introduction
  - Significance/Purpose/Research Questions
  - Literature Review
    - Relocation and Migration Theories; Reasons for Relocation; SH & AL Defined; Critical Review of Current Research

- **CIHR Proposal Outline Discussion**
  - Section 1: 1 page overview of proposed research
  - Section 2: body of research proposal
    - intro. (rationale, objectives); background literature; research methods; restatement of significance
  - Section 3: appendices
    - info. letters/informed consent; observation guidelines; interview questions
  - Section 4: reference list

- **Project Timeline/Deadlines Discussion**
INTRODUCTION

○ Relocation in Late Life
  - Result of 4 events: retirement, mod. disability, widowhood, severe dis.

○ Theoretical Perspectives
  - Push/Pull Theories (Wiseman & Roseman, 1979)
    - pull: attractive feature of new destination
    - push: negative aspects associated w. old residence
  - Lifespan Development Theories (Litwak & Longino, 1987)
    - 3 types of moves: amenity, assistance, or disability/dependency

○ Moving Despite Goal to Age in Place
  - Figures for number of Cdn. movers over 65

○ Available Types of Housing
  - Supportive Housing & Assisted Living (brief statement of differences)
SIGNIFICANCE, PURPOSE, & RQs

- **Significance/Justification**
  - Influence of aging population
  - Select social, economic, and health trends influencing need for specialized housing

- **Purpose**
  - The overarching goal and purpose of this proposed research is to broaden/expand/contribute to/support our understanding of the decision to relocate in later life. The study has two main objectives:
  - To identify factors that affect the decision making process of an older adult in relocating from one’s home into a purpose-built assisted living facility.
  - To identify key actors and the roles they play in the decision making process of the older adult as it relates to relocation into a purpose-built assisted living facility.

- **Research Questions**
  - What are the **factors** that influence an older adult’s decision to relocate from home into an ALF?
  - Who are the key **actors involved** (and what roles do they play) in an older adult’s decision making process as it relates to relocation from home into an ALF?
EXTENDED LITERATURE REVIEW

- **Residential Relocation & Migration Theories**
  - Influence of work of Lawton (competence and press)
  - Push/pull models
  - Lifespan development theories

- **Reasons for Relocation**
  - Push/pull factors and an combination of overlapping push/pull reasons
  - Balancing gains and losses associate with new and old residence
  - Owning the decision to relocate (again, balancing gains with losses)

- **Retirement Communities Defined**
  - Supportive Housing: housing + hospitality services
  - Assisted Living: housing + hospitality services + personal care support
  - Key features of SH & AL
    - environment, organizational, managerial features (2 in each category)
EXTENDED LITERATURE REVIEW

- Limitations of Current Research
  - Most useful studies for lit. rev. focus on US communities (CCRCs and AL)
  - Cdn. research from CMHC focused on life lease
  - Most studies include post-occupancy interviews only
    - track pre and post occupancy feelings
STUDY DESIGN

○ **Research Design**
  - Two phase qualitative investigation
  - 1 year timeline and $50,000 budget

○ **Methods - Data Collection**
  - **Observations** of participants’ initial visit to ALF
    - 10-20 visits/site = 40-80 total tours observed
    - Each visit 45min to 1 hr
  - **Interviews** with newly relocated AL resident and most involved friend/family member
    - 5 dyads/site = 20 total dyads (40 people)
    - 2 hrs/dyad (resident interview 90min + decision influencer 30 min)

○ **Methods - Sampling & Recruitment**
  - **Observations**: senior + family/friend on tour
  - **Interviews**: 75+, 1-3 months in ALF, English
STUDY DESIGN

○ Study Sites
  - 2 Public ALFs: Clarendon Court & Honoria Conway
  - 2 Private ALFs: Amica at West Vancouver & Sunrise Vancouver

○ Data Analysis
  - initial and thematic coding observation field notes and transcribed interviews
  - ongoing content analysis for key themes, patterns, concepts from all data collected
  - Establishing Trustworthiness
Section 1: Proposal Introduction (1 pg. overview)
- Study rationale
- Objectives
- Methods
- Significance

Section 2: Body of Proposal
- Expanded discussion of rationale and significance
- Re-statement of objectives
- Presentation of most relevant background literature
- In-depth discussion research methods
  - design; setting; data collection methods (int. & obs), sampling and recruitment, data analysis, communication and presentation of results
- Re-statement of significance of and justification for this type of research
Section 3: Appendices
- Letters of information and informed consent
- Observation guidelines
- Interview protocol
  - Qualifying and background questions (SES, age, etc.)
  - Interview questions (divided into thematic areas)
- Proposed budget
  - Personnel
  - Equipment
  - Services
  - Supplies
  - Travel

Section 4: Reference List
TIMELINE & DEADLINES

- **Fri. Sept. 14/12** (for Mon. Sept. 17/12 meeting)
  - submit FIRST DRAFT of introduction, literature review, and methods
  - presentation of outline for CIHR funding proposal

- **Tues. Oct. 9/12** (for Fri. Oct. 12/12 meeting)
  - submit FINAL COPY of introduction, literature review, and methods
  - submit FIRST DRAFT of CHIR proposal skeleton
    - appropriate headings, information included wherever possible but ideas/unclear sections acceptable

- **Tues. Nov. 6/12** (for Fri. Nov. 9 meeting)
  - submit DRAFT of final copy CIHR proposal
    - including appendices (observation guide, interview protocols, budget, etc.)

- **Week of Dec. 3-7/12:** presentation of final paper
  - allows 2 weeks (if needed) to complete revisions (library deadline is Fri. Dec. 21/12)