



An investigation of housing needs supplied by a retirement center in Bozeman, Montana
by Helen Dirl Jorgensen

A thesis submitted to the Graduate Faculty in partial fulfillment of the requirements for the degree of
MASTER OF SCIENCE in Home Economics
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Abstract:

The purpose of this study which was done at Montana State University in 1965-1966 was to determine how the physical- plant, the rooms and apartments, the entire building, and the grounds met the physical v social, and routine needs of forty selected residents of Hillcrest Retirement Center in Bozeman, Montana. The data was obtained by structured interviews. Then, the findings were compiled and the replies were summarized.

Conclusions supported by this study are that this type of housing did meet the needs of the retired elderly and that it was not an inexpensive answer to retirement living. Further, the residents interviewed concurred that moving to a retirement center should not be done until such a move was necessary. Finally, the recreation most frequently reported by those interviewed was the Thursday night planned entertainment , chapel services, walking, reading and visiting with other residents. The other facilities furnished by the retirement center that were used infrequently were the shuffleboard and billiard table room, weaving and sewing room, and television lounge. These findings could be significant to local, state, and federal committees plus church, fraternal and private agencies that are planning housing for senior citizens.

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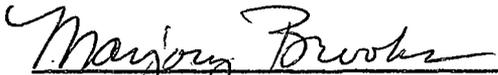
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ABSTRACT

The purpose of this study which was done at Montana State University in 1965-1966 was to determine how the physical plant, the rooms and apartments, the entire building, and the grounds met the physical, social, and routine needs of forty selected residents of Hillcrest Retirement Center in Bozeman, Montana. The data was obtained by structured interviews. Then, the findings were compiled and the replies were summarized.

Conclusions supported by this study are that this type of housing did meet the needs of the retired elderly and that it was not an inexpensive answer to retirement living. Further, the residents interviewed concurred that moving to a retirement center should not be done until such a move was necessary. Finally, the recreation most frequently reported by those interviewed was the Thursday night planned entertainment, chapel services, walking, reading and visiting with other residents. The other facilities furnished by the retirement center that were used infrequently were the shuffleboard and billiard table room, weaving and sewing room, and television lounge. These findings could be significant to local, state, and federal committees plus church, fraternal and private agencies that are planning housing for senior citizens.

CHAPTER I

The Nature of the Problem

Adapting housing to the needs of elderly persons is a problem that only recently has attracted public attention (1). Two thousand citizens in the United States reach the retirement age of sixty-five every day, and because of increasing changes in their physical and mental health requirements many of these citizens will not continue to live in their own homes (8). Musson and Heusinkveld (8) describe the housing in which older people live as protected living, independent living, and assisted living. By independent living is meant housing in which senior citizens are entirely self-sufficient, unassisted and do their own housekeeping. Assisted living describes a pattern of living in which the elderly are not responsible for their own housekeeping and in which various services and sometimes mild supervision are supplied by the management of the home. The term protected living applies to homes in which the senior citizens are completely supervised with provisions being made not only for all the services which might be necessary but also for health protection and treatment.

Following these descriptions, the Hillcrest Retirement Center, located on a grassy hill one-half mile from downtown Bozeman, Montana, which affords a beautiful view of the Gallatin Valley, the Spanish Peaks and the Bridger Mountain Range, provides assisted living for the older people who choose to live in this type of housing for the aged.

An award of merit in architectural design was awarded Hillcrest by the Federal Housing Administration in 1963. Special safety features such

as carpeted and lighted halls with hand rails on each side and the use of non-skid wax on stairs that have been scaled to older people's needs were reported.

The Methodist Church through the Bozeman Deaconess Foundation operates Hillcrest as a non-profit program of service.

Before a resident enters he is required to sign one of the three plans and a contract (Appendix I) which states the life time occupancy fee as well as other conditions. The life time occupancy fee is a prepaid rental for the room or apartment for the life of the resident. After the death of the resident the apartment is re-sold, and any remainder of the life time occupancy fee becomes the property of Hillcrest. If the resident wishes to leave, a portion of the life time occupancy fee is refunded. A prospective resident may live in Hillcrest on a trial basis for thirty days.

In addition to the life time occupancy fee the resident pays a monthly maintenance fee and a fee for life and health insurance. The monthly care charge provides utilities, maid service, linen and linen laundry, meals and thirty days of free care in the health unit, including drugs. The residents provide their own furnishings, except for wall to wall carpeting.

There are five styles of rooms and apartments at Hillcrest. These differ in the number and size of rooms, amount of storage space, available facilities, and fees. Following are descriptions of these five types of accommodations (Appendix II).

1. The Arcadia provides two hundred and forty square feet, plus

twelve lineal feet of balcony, which gives a resident a complete living unit containing a full bath and combination sleeping and living space. Type one, of which there are fifteen, has a closet in the hall and one in the bathroom. Type two, of which there are twelve, has one roomy eight foot closet facing the living area. Except for the size of the apartments, a resident in Arcadia enjoys the same privileges of the home as do the residents of the larger units. The fee for life time occupancy in one of the Arcadia units is \$7,000, and the base monthly care charge is \$150 for one person. A second person in one of these units would pay \$115.

2. The Belmont with three hundred twenty square feet plus sixteen lineal feet of balcony has several additional features. Type one, of which there are thirty-six, provides 45 per cent more living space than the Arcadia plus other features such as a bathroom storage closet in addition to plumbing and wiring for a kitchenette. Type two, of which there are twelve, features an eight foot dressing table in the bathroom plus 27 per cent more living space than the Arcadia unit. This unit requires a life time occupancy fee of \$9,000. The base monthly charge for care is \$160 for one person in all Belmont units. A second person would pay \$115.
3. The Crestview apartment provides four hundred square feet plus twenty lineal feet of balcony, and a large living area

with 90 per cent more living space than Arcadia. All thirty-six units have a bathroom storage closet and are plumbed and wired for a kitchenette. If desired, the living area can be divided into a separate living area and bed alcove. This can be done by installing folding doors or by using a planter or a shoulder high bookcase, supplied by the resident. Amply large for two persons, the fee for life time occupancy is \$11,500. The base monthly care charge is \$170 for one person. A second person would pay \$115.

4. The Dunhaven with five hundred sixty square feet plus twenty-eight lineal feet of balcony, makes an ideal unit for a couple or a person wanting a large private living area. All six units feature a spacious living room and a completely separate bedroom. Storage space includes a five foot hall closet and an eight foot bedroom closet. The dining area also has plumbing and wiring for a kitchenette. The fee for life time occupancy is \$16,000 and the base monthly care charge is \$195 for one person. A second person would pay \$115.
5. The Esterbrook, the largest unit, provides one thousand one hundred fifty two square feet plus sixty-four lineal feet of balcony. Three apartments of this type are located respectively on the second, third and fourth floors of the south end of the south wing and afford a view of almost three hundred sixty degrees. Special features include a fully equipped tiled kitchen, a twelve foot fireplace of native stone on one

wall of the six hundred square foot living room. A seven foot closet is located at the entrance. Next to the bathroom is a storage closet which can be converted to a half bath if desired and the bathroom itself contains a double eight foot dressing table. The bathtub and shower are enclosed by glass sliding doors. The two bedrooms each contain an eight foot clothes closet. The Esterbrook would provide ample space for a couple or a couple and a single person. The life time residence fee is \$32,000. The base monthly care charge is \$250 for one person. A second person would pay \$115.

Other facilities which are available to the residents at Hillcrest include automatic washers and dryers for personal laundry, beauty parlor, wood working shop, green house, weaving and sewing room, lounges, television room and a recreational room which provides further areas for hobbies and recreational facilities. Some kitchens are available on each floor in each wing for personal entertaining. An electric range, table, and sink are provided. Some kitchens have refrigerators that have been provided by the residents. On Sunday evenings chapel services are held. Each Thursday evening entertainment is provided which may be a travel movie provided by an oil company, a lecture, or a special musical program presented by a local school group. Although transportation is provided to town twice a week and to church on Sunday, residents may maintain a personal car for which heated garages are provided. At his own expense, a resident may have a telephone installed. All rooms have telephone wiring to facilitate telephone service.

This study was planned to investigate the problem of how the physical plant facilities, the rooms and apartments, the entire building and grounds of Hillcrest Retirement Center have met the personal, social, and routine needs of forty selected residents.

CHAPTER II

Background of the Problem

Many retirement housing projects are under construction or are on the planning boards throughout the United States. Musson and Heusinkveld (8) predicted in 1963 that 300,000 new dwelling units will be needed per year for the next fifteen years to house people sixty-five years of age and older. The United States Census Bureau predicted that 19.5 millions of Americans will be over sixty years of age in 1970, and in ten years this number will jump to 24.5 millions. Five per cent of these retired citizens will not live in their own homes (6).

Musson and Heusinkveld (8) determined that older people live in three types of retirement quarters. They suggested that these might be called protected living, independent living, and assisted living. They described protected living as that exemplified by nursing homes, hospitals, institutions for the physically disabled, and mental institutions. Independent living was typified by individual homes, duplexes, apartments of all kinds, hotels, and trailer parks. It should be noted, according to the authors, that two-thirds of the nation's older persons owned their own homes and eighty per cent of these homes were mortgage free (13). Muse (7) concluded from her study of Vermont senior citizens reported in 1965 that elderly couples who chose to live in their own homes were better housed than they would have been a few years ago. Independent living for the elderly was also provided by the federal government's Public Housing Administration, who reportedly had 200,000 units available in low rent projects (12).

Trailer parks in Arizona, California, Nevada, and Florida seemed to provide unique assisted living type housing for senior citizens. For example, in the year 1963, Bradenton, Florida, provided for 3,000 people with the Bradenton Trailer Park and the El Rancho Village trailer park. The average age of their residents was reported as being sixty-seven and one-half years. These trailer parks had public address emergency systems and other special features (8). Hillcrest Homes, Bozeman, Montana (8), was reported as an example of assisted living for more affluent senior citizens. Senior citizens who choose assisted living may choose from hotels for the elderly, motel conversions, and homes for the elderly. These homes may be sponsored by a private or public agency, church, or fraternal group (8). Cleveland's Metropolitan Housing Authority (2) was a pioneer in public assisted living type housing for the elderly when they planned their Golden Age Center in 1952. The Gideon Spieker Terrace (9) which opened in Toledo, Ohio, in 1958 was another pioneer in housing for the elderly.

Loup (5) pointed out that life in a home for the aged was at best a poor substitute for the kind of life these people had once experienced in the relationships of the family circle. She added, however, that thoughtful planning can make it a very rewarding substitute. Wolff (11) had observed that the most frequent precipitating factor causing emotional upsets in elderly people, upsets which often lead to hospitalization, was badly managed retirement. Donahue (3), an outstanding authority on aging, believed that the elderly who had the fewest adjustment problems are those who continued their education and who had a general concern for

humanity. She stated that a second important factor was that the elderly should have physical and mental activity of personal significance to them. Havighurst (4) further pointed out that retired people must work out a way of living that would fill their former working hours. He believed that education for responsible self-direction would fill this need. Housing for the elderly should be planned to meet their continuing needs in educational, cultural, and humanitarian pursuits.

It has long been the practice in planning dwellings for the elderly to build a facility and then fit the people to this building. The more ideal way would be to determine, as accurately as possible, the needs of the elderly and then build to suit these needs.

Taylor (9) stated several ways to collect data on the needs of the elderly. One of these was to ask the older people to describe their needs. This method was used in the study described in this thesis.

CHAPTER III

Design and Procedures of the Study

All the residents of Hillcrest Retirement Center who had lived there five months or more and who were in good health were interviewed to investigate the problem of how the physical plant facilities, the rooms and apartments, the entire building and the grounds, met the residents' physical, social and routine needs.

Source of Data

The people to be interviewed were selected by the Director of Hillcrest because of his first hand knowledge of the residents. The length of time the residents interviewed had lived in Hillcrest ranged from five months to three years. At the suggestion of the director, the interviewee had to live in Hillcrest at least five months to qualify for the study. He reported the residents, on an average, needed five months to adjust to a new living pattern. The residents had to be in relatively good health to be interviewed because some were too ill to be disturbed, some were mentally not able to cooperate and others had hearing difficulties. Of the forty people selected for interviews thirty-six were single; some were widows and widowers and some had never married. Five were men, thirty-five were women and four were married couples.

Thirty-seven of the forty people interviewed had worked at a career outside the home. Three of the thirty-five women had devoted their lives to full time homemaking. The majority of the interviewees had retired from careers in education. The professions of the minority varied from

careers in selling to government positions.

The average age of the residents interviewed was seventy-four years of age, and the majority were college graduates. The people interviewed averaged sixteen months in residence at Hillcrest. Five people had lived in apartments; the majority of the people participating in the study had lived in their own homes before coming to Hillcrest. The length of time they had lived in their prior residence ranged from twenty to eighty-six years, with the average length of time being forty and one-half years. Death of their spouse was reported as the main reason for moving to Hillcrest. All the interviewees responded that Montana was their home; the majority were from the western half of Montana.

Collection of Data

The data collecting instrument (Appendix III) was designed to first describe the interviewee, then to ascertain his statements about the Hillcrest facilities to determine how they met his needs and finally an open question enabled a free response on any aspect of retirement center living.

After the data collecting instrument was constructed and test practiced with several students the investigator contacted the Director of Hillcrest Retirement Center and scheduled an interview with him to discuss the value of the study to Hillcrest and others interested in planning housing for elderly persons. The Director gave his approval of the study and obtained the approval of the Hillcrest Board of Directors. The study and the interviewer were introduced by the administrator to the Hillcrest

residents and their cooperation was solicited. The Director of the School of Home Economics at Montana State University sent a letter (Appendix IV) to each resident who had been selected to be interviewed which further identified the investigator and the study.

Interviews were arranged at the convenience of the residents in their rooms or at a place they chose. The statements were recorded and then two copies of each interview were typed. Each typed answer to each question had a code number signifying who had made the statement and the number of the question the statement answered. Using one typed copy of each interview, the statements were cut apart and reassembled so that all answers to the same question were together.

The second copy of the interview was kept for a control and for quick reference.

Analysis of the Data

The responses of the data collecting instruments were assembled in twenty groupings that corresponded exactly with the questions that were asked. These findings then were studied and analyzed and a consensus was derived from the findings. A percentage was used at times to further explain the consensus.

CHAPTER IV

Results of the Study

Each interviewee was given a code number by the investigator to insure that the comments would be kept confidential and to encourage the interviewee to feel secure in answering questions as frankly as he wished.

All the residents interviewed, except three people, had brought all or part of their room furnishings with them. Two residents bought all new furnishings when they arrived at Hillcrest. After living in Hillcrest for some length of time, one resident sold the furniture she had brought from her previous home and bought all new furnishings. This was done because she felt her old furniture was too large for her room at Hillcrest. All the residents, except one, bought new draperies. Half of the people interviewed purchased a new bed; either a single bed or a bed that looked like a couch in which the back pulled down and provided shelves for the storage of bedding and pillows. All the people interviewed, with three exceptions, brought varying amounts of dishes and table linen. The majority stated they seldom used their dishes and never used their kitchen utensils.

Only one person interviewed wished that her room at Hillcrest provided space enough to have enabled her to have brought more furniture with her. All the remaining interviewees expressed satisfaction with the amount of things they had brought with them.

When questioned about the location of Hillcrest, all residents interviewed expressed deep appreciation for the mountain view their rooms and other parts of the building gave them. Sixty-one percent expressed the

opinion that the distance from town was ideal. The others would have preferred to be closer to Bozeman. Five people interviewed mentioned that because of Hillcrest's location winter winds were severe. Three people interviewed mentioned that the winds were severe in the summer because of the barren hillside location. One person interviewed had no opinion about the location.

All the interviewees liked the present design of Hillcrest. They all expressed pleasure with the fact that they were housed under one roof and not in separate buildings. Many residents mentioned their balcony and how much they enjoyed it because it gave them a feeling of freedom, a feeling of not being "hemmed" in.

Many of the residents mentioned how much they liked the elevators and that each room, therefore, was as convenient to the outdoors as a ground floor apartment.

Twenty per cent of the people interviewed mentioned that the roof had leaked and had to be replaced. The consensus was that if the roof had been designed with a steeper slope this would not have happened.

Some reported that because of the winter wind against the large windows their rooms were sometimes very cold.

The lounge, the Thursday night entertainment, and the Sunday night church services were the most frequently mentioned recreational facilities.

The lounge provided the latest magazines. Books, playing cards, games of Scrabble, Flinch, Chinese Checkers, Bingo, Dominos and puzzles were available. Talking to friends was a popular past time in the lounge.

The Thursday night entertainment in the lounge was varied. Movies, lectures and musical programs have been presented.

Ministers from different churches in Bozeman took turns in presenting Sunday evening services.

Walking was mentioned as a favorite recreation by forty and six tenths per cent of the people interviewed. Shuffleboard was the next most frequently mentioned facility with twenty-four per cent of the respondents; but used by less than eight per cent of the respondents. Three respondents reported that since the floor had been waxed, they were afraid to play.

The majority (fifty-two per cent) of those interviewed reported they had spent time reading every day.

Fraternal and professional groups had claimed the attention of thirteen and one-half per cent of the respondents.

Gardening, use of the greenhouse, sewing, and weaving were the least mentioned recreational activities.

Several of those interviewed expressed disappointment in the fact that there was a charge for the bridge lessons and the weaving lessons.

Only one respondent mentioned that he had used the billiard table.

Ceramics, once offered at Hillcrest, was not popular for two reasons. First, the ceramics required storage space or had to be given away. Second, the residents had given away many beautiful ceramic objects before they moved to Hillcrest for lack of space reasons.

Disappointment was expressed to the investigator that the horse shoe pitching equipment had never been installed.

The need for a recreation and social director was expressed.

The only suggestion for additional recreation or hobby facilities was made by one respondent who suggested a bowling alley.

The consensus was that the recreation and hobby facilities offered by Hillcrest were adequate and a high degree of satisfaction was expressed by the interviewees.

In addition to recreation activities respondents were questioned about who and how they entertained guests.

Twenty-six per cent of the respondents had sons or daughters living in Bozeman whom they had entertained.

Thirty and four tenths per cent of the interviewees answered that they had seldom or never entertained people and they did not have any close relatives in the vicinity of Bozeman.

In addition, only one respondent mentioned entertaining children under twelve years of age.

The most frequently mentioned method of entertaining was having guests for a meal in the Hillcrest dining room. All respondents agreed this was a very easy and pleasant way to entertain guests.

Thirteen per cent of the respondents thought entertaining guests by taking them to a meal at Hillcrest was too expensive for their incomes. To have one guest for meals cost \$1.00 for breakfast, \$1.25 for lunch, and \$2.00 for dinner. Besides guest facilities for meal time entertaining Hillcrest also has facilities for over night guests.

Four respondents mentioned entertaining guests with tea or coffee in the small lounges that are available in the east wing of the building. Extreme dissatisfaction was expressed with this means of entertaining

because the small preparation kitchen is at the opposite end of the hall. Transporting the food and dishes exhausted the hostesses. Two women and one man mentioned serving guests coffee and other refreshments in their own rooms.

In addition to entertaining, vacations also indicate the pattern life takes for Hillcrest residents. Fifty per cent of the respondents stated that they seldom or never took a vacation away from Hillcrest and those who took vacations away from Hillcrest did so in the summer. Twenty-six per cent of the residents who vacationed in the summer also mentioned leaving at Christmas time.

The majority of people interviewed lived in the \$9,000 and \$11,000 units which are a bedroom sitting room combination with a bath. When they were asked to make suggestions about the room, sixty-six per cent of the respondents had no suggestions, the remainder made the following suggestions. They are listed in the order of the frequency with which they were mentioned.

1. Noiseless toilets
2. More soundproofing of the rooms and apartments
3. A pull chain on the intercom so it could be reached
from the floor
4. An easy to reach electrical convenience outlet in the
bathroom
5. Round the corner of the counter near toilet
6. A grab bar by the toilet
7. A stronger clothes closet rod

8. Every wing in the building should have a lounge on each floor
9. Less window glare
10. Better individual control of heat and ventilation
11. Two respondents wished their rooms were larger

Storage was the next facet examined to determine how the resident had felt about his accommodations at Hillcrest. Seventy-three per cent of the respondents reported they had felt that the storage their room provided was adequate. The others reported they needed more storage space for clothes, shoes and bedding and in that order. All respondents agreed the extra individual storage space provided for them in the basement was adequate.

Next, the residents were questioned about how the Hillcrest facility added to their feelings of safety, security, and well being. All the respondents mentioned the following safe guards had made a great contribution to their feeling of protection.

1. The intercom system
2. The twenty-four hour nursing care
3. The secure method of locking the building
4. The meal time check to see that all residents were present.

The fire escape, fire doors and fire alarms were well planned. Fear of not being able to hear the alarm was expressed. Fire drills and alarm checks were recommended by the residents.

Fear of intruders was not reported. Residents keep the doors lock to their rooms most of the time.

During the course of the study the maintenance fee to each resident was raised. A marked effect on feelings of security was reported by all interviewees. The reactions ranged from mild concern to complete despair.

Some respondents reported a feeling of security in the fact that Hillcrest was backed by the Methodist Deaconess Foundation.

Four respondents reported feelings of security because they felt sure they would never be a burden to their families.

Three people reported having guests announced to them from the main desk which gave them a feeling of security.

When they were asked to make suggestions and comments about the grounds, patio and building exterior, thirty-nine per cent of the respondents had no suggestions.

The suggestions that were given are listed in the order of the frequency with which they were mentioned.

1. Fountains are a useless expense
2. Better places to walk, with benches placed near the walks
3. Wind protection for the individual balconies and the patio
4. Tables, comfortable chairs and umbrellas for the patio

Next, the interviewees were questioned about the time of year they most enjoyed living in Hillcrest.

Fifty-two per cent of the respondents stated that they had no preference. Seventeen per cent of the residents preferred living in Hillcrest in the summer time and eighteen per cent of the residents preferred fall. Winter was preferred by thirteen per cent of the respondents. Respondents who answered that they preferred the warmer months stated they enjoyed

being outside. On the other hand, reasons for preferring the winter months varied. One respondent answered there were more activities at Hillcrest in the winter. Another enjoyed winter because it was such a pleasure not to shovel snow or operate a furnace.

When questioned as to their suggestions for improvements, the respondents gave the following compilation:

1. Newcomers should be instructed on what to do with waste paper, laundry and garbage. They should be shown how to operate the windows. The incinerator receptacles in all parts of the building are taped shut because they do not function. Garbage cans are stationed in the halls. These cans in one wing have to be wheeled through the lounge to be emptied; if the basements adjoined with a hall this would not be necessary.
2. Tooth paste, stationary, stamps, candy, and other items could be available for sale in the building.
3. A comment frequently made by the residents was that they did not feel regimented and they appreciated this very much.
4. The lighting fixtures in the lounge were too high in the ceiling to be used for reading and it was hard to see well enough to play cards. The lamps that were in the lounge should be replaced.
5. The main entrance side walk was heated but in the winter when the wind blew water from the fountain onto the walk it was wet and the area was covered with icicles and though not ice covered it was slippery. When the wind blew the

entrance was very uncomfortable and people got cold water blown on them from the fountains.

6. The fountain was expensive as far as heating and pumping the water. Because the maintenance men shoveled snow from that area into the fountain, an added expenditure was involved in melting the snow.
7. The uninsulated garages are kept at 70 degrees. A lower temperature and an automatic control was advised. The heavy duty wiring that was installed to facilitate auto repair has not been used. Water for washing a car or just a windshield would be convenient.
8. The bathroom linoleum could have been selected to match the bedroom-sitting room more attractively.
9. Only one person interviewed wished she had moved in at an earlier age. The consensus was that older people should stay in their own homes as long as possible.
10. The consensus of the interviewees was that retirement center living filled a real need and could be the most satisfactory way of life for older people.

CHAPTER V

Summary, Conclusions and Recommendations

Summary

The purpose of this study was to investigate how the physical plant facilities, the rooms and apartments, the entire building, and the grounds met the personal, social, and routine needs of forty selected residents of Hillcrest Retirement Center in Bozeman, Montana. Structured interviews with each resident who had lived in Hillcrest five months or more and who were in good health were conducted at the time and place selected by the interviewee.

The reader must be cautioned when reviewing the findings of this study that the residents who were ill or on vacation were not interviewed. It should also be noted that information was collected only once, thus no opportunity to check consistency of responses was presented. A second interview may, of course, yielded different reactions to the questions asked.

Another factor should be noted as well, during the course of this study the monthly maintenance fee which the residents of Hillcrest paid was raised to \$150 a month for the Arcadia unit, \$160 a month for the Belmont unit, \$170 for the Crestview unit, \$195 for the Dunhaven unit, and \$250 for the Esterbrook unit for a single person from a rate of \$125 a month for a single person in each of the units. The new fee, it was noted, was not the same for all residents, but was increased in ratio to the room or apartment size. The interviewees seemed initially to be very upset by this raise in fees.

Conclusions

The conclusions that follow seem warranted in the light of the findings of this study:

1. Living in a retirement center such as Hillcrest was not an inexpensive way to retire. Besides the monthly maintenance fees costs of newspapers and other reading material, recreation expenses involving trips, plays, concerts, movies, taxis, toiletries and notions, telephone, and clothing added additional financial concern. The residents, it was observed, maintained a high standard of dress. The women wore street clothes with hoisery and jewelry at all times; while the men wore shirts and ties. All the residents obtained some new furnishings upon moving into Hillcrest which was another expense.
2. Retirement center living might be the most effective way of solving housing problems of elderly people; but that this step perhaps should not be made until it was necessary.
3. The grounds of Hillcrest Retirement were found to be very satisfying to the residents but they suggested the grounds could be more functional with walks and paths laid out on the grounds with benches nearby. The fountain, because of the wind, made an unpleasant entrance to the building in the winter time. The water blew on the pedestrians and formed icicles on the roof over the walk way and on other objects in that area. The walk from the parking lot to the building seemed most unpleasant in the winter. Patio furniture and wind breaks

would make more outdoor living possible in the summer.

4. The building as a whole was found very satisfactory by the residents of Hillcrest who suggested only such improvements as better lighting in the main lounge, wind protection for the balconies, and better soundproofing between the rooms and apartments. The garbage cans placed in the halls were unsightly and a better method of garbage removal was recommended.
5. The private living area provided for the residents was concluded to be most satisfactory with small improvements such as a grab bar by the toilet, noiseless plumbing, and some way to reach the intercom from the floor as the major improvements suggested. Better color combinations, some ways of camouflaging cement blocks, and difficulty in keeping warm on a windy day were mentioned but not frequently. The size of the accommodations provided and the storage could be concluded to be satisfactory.

The use of the space for weaving and sewing seemed unjustified in terms of its cost. The area for shuffleboard was not often used nor was the television room or billiard table. A careful study of recreation activities of the residents might, perhaps, have saved building expense.

Recommendations

Recommendations for further study in view of the findings of this

investigation are:

1. A more intensive study of recreation activities of the retired elderly living at Hillcrest would be useful to all builders of retirement centers.
2. A study of the relationship of the Hillcrest residents to the administrators was an area which seemed to need a great deal of further study because of the administrator's unique position of parent substitute. This role appeared to be thrust on him by some residents.
3. It is further recommended that a study be made of methods by which retired elderly citizens can obtain authoritative and useful financial advice.

APPENDIX

APPENDIX I. CONTRACTS.

AGREEMENT FOR ADMISSION TO HILLCREST HOMES

THIS AGREEMENT, Made and entered into by and between BOZEMAN DEACONESS FOUNDATION, a Montana non-profit corporation, of Bozeman, Montana, First Party, and _____ of _____, Second Party,

WITNESSETH:

WHEREAS, First Party is engaged in a project of providing retirement homes for residential occupancy under the name of Hillcrest Homes at Bozeman, Montana, and

WHEREAS, Second Party is with this Agreement making application and reservation for such occupancy, and is, with this agreement submitting personal data to First Party to induce its approval, and

WHEREAS, When this Agreement is signed by Second Party and by the authorized representative of First Party, then this Agreement, and all of its terms shall be fully binding on both Parties,

NOW, THEREFORE, It is mutually agreed:

1. Second Party agrees to pay for such occupancy the sum of money as set forth in the endorsement attached hereto and by reference made a part hereof.
2. First Party agrees to provide and hereby reserves unto Second Party that type of residence as set forth in said endorsement above referred to for occupancy at the time stated therein.
3. First Party agrees to provide such occupancy for the lifetime of Second Party, subject to the provisions herein set forth.
4. Second Party agrees to abide by the rules of conduct governing Hillcrest Homes as adopted from time to time by First Party.
5. The First SIX (6) MONTHS of residence at Hillcrest Homes shall be deemed as "adjustment period"; during said "adjustment period" either Party may, at its option, terminate this Agreement by serving THIRTY (30) DAYS NOTICE in writing, and upon said termination First Party shall refund the occupancy fee, as such fee is defined in the endorsement attached hereto, paid less THREE PERCENT (3%) of the total occupancy fee agreed to be paid plus one-half of one percent of the total occupancy fee per month to be deducted in refunding of said fee.
6. After the expiration of the aforementioned six months "adjustment period," and during his or her lifetime, the Second Party shall have the right at any time, except during illness, to terminate this Agreement by

giving SIXTY (60) DAYS NOTICE in writing of intention so to do, and said Agreement shall terminate at the end of said Sixty Day Period. Likewise, the First Party shall have the right to terminate this Agreement by giving SIXTY (60) DAYS written NOTICE in case Second Party does not comply with the provisions of Paragraph 4 of this Agreement. In the event this Agreement is terminated by either of the Parties hereto in accordance with the above provisions, First Party agrees to dispose of the living unit concerned and to reimburse Second Party for the unearned portion of the amount paid for the living unit according to the following plan:

The amount "earned" by Hillcrest Homes for each month of residence shall be determined by dividing the amount paid or to be paid as the occupancy fee by the number of months of life expectancy of Second Party at the time of moving into Hillcrest Homes according to legally recognized mortality tables, then multiply the product by the months of residence. First Party will then endeavor promptly to dispose of the living unit to another, and from the proceeds received from such other, will refund to Second Party the unearned portion of the occupancy fee. Should First Party, because of economic conditions, be unable to discover a suitable party willing and able to pay the full amount of the established fee for the living unit, the Parties may agree in writing upon a lesser sum as the occupancy fee of the successor occupant of the living unit, in which case the proportionate fee returned to Second Party shall be based upon the amount paid by the successor occupant rather than that originally agreed upon.

7. Second Party has the right to cancel this Agreement at any time prior to moving into Hillcrest Homes in which case First Party will endeavor promptly to dispose of the living unit covered by this Agreement, and with the proceeds will refund to Second Party the amount paid less THREE PERCENT (3%) of the total agreed fee. In the event of the death of Second Party before taking up residence at Hillcrest Homes, First Party will endeavor promptly to dispose of the living unit to another, and with the proceeds will refund to the Estate of First Party the amount paid, less THREE PERCENT (3%) of the total agreed fee.

8. In the event a living unit is not available for the use of Second Party within the time set forth in the endorsement, First Party at its option, may refund to Second Party all fees paid hereunder in the manner provided in Paragraph numbered 6, or shall pay to Second Party an amount of \$ _____ per month until Second Party's living unit is ready for occupancy.

9. Subordination to Federal Housing Administration Loan: Second Party specifically understands and agrees that First Party has borrowed money for the construction of Hillcrest Homes facilities and has given a mortgage to secure such sums of money borrowed and that said loan has been insured by the Federal Housing Commissioner, and that any rights, privileges and benefits arising from the payment of any founders or membership fee and any rights, privileges and benefits arising from said payment are hereby expressly made subordinate and inferior to any mortgage or deed of trust on

the premises of First Party heretofore or hereafter given to secure the repayment of such mortgage loans or advances, and to the accompanying documents, including a regulatory agreement with the Federal Housing Commissioner, executed by the said First Party, and to any and all modifications, extensions and renewals thereof, and to any mortgage or deed of trust and accompanying documents made in replacement thereof. Second Party hereby agrees together with First Party to execute upon request any instrument that the mortgage holder, or any lender, may deem necessary or desirable to effect the subordination of this Agreement to any such mortgage or deed of trust. Both Parties mutually agree to expressly waive any and all notices of default and notices of foreclosure of said mortgage or deed of trust which may be required by law. Both Parties do hereby constitute SECURITY BANK & TRUST COMPANY OF BOZEMAN, Bozeman, Montana, his or its agent to receive and accept such notices on their behalf.

10. This Agreement and Endorsement attached hereto contain the entire Agreement between the Parties hereto; this Agreement and Endorsement shall not be changed except by written agreement signed by both Parties and attached hereto; no assignment shall be made without written consent of First Party; this Agreement shall fully terminate upon the death of Second Party.

11. In the event that there are two persons or more of Second Party, and this Agreement shall be terminated for any cause as to one of them, then the remaining party may continue in occupancy subject to terms of attached endorsement.

12. It is mutually agreed that time is of the essence of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement, First Party by its duly authorized officers or representatives on the dates and place set opposite the respective signatures.

BOZEMAN DEACONESS FOUNDATION

By _____	_____
First Party	Second Party
Date _____	Date _____
Place _____	Place _____

Receipt of this Agreement signed by Second Party and \$ _____
to apply on Fee is hereby acknowledged this _____ day of _____
_____, 196__.

HILLCREST HOMES

By _____
Administrator

LUMP SUM PAYMENT FOR LIFE

ENDORSEMENT PLAN I

THIS ENDORSEMENT is attached to and made a part of the Agreement dated the _____ day of _____, 19____, between First Party and Second Party.

IN CONSIDERATION of the mutual covenants contained herein and in the Agreement signed by the Parties hereto, IT IS AGREED AS FOLLOWS TO-WIT:

1. DEFINITIONS:

(a) "Occupancy Fee": As used herein Occupancy Fee shall mean a fee charged for occupancy only, in Hillcrest Homes, and the same shall be exclusive of the charge made for board, services and like items.

(b) "Care Charge": Cost of living in Hillcrest Homes is separate and in addition to all amounts hereinbefore paid. As used herein "Care Charge" shall mean a monthly charge for food, heat, utilities, room cleaning, linen and linen laundry, and general care in the Health Unit.

2. Second Party agrees to pay to First Party for the residence facility, hereinafter described, the occupancy fee in the amount of \$ _____ payable as follows:

(a) \$ _____ upon signing of this Agreement by Second Party, receipt whereof is hereby acknowledged by First Party.

(b) The sum of \$ _____ within thirty (30) days after occupancy of the residence has been made available to Second Party, or, in the alternative the following arrangements:

3. The above payment shall include both occupancy fee and care charge.

4. That in the event the Second Party becomes so ill as to require special attention, then he or she or both may be moved to the Health Unit at the discretion of the management of Hillcrest Homes. The Health Unit is a separate facility at Hillcrest Homes and does not contemplate either hospital facilities of First Party or medical care, except as hereinafter provided. Second Party, under this Endorsement, is entitled to care in the Health Unit without additional charge.

A professional registered nurse shall be in charge of the Health Unit.

First Party will furnish all medicine necessary for the Second Party while Second Party is residing in the Health Unit.

The cost of physician, medicines, surgery, hospitalization, or for any special duty nursing care for his or her health and welfare shall be paid by him or her, except as herein provided.

Should he or she at any time become incapacitated, Hillcrest Homes management shall have the right to assign him or her to accommodations which welfare and safety may require, as determined by said management.

In the event the Administrator of Hillcrest Homes should determine after consultation with Second Party's physician, that Second Party's health and welfare require Second Party to be permanently moved to the Health Unit or other accommodations, the living unit assigned to said Second Party may at the option of the Administrator be assigned to some other member; and that in the event Second Party is moved permanently to the said other accommodations, Hillcrest Homes shall provide adequate storage facilities for Second Party's personal belongings and furniture.

5. Second Party shall be provided occupancy in that certain residence described as _____

_____ on the floor plan of Hillcrest Homes, copy of which has been delivered to Second Party. Occupancy of said residence shall be pro-

vided by Second Party not later than _____
Second Party shall provide all furniture and furnishings, except carpeting and linens.

6. In the event that this Agreement shall be fully terminated for any cause, and if there remains any property of Second Party undisposed of, then First Party shall notify by letter mailed to Second Party or to any relative or other person whose name has been filed with First Party, or, if no name has been filed, then by letter to the public administrator of Gallatin County, Montana, describing the property, and if such property be not removed within a period of six (6) months after such mailing, then such property shall belong to First Party and First Party shall be entitled

to keep or dispose of it in any manner as it shall determine.

7. Additional provisions as agreed between the parties are as follows:

LUMP SUM ACCOMMODATION FEE AND MONTHLY PAY

ENDORSEMENT PLAN II

THIS ENDORSEMENT is attached to and made a part of the Agreement dated _____, 19____, between First Party and Second Party.

IN CONSIDERATION of the mutual covenants contained herein and in the Agreement signed by the Parties hereto, IT IS AGREED AS FOLLOWS TO-WIT:

1. DEFINITIONS:

(2) "Occupancy Fee": As used herein, occupancy fee shall mean a fee charged for occupancy only, in Hillcrest Homes, at the time of acceptance by First Party, and the same shall be exclusive of the charge made for board, services and like items.

(b) "Care Charge": Cost of living in Hillcrest Homes is separate and in addition to all amounts hereinbefore paid. As used herein "Care Charge" shall mean a monthly charge for food, heat, utilities, room cleaning, linen and linen laundry, and general care in the Health Unit. Rates are computed upon actual costs, and may be increased or decreased with changes in the cost-of-living.

2. Second Party agrees to pay to First Party for the residence facility, hereinafter described, the occupancy fee in the amount of \$ _____ payable as follows:

(a) \$ _____ upon signing of this Agreement by Second Party, receipt whereof is hereby acknowledged by First Party.

(b) The sum of \$ _____ within thirty (30) days after occupancy of the residence has been made available to Second Party, or in the alternative the following arrangements:

3. Second Party shall pay his or her Care Charge by the payment to Hillcrest Homes of the sum of \$ _____ per month for each and every month of residence, payable in advance and on or before the 5th day

of each month, subject to revision as hereinafter set forth.

4. Second Party shall be entitled to THIRTY (30) DAYS free care in the Health Unit for each and every year, but shall not be allowed to accumulate Health Unit care from year to year;

If more than thirty (30) days Health Unit care is required, a charge of TWO DOLLARS (\$2.00) per day shall be added to Second Party's Care Charge for the use of the services of the Health Unit.

If Second Party should at any time become incapacitated, Hillcrest Homes by action of its Administrator shall have the right to assign Second Party to accommodations which welfare and safety require.

A professional registered nurse shall be in charge of the Health Unit.

In the event the Administrator of Hillcrest Homes should determine after consulting Second Party's medical doctor, if any, otherwise a medical doctor licensed under Montana law, that Second Party should be permanently moved to other accommodations, the living unit of Second Party may at the option of said Administrator be transferred to some other person, and in such event First Party shall provide adequate storage facilities for Second Party's personal belongings and furniture.

5. The monthly Care Charge shall be based on cost of operation computed in Paragraph 1 (b) and, therefore, may be raised or lowered at option of First Party upon thirty (30) days notice.

If during the running of the Agreement, Second Party should desire to temporarily reside elsewhere, then credit of THIRTY (30) DOLLARS per month of the Care Charge shall be given for each and every month, provided the balance of the Care Charge is paid within the time as hereinabove provided, and providing Second Party reside elsewhere for a period of one month or more.

6. Second Party shall be provided occupancy in that certain residence described as _____

_____ on the floor plan of Hillcrest Homes, copy of which has been delivered to Second Party. Occupancy of said residence shall be provided

by Second Party not later than _____.

7. In the event that this Agreement shall be fully terminated for any cause, and if there remains any property of Second Party undisposed of, then First Party shall notify by letter mailed to Second Party or to any relative or other person whose name has been filed with First Party, or if no name has been filed, then by letter to the public administrator of

Gallatin County, Montana, describing the property, and if such property be not removed within a period of six (6) months after such mailing, then such property shall belong to First Party and First Party shall be entitled to keep or dispose of it in any manner as it shall determine.

8. Additional provisions as agreed between the parties are as follows:

ENDORSEMENT PLAN III

THIS ENDORSEMENT is attached to and made a part of the Agreement dated _____ between First Party and Second Party.

IN CONSIDERATION of the mutual covenants contained herein and in the Agreement signed by the Parties hereto, IT IS AGREED AS FOLLOWS TO-WIT:

A. Definitions:

1. "Occupancy Fees": As used herein, occupancy fee shall mean a fee charged for occupancy only, in Hillcrest Homes, and the same shall be exclusive of the charge made for board, services and like items.

2. "Care Charge": Cost of living in Hillcrest Homes is separate and in addition to all amounts hereinbefore paid. As used herein "Care Charge" shall mean a monthly charge for food, heat, utilities, room cleaning, linen and linen laundry.

B. It is agreed that the fee and care charge shall be paid in monthly installments, which shall be computed upon the following basis:

Installment on occupancy fee.....	\$ _____
Care Charge.....	\$ _____
Total monthly payment.....	\$ _____

It is further understood that such payment will be made in advance on or before the fifth (5th) day of each month without demand; that should the Second Party fail to make such payment, then First Party shall be entitled to immediate possession of the living unit, and Second Party agrees to immediately leave the premises and hereby waive all notices required by the law of Montana and any holding-over of the living unit beyond that time shall constitute an unlawful detainer as provided by Montana law.

C. Under this plan, Health Unit facilities will be provided upon payment of such additional charges as First Party shall determine.

D. It is understood that monthly care charge is based on the cost of operation, therefore, it is further agreed that the monthly care charge herein specified may be raised or lowered at the discretion of First Party's Board of Directors.

E. In the event that this Agreement shall be fully terminated for any cause, and if there remains any property of Second Party undisposed of,

then First Party shall notify by letter mailed to Second Party or to any relative or other person whose name has been filed with First Party, or, if no name has been filed, then by letter to the public administrator of Gallatin County, Montana, describing the property, and if such property be not removed within a period of six (6) months after such mailing, then such property shall belong to First Party and First Party shall be entitled to keep or dispose of it in any manner as it shall determine.

F. Additional provisions as agreed between the parties are as follows:

APPENDIX II
Drawings of Rooms

