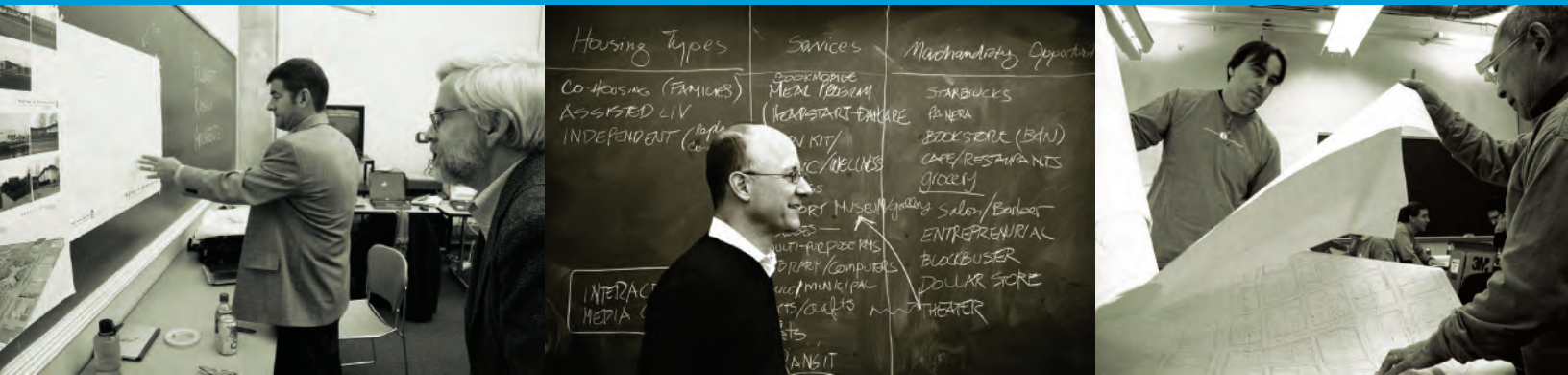


# The UW–Milwaukee Aging in Community Senior Housing Ideas Competition: From Concept to Reality



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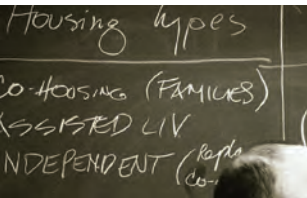
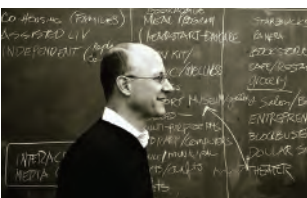
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# I. The Ideas Competition...

## From Concept to Reality

# Introduction



Milwaukee, like the rest of our nation, is aging. By 2030, one in five Americans will be 65 or older. We will not only need new housing for older persons but also new ideas for senior housing. In response, the University of Wisconsin Milwaukee (UWM) sponsored an ideas competition to heighten Milwaukee's awareness of the need for additional and more innovative senior housing. The ultimate goal of the competition was to encourage development of senior housing by local, civic, religious, and fraternal organizations.

The results of the ideas competition can be reviewed in the companion piece, *Aging in Community: A Senior Housing Ideas Competition*. This whitepaper is available for free download at: [www.uwm.edu/Dept/IAE/pdf/Aging in Community Booklet 202007.pdf](http://www.uwm.edu/Dept/IAE/pdf/Aging%20in%20Community%20Booklet%20202007.pdf).

Glossy, hard copies—offered free of charge—may be ordered by calling 414.229.2991.

In the present white paper, we address how the competition came to be. Developing and implementing any conference can be a daunting experience. This was especially true in the senior housing ideas competition, where the program team faced myriad challenges. Some of these we met head on with great success; others, less so. The purpose of this paper is to outline some of the “how tos” of setting up a design competition so others can:

- Profit from our knowledge
- Build on our experiences
- Develop their own competitions
- Help move the field forward.

# When, why, and how was the competition conceived?

The genesis of the housing competition began in February, 2006. At that time, Sarah Dean, a Milwaukee-based advocate for seniors and then Executive Director of the *Faye McBeath Foundation* ([www.fayemcbeath.org](http://www.fayemcbeath.org)), learned that a local Catholic parish had some land which they owned, but wished to sell. A criterion for purchasing the land was that the buyer (or someone linked to the buyer) must build housing on it geared to the needs of seniors. But who had the training and expertise in architectural design for seniors, and connections with local agencies to get such an ambitious project moving?

Jerry Weisman, Ph.D. is a Professor of Architecture in the School of Architecture and Urban Planning (SARUP) at the University of Wisconsin–Milwaukee. Weisman is a noted expert in how to create facilities that are responsive to the unique needs of older adults. With 25 years of experience in the field, Weisman was a logical choice to sow the seeds of the project. When asked if he might be interested in participating, Weisman not only liked the idea, he embraced it wholeheartedly and agreed to serve as “point person” on the project. At this moment, a number of critical processes began to unfold, including:

- Doing background research and generating broad ideas
- Modifying the original seed concept (i.e., creating an ideas competition)
- Searching for funding to support the project
- Cultivating relationships with local citizens and architectural firms
- Finding experts, guest speakers, and a location for the competition
- Implementing the competition



## Background research: Learning about senior housing, and generating broad, creative ideas

Where to even begin? The Milwaukee Ideas Competition needed a framework to determine what the participants wanted to accomplish. *They needed to do some research, define the context, and generate broad, creative ideas.*

It became clear, very early in the project, that examining concepts of senior housing elsewhere would be a pre-requisite to local planning. Thus, in February, 2004, a team of Milwaukee-based advocates for seniors—including members from *The Greater Milwaukee Foundation* ([www.greatermilwaukeefoundation.org](http://www.greatermilwaukeefoundation.org)), *The Faye McBeath Foundation*, *The Helen Bader Foundation* ([www.hbf.org](http://www.hbf.org)), the *Milwaukee County Department on Aging* ([www.county.milwaukee.gov/Aging7705.htm](http://www.county.milwaukee.gov/Aging7705.htm)), a local developer, and a Madison, WI-based banker—booked flights to Europe to examine senior housing there. The concepts of senior cohousing and cooperatives were, and still are, more widely developed and used in Scandinavian countries and the Netherlands than in the U.S., and so Amsterdam, and sites in Sweden and Denmark seemed logical places to visit. The team spent two weeks in Europe, gathering information, examining existing housing sites, and thinking about how to apply what they had learned in America. The trip was funded by the *German Marshall Fund* in Washington D.C. ([www.gmfus.org/template/index.cfm](http://www.gmfus.org/template/index.cfm)), because of their stated interest in strengthening transatlantic cooperation in many diverse spheres of interest.



# Modifications of the original seed concept

The “Europe team” brought their observations and ideas back to Weisman. In considering them, Weisman recognized that the development of innovations in senior housing—truly new ideas that were ground-breaking and forward-thinking—would require the pooled resources of many different architects. Further, designing for one site alone would be insufficient. How could one hope to attract the interest of local architectural firms if they were simply being asked to generate an idea for one site that others were also examining? If the firms were all designing for one small space, the ideas would also be “small.” So, to produce artistic tension, creative competition, and new ideas, *multiple sites* would be required to take the concept of senior housing to a new level. And with that decision, the design competition for senior housing was born.

## Housing ideas competition becomes a “design *charrette*”

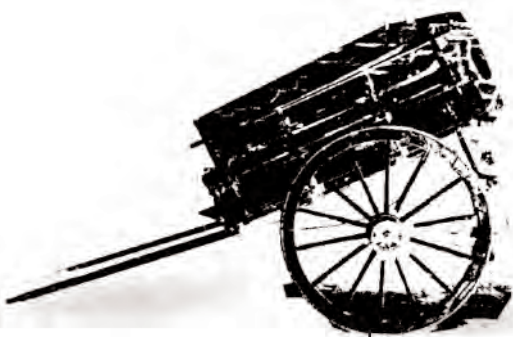
The French word, *charrette* literally means cart, but is often used to describe the final, intense work effort expended by art and architecture students to meet a project deadline. This use of the term is said to originate from the *École des Beaux Arts* in Paris during the 19th century, where proctors circulated a cart, or *charrette*, to collect final drawings while students frantically put finishing touches on their work.

As Weisman and his team developed their project, they started to use the terms *charrette* and *housing competition* interchangeably, and with increasing frequency. They wanted to convey their goal of bringing together teams of artists who would, over a brief period, give it their all to make strides in the way we think about the problems of senior housing, and how to address those problems with workable architectural solutions.

According to Bob Greenstreet, Dean of UWM’s School of Architecture and Urban Planning, “The term *charrette* is in the soul of every architect. Imagine the scene. There is a room—an architectural studio—with tables, drawings, candle light. And there are architecture students, all working on projects with great intensity and a singular devotion. And of course, they have started late and are finishing only just on the deadline.

So a big wooden cart, known as a *charrette*, is being pushed around the studio at a fast pace. And the students put their drawings on it so the plans can be carted off for review. Tradition has it that the students sometimes jumped on the *charrette* as it was pushed by, so they could keep scribbling up to the last minute!

Today, architects have moved away from this tradition, but the term *charrette* is still used in professional parlance to denote a concentrated burst of intellectual and creative energy focused on a particular design for a short period of time. During that time, the architects think about nothing else. They forego everything and are completely focused on the process of design.”



## Finding sources of funding

Any large project—such as the design competition—needs funding to make it happen. The *charrette* clearly showed that funders were very willing to step up to the plate, but this involved a great deal of networking and trust-building beforehand. Most important in securing funding was the fact that Weisman, in his many years in Milwaukee, had strong personal connections with architectural firms, agencies, philanthropists, friends, and colleagues, all who were willing to support the design *charrette*. Of course, these relationships are cultivated over years. Thus, in planning a design competition, it may be vital to have a “face” on the team that is recognized in the community; trusted; liked; and who has the political savvy to encourage people to give to a cause that could help thousands.

Indeed, the competition events demonstrated the years of positive collaborations between Weisman and local architects; it represented a public-private partnership of impressive proportions. The list of community agencies and programs that were involved in the process are:

- The Milwaukee Foundation
- The United Way of Greater Milwaukee
- The Helen Bader Foundation
- The Faye McBeath Foundation
- The Milwaukee County Department on Aging
- The Milwaukee Department of City Development

On the university side:

- Campus Design Solutions
- The Center on Age & Community
- The Institute on Aging and Environment

## Some “key players”...



The design *charrette* concept was conceived of, nourished, and supported in a variety of ways. Planning, execution, financial support, and trouble-shooting strategies were consistently offered by many people in Milwaukee’s network of aging agencies. Key among these figures were the following:



Weisman (left), Gelzer and two guests.

**Scott Gelzer**, Executive Director of the *Faye McBeath Foundation*. E-mail: [info@fayemcbeath.org](mailto:info@fayemcbeath.org); phone: 414.272.2626.

Gelzer has had a strong interest in senior housing needs, from the inception of the competition to today. He is a strong advocate for programs that address the needs of adults as they advance in age. Gelzer’s interests in the project were significant; through the generous support of the *Faye McBeath Foundation*, he continues to act as a positive force in the field of housing for seniors.



Helen Ramon

**Helen Ramon**, Program Officer at the *Helen Bader Foundation*. E-mail: [hramon@hbf.org](mailto:hramon@hbf.org); phone: 414.224.6464.

Ramon is the Program Officer for the *Helen Bader Foundation’s* Alzheimer’s Disease and Dementia program area. She works to further the Foundation’s \$1.8 million in Alzheimer’s grants per year, collaborating with partner organizations on issues affecting older adults and their families. She presents recommendations to the Foundation board on potential grants to programs relating to older health care, training, applied research, and public policy education.



Sarah Dean (right)

**Sarah Dean**, Milwaukee-based advocate for seniors, and former Executive Director of the *Faye McBeath Foundation*. E-mail: [sdean7@wi.rr.com](mailto:sdean7@wi.rr.com).

Dean, through her years at the *Faye McBeath Foundation*, has a wealth of experience in promoting programs that will have maximum impact for seniors. She is one of the most creative forces for change in Milwaukee. Her links to other organizations, thoughtful suggestions, and working knowledge of Milwaukee’s aging network—as well as other organizations across the U.S.—were invaluable to making the *charrette* a reality.

**Gerald Weisman, Ph. D.**, Professor of Architecture, School of Architecture and Urban Planning, UWM. E-mail: [gweisman@uwm.edu](mailto:gweisman@uwm.edu); phone: 414.229.3815.

Weisman has had an interest in senior housing since his days as a graduate student. He was looked to by many as the major “point person,” on the project, planning, serving as organizer, networking specialist, and idea person.

**Mark Proffitt**, doctoral student, School of Architecture and Urban Design, UWM. E-mail: [proffit2@uwm.edu](mailto:proffit2@uwm.edu); phone: 414-229-2991.



Mark Proffitt

Proffitt has over 14 years of experience in senior living design and consulting firms. His research and publications focus on creating successful dementia care settings and the impact of wellness philosophies on senior living communities. On the design *charrette*, Proffitt was central in coordinating every aspect of the competition, serving as a project manager and program coordinator, as well as “idea person,” under the supervision of both Weisman and Gelzer.

## From a general concept to “focused” ideas

It was always a goal of the *charrette* team to have community members be an integral part of this competition. After all, the results were intended to better serve the aging population in *their* neighborhoods. Thus, interest by local residents was deemed essential. Moreover, the team needed to know what local seniors and constituents thought would be important in the design of these forward-looking facilities for elders.

Project members held focus groups to better understand the concerns of local community members:

- Because it was anticipated that each respective neighborhood would have different needs, focus groups were planned for each respective neighborhood.
- Mailings were sent to people in their respective neighborhoods, describing early conceptions of the project, and inviting participation in small town meetings (i.e., the focus groups).
- Neighborhood groups were strongly encouraged to come to the sessions.
- The architectural firms, who were invited to participate in the *charrette*, sent representatives.
- Trained facilitators—who are critical to the successful functioning of focus groups—ran the meetings.
- All of the participants in focus groups were told that this design competition was to serve as a “brain storming” activity, that actual buildings would *not* result from the *charrette* experience—at least not in the immediate future. The *charrette* team emphasized this point to head off angry feelings if actual buildings did not get constructed.
- The focus groups represented a mix of private citizens, older and middle-aged adults, and interested professionals.

What was the most important thing that emerged from the focus group discussions? The fact that the architects actually *listened* to what the local citizens had to say, and digested their ideas, was critical. Later, when the time came to present their architectural solutions, the architects actually quoted some of the focus group members to reinforce the idea that their wishes and ideas were heard, and that these elements were incorporated into the various designs. This proved to be an extremely important way of empowering the communities.



## Uniqueness of the project; intersection of concerns and agendas

The Milwaukee *charrette* was a unique competition because there were eight architectural teams involved in the project that were local to the area. These teams all agreed to donate their weekends (a very generous contribution of time, money, and resources) to spend their time focusing on housing for seniors, and what that should look like in the future.

This aspect was particularly interesting because, usually, a *charrette* tends to be a very private concern. But here, there was transparency. The *charrette* was open to the public, quite literally. Outsiders were invited to come to the University to actually watch the teams work—stand over their shoulders for a bit—and even share their ideas as lay persons. Visitors could see what the architects were doing, listen to their discussion, their efforts at problem-solving, and then participate, at least at some level.



## Architectural firms: Getting their “buy-in”

Most of the local architectural firms invited to participate in the *charrette* did so with great willingness and enthusiasm. We attribute this to several factors:

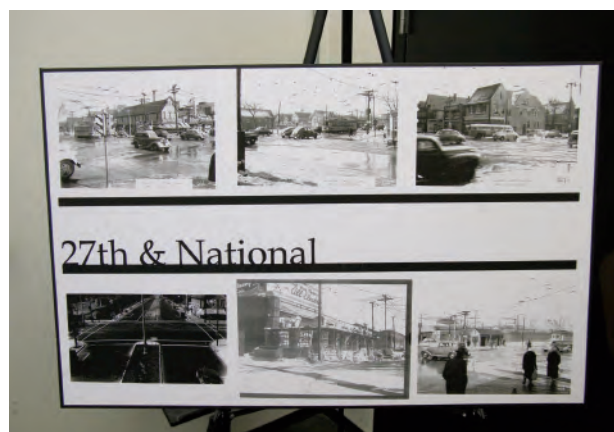
- Since Weisman has had a long career at UWM, and has a reputation as a national leader in architectural design for the elderly, local firms were eager to work with him. The personal connection between Weisman and the local architectural firms was perhaps the most important component of getting “buy in” with these groups. Indeed, many of the firms had architects who had been Weisman’s former students at UWM.
- Participating in the *charrette* provided architectural firms a tremendous opportunity for publicity and PR exposure.
  - The firms’ names were listed on some of the funders’ websites.
  - Their names appeared in the Design *Charrette* booklet that is a companion piece to this white paper.
  - There were two follow-up luncheons when networking among professionals occurred, offering more opportunities for firms to get community exposure.
  - Local newspaper articles mentioned participating architectural firms in their stories about the competition.
  - The week’s plenary speaker, William Thomas, M.D., is nationally known. His talk attracted some 600 people from the community, offering even more chances for interested professionals to learn about local architectural firms.
- During the actual design competition, UWM students worked alongside members of the participating architectural teams. This provided benefit to both students and the firms. Since the competition occurred on the UWM campus, the students helped the architects become familiar with on-campus design equipment (e.g., computers and software). The working relationships were so positive that some students were later hired by the firms.

## Location, location, location...Where would the planned facilities be located?

How was it determined which locations/sites in Milwaukee would be appropriate and available to use for the housing? There was an element of luck to this part of the *charrette*. A planning committee formed to choose possible sites. Many people served on the committee. Members included academics, a person from the Milwaukee County Department on Aging, and a past Wisconsin Housing and Economic Development Authority (WHEDA) ([www.wheda.com](http://www.wheda.com)) member with an interest in housing. Interestingly, many of the academics on the planning committee maintained that the sites could be theoretical—that actual space needn't be ready or accessible for this competition of “imagined buildings” to occur. On the other hand, some community members in the focus groups insisted that these had to be real sites for sale, available and ready for use. *This was a source of tension*. In the end, the planning committee selected sites in a variety of ways:

- One site was proposed by a religious order because the space lay empty, and there was personal trust by the Nuns that Weisman would do his best to respect their wishes for its use.
- In another neighborhood, local residents had a lot which they wanted cleaned out and renovated.
- The *Milwaukee County Department on Aging* helped to locate other available sites.
- Neighborhood Associations offered suggestions.
- The need for sites spread by word-of-mouth, and some sites were offered up without active seeking on the part of the *charrette* team.

Importantly, although the planning committee selected the sites, everyone listed as a sponsor, as well as those in the focus groups, had a vote on which sites were chosen.



*A poster showing different vantage points of one of the selected sites.*

## Where to hold the actual competition: Logistical challenges

After the “movers and shakers” decided that the *charrette* would actually happen, they began to discuss *where* the events would occur. There were two broad possibilities for *charrette* locations. On the one hand, the UWM campus offered several advantages:

- UWM, being a state school, could be viewed as a public forum, neutral, and with no vested interests or agendas—outside of generating novel ideas for senior housing. With that in mind, it was hoped that the general public would feel welcome to visit and enjoy and take part in the week’s activities.
- UWM’s School of Architecture had the computers and software that the architectural teams would need to work on their designs. Students could help the professionals quickly learn how to operate the software.

Others saw disadvantages to having the *charrette* on the UWM campus:

- Parking at UWM is limited and costs money.
- Wisconsin winters are notoriously cold and icy—especially in February, when the *charrette* was held—so some seniors expressed reluctance to venture out to participate in the events.
- Universities are mainly designed and geared towards the needs of students, not the elderly, so there was a perception by some that needs of older adults would not be catered to well enough.
- Some of the architectural teams felt that the learning curve for operating computer equipment at UWM was too steep. The time needed to learn new software interfered with the ability to work quickly and efficiently, undermining core aspects of the *charrette* concept. The preference of some teams was to work at their own facilities, and later come together to share results in a public forum.

Ultimately, the *charrette* was held on the UWM campus, but the need to better accommodate the architectural teams and make the environment more inviting to seniors were valuable lessons learned.

# And the charrette begins...

## Pre-competition events

The week began with *two pre-competition events*. The first was a summit—*Issues in Aging: Senior Housing*—sponsored by the Milwaukee Aging Consortium (MAC). The MAC is a non-profit membership organization devoted to improving the lives of older people by connecting the professionals who serve them. Their membership includes 170 agencies that provide services to older people. The MAC housing summit and the UWM *charrette* came together because of the similarity in topics and audiences. The Consortium saw the benefit of having the architecture firms and students involved in their housing summit—particularly as the discussion covered city planning and changes to the physical environment for *aging in place*. Meanwhile, the UWM planning group saw the benefit of attracting the service-provider community to the *charrette events*, particularly William Thomas' evening presentation, which went beyond aging in place to *aging in community*. Together, the MAC and UWM cross-promoted the events.

Topics at the MAC summit included: current and future challenges in housing for older people; housing options which are available now; and an exploration of the concept of *aging in place*. Speakers included Rocky Marcoux, Commissioner of the *Milwaukee Department of City Development*; local visionary Cordelia Taylor who began the multi-generational care facility *Family House*; and Stephanie Sue Stein, head of the *Milwaukee County Department on Aging*.

Another pre-competition event was the lecture given by William Thomas, M.D., founder of the *Eden Alternative*, a unique housing concept for seniors that has been enthusiastically embraced by gerontologists and experts in aging from all corners of the U.S.

Friday, February 2nd, 2007

*Milwaukee Aging Consortium Housing Summit*

Italian Community Center, Milwaukee, WI

8:00 am to noon

Wednesday, February 7th, 2007

*Lecture: "Moving from Aging in Place to Aging in Community"*

Dr. William Thomas, Eden Alternative, AARP

Zelazo Center, UWM

6:30 pm to 8:00 pm

## Ideas Competition Events.

**Aging in Community**, the senior housing ideas competition, brought together consumers, care providers, experts in aging, government officials and eight architectural firms, who produced *a broad range of designs* for senior housing for four sites in the city of Milwaukee. The collective goal was the creation of innovative designs which clearly reflected the five objectives that shaped the competition: (1) create opportunities to age in place; (2) strengthen links to the larger community; (3) nurture informal social supports; (4) foster energy-conscious design; and (5) provide barrier-free settings.

Friday, February 9th, 2007

*Lecture: Planning and Designing for Innovation in Senior Housing*

William Brummett, AIA, Senior Housing Architect, Denver, Colorado

Zev Paiss, Senior Housing Consultant, Boulder, Colorado

Architecture & Urban Planning Building, UWM

4:30 pm to 6:00 pm

Friday, February 9th, 2007 through Sunday, February 11th, 2007

*Design Charrette: Competition involving eight Milwaukee architectural firms*

Architecture & Urban Planning Building, UWM

Friday 6:30 pm - 12:00 pm, Weekend 8:00 am - 9:00 pm

Sunday, February 11th, 2007

*Closing events: public review and discussion*

Architecture & Urban Planning Building, UWM

1:30 pm - 4:30 pm

## And the teams start their work!

Perhaps the most exciting part of the whole *charrette* was seeing the architectural teams—comprised of professionals and students alike—do their work. There was energy, enthusiasm, excitement, and creativity in the air! It was a long, tiring weekend, but in the end, all agreed that it had been productive and met its aims with great success.

*Lively discussions among members of the AG Architecture team.*



*The team headed by Kim Hassell of Plunket Rayside Architects working on a design.*



*Examining computer designs...(Engberg Anderson).*



*Architect Russ McLaughlin works on a design as members of the public observe.*



*Time for a break!*

## II. Key Points from the Lectures and Discussions

## Lectures: Some High Points

Part of what attracted interest in the Milwaukee *charrette* was the trio of world-renowned speakers who gave talks about issues surrounding senior housing. The lectures added richness to the week's activities, showing what the "movers and shakers" in the field are actually accomplishing in the real world. Below are some highlights from these engaging and informative lectures.

**William H. Thomas, M.D.** is a physician with a special interest in aging and the elderly. In 1991 he developed *The Eden Alternative*, a new and innovative way to think about and provide care for frail elders. Facilities that adopt the Eden Alternative bring decision-making in line with the needs of the Elders, rather than facility needs that are often based on a hierarchical medical system of functioning. Once this cultural change has been accomplished, large numbers of companion animals, indoor plants, gardens, and children are introduced.

*"I like to deconstruct commonly held ideas about aging. I try to examine those concepts that are most widely accepted, analyze the underlying assumptions, and consider rearranging the ideas in a different way. For the issue of housing for older people, I have focused on the implications and assumptions about 'independence.' I strongly believe that commonly held understandings about independence have greatly influenced attitudes about, and approaches to senior housing."*

—William Thomas, M.D.



*William Thomas, M.D. makes key points during his powerful address.*

On the issue of housing for older people, Thomas outlined three main ideas:

1. The “either-or” perspective of the dependence/independence continuum is a faulty dichotomy that drives how we think about housing and seniors. *Aging in place* is a housing strategy created by our deep-seated fear of dependence.
  - We have a cultural belief in *linear aging*—you’re young, you move into middle-age, then you’re old.
  - Part of the belief in linear aging is a deep-seated fear of dependence. There are few things that provoke more anxiety among older adults than the fear of waking up one day to realize they are a burden on others.
  - We (as a society) label the concept of dependence in a highly negative way. There are few, if any, redeeming features of dependence. It’s bad.
  - The reality is that *we are all dependent*; it is actually the true nature of our lives. But this dichotomy turns aging into a zero-sum game, whereby each day you are either more independent or you are dependent. Thomas says, “In fact, aging is a lot more complicated than that. It’s wrong and a disservice to older people to define the terms of a game where they are guaranteed to lose.”
  
2. We (as a society) do not have the money to pay for everything the 76 million baby boomers are going to need in old age, particularly because people are living longer.
  - Given the sheer numbers of people who will experience old age in the coming decades, we need to tap into *social capital* as a way to offset the impending financial costs of baby boomers’ care, as well as to foster community.
  - Unlike financial capital, social capital is difficult to grasp and its value harder to determine. Essentially it is the sum total of the value of all the informal relationships that are a part of daily life.
  - Though difficult to put a number on its value, social capital, Thomas argues, dwarfs the financial capital that is available to us—no one would want to give up their social capital, or give up the meaningful relationships in their lives.
  - Social capital, the meaningful relationships in our lives, is what we can access to help meet our needs as we age. Greater social capital then, translates into the need for fewer (paid) services in old age.
  - The question of our time is: “How do we create and increase social capital? How do we increase the voluntary, reciprocal relationships that are a part of our every day lives?”

3. The answer to this question—and the way out of the zero sum game—is through *community*. Our creativity, innovations, designs, policies, and philanthropies should tip us towards community.
- People must rely on paid services and institutions when their needs are greater than what community can provide for.
  - *Aging in place* (injecting paid services into housing) is not a sustainable strategy for fostering reciprocal relationships. Housing and new designs for senior housing should be based on interdependence—the ability for people to rely on one another on a daily basis. “Community is predicated on the ancient notion of healthy interdependence,” according to Thomas. Traditional nursing homes do not fulfill this notion but rather measure and define age in terms of decline.

### Examples of senior housing that foster community:

- *The Eden Alternative*: A traditional nursing home transformed into a “garden for growing people.” The core concept is that we must teach ourselves to see places where Elders live as habitats for human beings rather than facilities for the frail and elderly (see: <http://www.edenalt.org/>).
- *Green House*: Small dwellings for up to 10 elders, founded on a non-institutional understanding of elders and elderhood that puts a primacy on growth and development, both for the elders and the people who care for them. This is a community-based residential alternative to institutional long-term care in which funding flows through the nursing home payment pipeline.
- *Cohousing*: Small groups of people coming together to live in their own private housing, but sharing common space for making meals, having meetings, and sharing social activities. It’s a highly participatory, intentional process and includes a dense neighborhood design. It requires the desire to be a good neighbor!

*“We should embrace community because it offers us a way out of the bipolar vision of linear aging as a struggle between independence and dependence.”*

–William Thomas, M.D.

## Lectures (cont.)...

*Zev Paiss* is a principal in *Abraham Paiss & Associates, Boulder, Colorado*, an independent business that helps cohousing communities get started across the United States. He is a national spokesperson for the cohousing industry, known for his expertise in the areas of group process, grassroots marketing, and community building. Mr. Paiss was the founding executive director of The Cohousing Association of the United States, an organization he ran from 1998-2002.

During his lecture, Mr. Paiss discussed his vision of *senior cohousing*:

*“Senior cohousing has only been in this country for about 15 years. It’s quite new. It came from Denmark, and the Danes have been doing it for about 35-40 years now. Senior cohousing is a response to neighborhoods that no longer match the urban, contemporary lifestyles we lead today. The solution to this, we believe, is to surround yourself with a community of people—a community of neighbors who know one another, who care for one another, and who can really help support each other as they age. So the larger idea is that we want to **age in our home within a community**. And that, in it’s simplest form, is what cohousing is all about.”*

—*Zev Paiss*



# Zev Paiss's Ten Principles of Senior Cohousing

The following principles represent a mental model of senior cohousing.

1. The scale is small—like a small neighborhood or village in which one can know their neighbors—about **15 to 35 homes**.
2. Senior cohousing involves **direct participation by residents**, who plan many aspects of their homes and choose how they are going to live as a group of neighbors. Cohousing is designed to promote interaction among neighbors, so major decisions are made by the residents themselves.
3. It is important that **the group comes together to recognize their common values and determine their broader vision**. They have to make sure that they are all on the same page so they can thrive. It takes time to do this. They must spend time together in meetings or retreats.
4. **Senior cohousing is designed to enhance a sense of community**, with planned common areas that people must walk through instead of a design that fosters privacy.
5. **Senior cohousing is designed for aging in place**. It is architectural design with an eye toward the idea that people *won't* ever have to move because of functional reasons (i.e., changes in their ability to care for themselves). For example, one might want a facility where residents can transition into an assisted living, but they don't have to move. If and when their functional abilities decline, services can then be brought to the residents.
6. **Having a common room is vital to cohousing**. It is really supposed to be something you go to not just for special social occasions, but rather, as often as once a week or every day. You pick up your mail there; there may be shared laundry facilities; there is a big kitchen and dining room; bathrooms; workshops; and library or media rooms. There should be significant opportunities for people to do things together here, representing a combination of private homes and shared facilities. Common facilities should reflect the features that residents want.
7. Cohousing is unique because **it is not run by outside homeowners' associations**, but rather is managed by the residents who have regular business meetings. At these times, residents decide what they can and want to accomplish themselves, and what tasks would be better left for hired help.

8. **Community decisions are made using some form of consensus.** For people who have never used consensus before, the process can sometimes seem quite daunting. But the reality is that if you spend the time in the beginning figuring out what the pros and cons of certain things are—what’s important to people—you can come to very solid decisions that don’t get overturned.
  
9. **Cohousing promotes the idea of an environmentally-conscious way to live and grow old.** The tightly-clustered, energy-efficient structures in which people do things together and share resources indicate respect for the environment. In senior cohousing, you don’t have to depend on foreign sources of energy. And with the advent of the Internet, you can still be a global citizen, and not necessarily have to travel all the time and use fossil fuels if you don’t want to.
  
10. **One of the most important concepts in senior cohousing is that of “spiritual eldering.”** Many of us recognize the value of passing on what we have learned in our lives to future generations. We want to pass on our accumulated wisdom, give back to our community, and share with one another. These neighborhoods provide an incredible cauldron for those kind of things to happen because you have people together, who have had a variety of different life experiences, and who can share and pass on their wisdom to others.

## Lectures (cont.)...

William Brummett is president of William Brummett Architects, P.C. in Denver, Colorado, a full-service architectural design, consulting, and research firm specializing in the creation of innovative housing and care environments and products for those with special needs. Mr. Brummett received a national fellowship from the American Institute of Architects and the American Hospital Association to study assisted living nationwide. His book, *The Essence of Home: Design Solutions for Assisted Living Housing*, which won a 1997 Polsky Prize for Innovation and Design Communication from the American Society for Interior Designers, describes the results of that study.

*"I want to underscore the value of trying to understand the residents' needs when making a design. We must design for adaptability and flexibility, because peoples' needs change. In response, we need to be able to change our designs of buildings. There needs to be a general understanding that we must take risks in our designs. Our experience seems to suggest that, when creating senior housing, settings and activities that are particularly rich and meaningful work best. I think it's critical to support and create design for independent housing—and to consider places and activities and amenities that allow for people of age to keep their lives rich and meaningful. I think you will see that the themes I shall describe are all common to many of the projects which have emerged from this [charrette](#)."*

—William Brummett



*Bill Brummett makes a point.*

# Themes about Aging in Place:

## William Brummett

1. The first and most important theme is the notion of *authenticity*. This idea emerged when we began to understand the people for whom we were designing. TV commercials and print ads often depict the completely vital, healthy 65-year old, playing tennis and drinking a martini. Those are not the people for whom we are designing. Those are people who are happy in their present homes. Instead, we are designing for persons 85 years and older who are still mostly functional, but who might also have some age-related impairments.
2. Secondly, there is an expanding need for housing beyond metropolitan centers. We've got to provide affordable senior housing and care in rural settings or resort settings that are somewhat isolated.
3. We are dealing with continuing care that is changing very quickly. Frequently, when we think about continuing care, we usually draw a line to represent a continuum of care: on the left side of the continuum are structures that are geared to those who are highly functional, while on the right are structures for those who are less functional. And there are points along the continuum that represent certain different levels of service. This is a traditional way of looking at senior housing design. Yet, whenever we discuss this continuum, we all argue what's happening to it. The value of this weekend's symposium is that, if we are going to meet that desire, we are going to need to come up with some creative ways of allowing people to be independent in their own settings, even when their needs have expanded.
4. I want to stress that our goal is to allow people to age in place, but in their preferred setting.
5. Another thing to remember is that the average age when elders take their first step into the continuum is much older than most think it is.
6. Lastly, I want to remind us all about the challenges we're trying to meet by designing for aging in place. Of course, older adults often have mobility impairments, and those are not limited to someone needing a wheelchair or walker, but often involve the inability to reach high or reach low or sit low. Think about how that might affect your design of a kitchen or how you might design a bathroom; it will have a big impact on the final result. Sensory impairments, including poor vision and poor hearing, will also impact how you design. So when designing, we must anticipate and be able to meet the needs of those with compromised cognitive abilities.

## Questions from the audience for William Brummet and Zev Paiss:

A question and answer period followed Mr. Paiss's and Mr. Brummet's lectures. Below, we highlight these exchanges, which were truly informative and interesting, both from the vantage points of the audience and speakers...



*William Brummet (left) and Zev Paiss*



*The audience gets involved in the discussions...*

### **Q: How do you get the word out about senior cohousing?**

**A:** Ever heard of the book, *Gorilla Marketing*? We use these "gorilla principles" in a lot of the marketing that we do. We are very grassroots. Often there are groups of people out there who just put themselves on our mailing list. Also, we spread the word by letting folks know that there are 25 people in their part of the state that are interested, and we help them get together. It then morphs into a more formal undertaking, when we have on-going presentations. Actually, it's a very self-selecting process. There's a lot of word-of-mouth, really good articles in the paper, flyers, etc. But it's not a high-tech advertising program. Once people realize they share the idea (cohousing), they get very excited and start to connect with one another.

### **Q: What's the scale of these projects? Should they be on the small side, or can you have larger senior cohousing developments?**

**A:** I think the scale is a very important issue. Approximately 15 to 40 households are optimal, because once you start to get much larger than that, tending to the needs of one another becomes very difficult. In a multi-cultural environment, you may have to have a tapestry or mosaic of neighborhoods. In these cases, you have a variety of people/communities with their own flavor, but also living close together so you can they can connect with one another very easily without having to get into a car. So scale is really important. And, in new urbanist environments, there are different regions where cohousing may be one larger neighborhood or, in contrast, it could be a new urbanist neighborhood with several hundred units. Think of it in terms of a neighborhood scale so that way people can connect with each other on an on-going basis.

**Q: If you want “out” of the system, are there any restrictions about who you can sell to?**

**A:** In the cohousing model that’s 15 years old, the turnover is actually very low compared to typical neighborhoods. A lot of the communities have added 30 or 35 households; among those, approximately half a dozen have sold. The turnover is much lower than in traditional housing. That’s because people really like that they are connected, and they have roots in cohousing communities. But when there is a turnover, usually there are no legal restrictions about to whom you can sell your home. There may be some kind of income requirement for the new people coming in.

**Q: How long does it take, from the time someone commits to living in senior cohousing, to the time when they can actually move in?**

**A:** Getting a cohousing development started involves many processes: technical, legal, design, etc. What we have done in this country is to stream-line the whole process and make things unfold in parallel. Thus, you have this very technical, legal, financial system moving forward on the one hand, while on the other, you are doing the planning, financing, design, and the construction simultaneously. All of this will take a couple of years. But by the time we break ground we already have 50% to 70% of the homes pre-sold, without having residents bogged down in all of the minutia of design or taking the plans through the city process, etc.

**Q: What is the diversity like in these communities?**

**A:** They are pretty diverse in terms of the economics of the people living there; at a minimum, they need to be able to buy a house. So in many cohousing communities, you won’t see a lot of 20-somethings, because they generally don’t have the financial resources at that age.

Unfortunately, we don’t really see much ethnic diversity. I think there are some really important reasons for that. In my opinion, the white population in this country has lost a sense of community because everybody has a fierce sense of what’s already going on in their home neighborhoods. So I think that’s why senior cohousing is mostly a white phenomenon at this point. I would love to see it change, but I don’t know yet how fast that will happen.

What about diversity in terms of size? For the last 10 years, I have observed a march upward in terms of the minimal size of acceptable units. We’re designing skilled nursing units that are 1000 square feet, and assisted living that are 1500 square feet. Small ones are not desirable.

### **Q: What's the age range of people living in cohousing?**

**A:** The age range spans the spectrum. In Denmark, they call this *senior* cohousing. However, they have also built multigenerational cohousing neighborhoods right next to the senior buildings. I think this is the best way to go. That way you have two neighborhoods right next to each other: the senior cohousing has a chance to really focus on the design of aging in place, and you have the children right next door. This is great because, for example, the kids can run over to the seniors' facilities, have story time, and then be sent home afterwards. So the answer is that they can be for all ages and the elder cohousing is really focusing on ages 55 and above...but it doesn't have to!

### **Q: Although it depends on the state, we have encountered some government trepidation about starting these projects. Some states just won't let you proceed. However, some of the legislation and codes for assisted living and nursing are brand new, and they don't always know what they are doing. This gives us some room to step in there and say we are trying to keep everyone happy healthy and safe. Can you address this?**

**A:** Are you asking specifically about cohousing? Well, my clients are exclusively nonprofit organizations or government agencies, and I have found them to be much more willing to pay up front for a long-term payoff, much more so than a private developer. So it hasn't been hard at all to convince some counties or developers to spend the extra money for design up front in order to keep their censuses higher, up front.

**A: (new speaker)** And with cohousing things are funded very conventionally. The only unusual aspects are that the residents are paying the soft costs early on as part of their membership process. So they understand that everything they pay for goes towards the down payment for their home; but they are paying earlier on. There are small percentages of these communities that have affordable homes and sometimes there are some subsidies coming from the cities—CBDG grants, for example. Again, though, these projects are conventionally funded—by the residents with long-term mortgages.

### **Q: How do people come together to start a cohousing project?**

**A:** Well, there are two basic possibilities. Sometimes, it's just a small group of people that would like to be future residents. They start meeting, gather momentum, and eventually they go out and find what they need to make it happen. The other possibility involves a land owner. It might be someone who happens to have a piece of rural property out on the edge of town and would like to have it developed. He announces his intention to develop the land in a unique way, and then we (as consultants) go out and help them bring the people to the developers. It really doesn't matter who first initiates the process, because eventually you need all the pieces: you will need the residents, a place, and a professional development team to help you work through the process. So it can be done in different ways.

### III. Epilogue: Ongoing Meetings and Timeline of Events

## Epilogue: Ongoing Meetings in the Community

In hindsight, we consider the *charrette* week to be highly successful. It generated interest and enthusiasm; it created new ideas for senior housing; and it brought people together to network and move the field forward. But the *charrette* is not yet over... Indeed, there is still activity related to the project which can be seen in several ways:

- In 2006, just prior to the *charrette* week, a website was launched, which describes the entire charrette process: [www.uwm.edu/dept/IAE/AIC.htm](http://www.uwm.edu/dept/IAE/AIC.htm).
- Several months after the *charrette* week, the *Helen Bader Foundation* sponsored a lunch during which an early draft of the first *charrette* booklet was distributed. A display was created with each firm having two boards to showcase their ideas.
- The Milwaukee Aging Consortium helped to disseminate results. Focus groups reconvened and discussed the outcomes of the whole project.
- In October, 2007, the senior housing ideas competition was reported on by Jerry Weisman and Robin Mayrl at the *Grantmakers in Aging* conference, held in San Diego, California. Interestingly, people were not only enthusiastic about using ideas competitions to generate novel, cutting-edge concepts about senior housing, but the competition was also discussed as a possible mechanism to generate ideas about *other* topics relevant to improving the lives of people as they age.
- Mark Proffitt will give a presentation about the design competition at the 2008 conference of the *American Society of Aging*.
- In April, 2008, there will be a city-wide event. This will represent another housing summit. The idea is that anyone who wants to attend, be they a professional, an older adult, or other interested community member, can come. Architects from the *charrette* teams will be speaking. The *Milwaukee Aging Consortium* will convene the conference.
- By mid-November, 2008, all of the meetings associated with this competition will be finalized. However, the hope is to create a demonstration project that will feature some of the ideas emerging from the creativity of the teams.



*Architecture Doctoral Student Emi Kiyota keeps time as teams explain their designs.*



# Timeline of Events

