

## Agency for Change Podcast: Sara Robertson, CEO, The Arbors and Ivy Assisted Living Communities & Founder, The Aging Parent Solution

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**Sara Robertson: 0:01**

Data is always telling us a story.

**Announcer: 0:06**

Welcome to Agency for Change, a podcast from KidGlov that brings you the stories of changemakers who are actively working to improve our communities. In every episode, we'll meet with people who are making a lasting impact in the places we call home.

**Lyn Wineman: 0:34**

Hey everyone, welcome back to another episode of the Agency for Change podcast. This is Lyn Wineman, President and Chief Strategist of KidGlov. So I just came across this astounding fact by the year 2030, the entire baby boomer generation, which is approximately 73 million Americans, is going to be age 65 or older, and that is going to put a huge demand for senior care services and added pressure for the loved ones of those baby boomers who are helping support them and care them and guide them during this difficult time. Today's guest, Sara Robertson, who is CEO of The Arbors and The Ivy Assisted Living Communities, has also just started a new educational resource called the Aging Parent Solution, and today she is going to talk with us about why we need this type of resource and education and just some trends in general and some advice if you are living through this situation. She also told me that her business has just been awarded one of the best cultures in the world and she tells us how she did it. So everyone listen up. Sara, welcome to the podcast.

**Sara Robertson: 1:56**

Thank you so much for having me. It's a pleasure to be here today with you, Lyn.

**Lyn Wineman: 1:59**

Sarah, I am really looking forward to talking to you because I know from personal experience your work is so important and you're going to talk about a lot of different businesses today, but let's start by having you tell us more about The Arbors and Ivy Assisted Living Communities.

**Sara Robertson: 2:19**

We are actually a third generation family business. My grandparents actually started it with a construction company. They built like hotels and plazas, all sorts of different things, and then we eventually got into senior housing, which came before assisted living. And then in 1998, my dad decided

to pursue assisted living. We built our very first community. We were actually pioneers in our area at the time, one of the few that kind of went up first. So that was a great experience and we have really grown since then. We currently have nine different communities throughout Massachusetts and Connecticut. We started our own home care agency called Integra Home Health. And most recently we've started our new business, which is the Aging Parent Solution, which is a senior education business.

**Lyn Wineman: 3:18**

You know I can't wait to dive in on that senior education topic because I think it's so needed. But before we do, I really want to hear a little bit more about The Arbors and The Ivy, because I know you have some unique things that you do to help care for residents and their families. Could you share a little bit more about that?

**Sara Robertson: 3:37**

Yeah, definitely so as a family business, we obviously prioritize our family values. We want to provide a warm, home-like atmosphere for our residents and their families. We actually just won the Best Culture in the World Award through an organization that focuses on culture within senior livings, we have one of the highest scores that they've actually seen, and I would say it's because we are actively involved in our day-to-day business, right, so I am an integral part of the day-to-day operations and what's going on. My regional team has all been with the company over 10 years, up to 26 years, so we have a lot of longevity in our business as well. We have people that have been with us through day one, even on our site, some of our locations, people that I hired 25 years ago are still working within our communities. So I think that that does say a lot about who we are and about what we focus on and prioritize as our values.

**Lyn Wineman: 4:46**

That's amazing, Sara. I have never heard of the Best Culture in the World Award. It makes me want to look it up right now, being a culture person myself, but I've always had the perception in my mind that sometimes the senior living industry can be a difficult industry to retain employees. I mean, wow, what's your secret? That's amazing.

**Sara Robertson: 5:12**

I think it definitely is a challenge. I mean, we still face our own you know employee turnover issues for sure, but I just think that you know, the more you put into your staff, your residents, your families, the more that you can communicate and be transparent and be open. I think it just builds trust and confidence in what we do. I think people have faith in us and understand that we're doing things for all the right reasons.

**Lyn Wineman: 5:40**

Yeah, that's great. That's great. So 30 years, I mean three generations. You've literally grown up in this business, Sara. I bet you've seen a lot and I'm really curious what are some of the biggest hurdles you see, that families have as they're caring for their loved ones today?

**Sara Robertson: 6:01**

I think you know so much has evolved within our industry over the past 25, 30 years that I've been in it. When we started this you know we really didn't have a lot of competition. Our rates were lower, I'd say. You know the average assisted living probably cost around \$3,000 a month. Now it's upwards of \$9,000 to \$12,000 a month. It's a highly competitive market. It's very saturated in some areas. It also used to be more of an all-inclusive social model where everything was kind of in one price, and now it's become more, you have different levels of care, you have medication management packages, you have all these extra fees and costs that come is, you know purchasing, you know assisted living, and all of that has just changed the industry so much.

But then on top of that right you have just where we are today. You know I mean like with technology, and you know financial obstacles and all sorts of different things that we weren't dealing with before. There's a lot more people with dementia and cognitive impairments. You have the sandwich generation right, which is the generation caring for the baby boomers, and things are so different for that generation. They are not only caring for their aging parents but they're also caring for their own children. They are navigating their own careers and their own lives and there's just a lot more on everybody's plates. Overall, that just is a contributing factor that wasn't there before. So the dynamics have changed within families. You know the costs associated with all this has changed. The demand of these services has changed, so it really has just become a completely different animal than it was a long time ago.

**Lyn Wineman: 7:55**

You know, Sara, that makes a lot of sense. People who listen to the podcast, most of them are aware that I'm a relatively new grandmother, right, and I love my grandkids. It's so much fun being a grandmother, but there was a moment when I was very nervous about it because my mother, by the time my kids were born, my mother wasn't really working and she had a lot of availability to help out. And likewise, as my grandparents aged, my mother had time to help them out. And so I think about, you know, I'm imagining myself in my career at KidGlov for another 10 years. Well, I'm going to try and be a grandmother and at some point we're going to have both my husband's parents and my parents. That, you know, will need more assistance, and it will be a completely different situation than I recall my parents and my grandparents. I even remember my grandparents and my great-grandparents, and I think the answer for my great-grandparents was that they came and lived in the home, which I can't even imagine at this moment.

**Sara Robertson: 9:09**

That was the more common approach to be honest with you. We would tour a lot of people, you know, 20 years ago, and that would be their ultimate answer of, well, I think we're just going to have them move in with us, and we still do see it, but is far less common than it used to be you know this generation had fewer children. You know that's, that's a big piece of it. There's less people you know in the family mix to be part of a solution.

**Lyn Wineman: 9:38**

Yeah, yeah. So, Sara, I'm curious. Obviously this is the family business and I'm sure there was a certain amount of expectation, but what really inspired you to get involved in continuing this work?

**Sara Robertson: 9:53**

I think to some degree. Yeah, it was what we did, right, we grew up in this. My sister and myself and my cousin started working in our senior housing projects. I was 13 when I started working there. We were around seniors, you know all the time playing bingo with them and you know baking with them and doing all sorts of different things at those centers. Assisted living has kind of much more evolved from there and it's amazing, and we really got to work in every single role within our business. We've each done every job that there is. So I can know and understand, you know, what each job takes and the time and the consideration and the impact it has.

But overall, I think we just have a connection to the senior population. You know we grew up with our great grandparents. I had all of my grandparents. I've been very lucky and I've been surrounded by them my entire life. You know we had a vacation home and we were there every weekend with them. So we really grew up immersed around family, but especially around like the aging population, but more so like where I'm at today. You know, I got here because we have so many people now that reach out to me and my team just saying, hey, can you help me navigate the situation I have with my parent. This is the situation they're in rehab or they have a fall and what do I do next? Who do I call and what services are optional for me? And just the calls have really ramped up over the past few years of people being confused and not knowing where to start or where to begin on their search. And you know how to help their loved one, how to help themselves find support and resources. So really that's where the aging parent solution idea kind of grew from.

**Lyn Wineman: 11:49**

I love that. Well, let's talk a little bit more about that aging parent solution, because I think it's a really it's a very needed service. So tell us more about that service and you know what even can we start with, how did you take it from? Hey, I've got a lot of people calling and I'm just answering their questions as a friend to how did you take it to a business model?

**Sara Robertson: 12:15**

Sure. So what we did was we kind of like, over the last like five years, have kind of compiled a list of resources, very carefully curated resources, whether they're guidebooks or checklists or just one page infographics of all of these various topics, right, home safety checklist, fall prevention, dementia signs and stages, Medicare facts, Medicaid facts, VA facts all sorts of information that we see people coming to us looking for answers of.

And so, as we compiled this library of resources, we were like we really just need to share this with people, right there really isn't a senior education for families, you know, that is going to give them the resources. So at the Aging Parent Solution, not only are we offering a library of resources, but we're offering senior care courses to really walk people through the aging process, all of the factors that contribute communication, family dynamics, senior living options, Medicaid, end of life, all sorts of different things that are very carefully curated. We also have coaching support calls. So if you just want to have us bounce ideas off with you and have a conversation about, you know this is what we think might work for you, that's something that we do. We also have case management services. We have support groups. We have a live community inside of our program where people can find, you know,

other people going through the same exact situation as. As you are right, this is a very isolating and overwhelming time in your life, and you don't have to do this alone.

We are here to support people with that, and the number of baby boomers that will be coming into this industry over the next decade is going to more than double. So you know, the demand needs to be there for the resources, but also there needs to be an educational component. We need to be able to, you know, educate everyone on what is coming their way. One of the things that we have seen is that we feel the senior industry can be a very siloed industry, meaning that there's a separation of services, right? So you have home care, assisted living, skilled nursing and really no integration in between them.

**Lyn Wineman:** 14:50

And I think a lot of people don't understand even the difference between independent living, assisted living, skilled nursing, rehab, and then I think you get some organizations and being a marketing person, I kind of appreciate this, but it adds to the confusion. Sometimes people kind of put their own spin on it and then they have their own names in it. Just even understanding where do I start can be overwhelming.

**Sara Robertson:** 15:19

Senior care to me, if you view it like an onion right, there's just many, many layers. There's a medical and healthcare layer, there are financial layers, there are legal layers. There are many choices to be made. You need to understand each of these processes, each of the eligibility requirements. What should your income be? You know, in different cases and different variations. At our assisted living communities, we do offer affordable programs through Medicaid and through VA benefits. So that's something that we have, you know, worked really closely with so that way we can provide our families and our seniors with affordable options because we think that you know senior care and senior living opportunities should be available to everybody.

And now what you have is a really an unknown future when it comes to Medicare and Medicaid and even Social Security and veterans aid and attendance benefits. You know, all of that is really going to be an unknown as we proceed forward. You know, and if those programs are affected, it will have a significant impact on the overall affordability of programs for the seniors up and coming as they age, through the baby boomers, and I think it could be a very serious issue in our industry and a significant challenge that families are now going to have to face, on top of everything else that you have already in that layered onion, right? So it just is a real big animal.

**Lyn Wineman:** 16:55

Yeah. So, Sara, question I have for you, because you've really convinced me that these services are needed now more than ever, how do you deliver the services? I mean, do you have to be local in one of your markets, or can you deliver them across the country?

**Sara Robertson:** 17:12

We can pretty much deliver them across the country. For our case management services, we are keeping that to Massachusetts and Connecticut because I think it's important that if we're going to

make, you know, direct referrals and recommendations that it's people that we have built up a trust network with and people that you know we can rely on and that we know are going to take care of the families that we recommend you know to the very best degree. But for everything else, you know I think that the Aging Parent Solution is really an umbrella of resources and it can be a one-stop shop. You know you can come to us and educate your different family members and we can coach you on. For example, there's a guide and a checklist up If you're going to call home care agency, if you're going to call senior living, these are the questions that you should be asking. These are the things that you should be looking at. These are the important factors that should factor into your decision making. So we're really kind of giving them all of these tools and understanding that they're really going to need to make informed decisions.

And that's what it comes down to right. We want our families to feel confident and informed that they're making the best decisions on behalf of their loved one that they could possibly make.

**Lyn Wineman: 18:27**

Yeah, you know, Sara, one thing I love about what you're doing is you're helping people through the big decisions like the financial decisions, the healthcare decisions. I mean those are important things. But I think another thing that's important is, you know, at this time in life you've got generations kind of changing roles and you've got your parent, who's been like your hero and caretaker their whole lives, and they're changing and I think just the fact that you're offering coaching and understanding so that I think as people understand what's going on and have empathy for what's going on, it even improves those relationships, because you want those, you know, whether it's the last few years, the last few months, weeks or days, you want your relationship to be positive and sometimes you know, understanding what's happening really makes that more positive too. So I really do love that.

**Sara Robertson: 19:24**

That's absolutely something that we see. You know, we have more so recently, over the last couple of years, really seen that. You know, these family members that we work very closely with want their parent to have such an amazing end-of-life experience, such an amazing time throughout their golden years, because a lot of them feel they gave me an amazing childhood. And this is you know, they took care of me my whole life and now it's my turn to reciprocate that. It's my turn to give back to them, and I don't know how to do that without you know understanding all of these different layers.

And I think that the more education that families receive, you know about, even like you know, cognitive impairments and how those can first start to show and how just understanding that and understanding how to communicate with somebody in that situation really can change the dynamic if you know what you're doing and you know what's expected, and it just gives you a lot more information to work with.

**Lyn Wineman: 20:29**

Absolutely so, Sara. For people who are listening who are like, wow, I am in this situation, I really need it, I want to check it out. How can they find out more about the Aging Parent Solution and, honestly, any of your family of companies?

**Sara Robertson: 20:46**

So you can check us out online at [theagingparentsolution.com](http://theagingparentsolution.com) or [thearborsassistedliving.com](http://thearborsassistedliving.com). Those are our websites and hopefully enough information there to guide you in the right direction.

**Lyn Wineman: 20:59**

That sounds great and once again, also as a marketer, I'm really glad you got the [agingparentssolution.com](http://agingparentssolution.com), as your URL URLs are getting hard to come by these days.

**Sara Robertson: 21:08**

Yes, yes, they are.

**Lyn Wineman: 21:09**

We will have all of those links in the show notes on the KidGlov site as well. Before we leave this topic, though, Sara, I'd really like to ask you, beyond just connecting with the Aging Parent Solution, to ask you, beyond just connecting with the aging parent solution, what advice do you have for families who might be struggling right now to navigate the whole complex situation that is senior living?

**Sara Robertson: 21:31**

Yeah, I'd say, first and foremost, to start early and start planning ahead. That is the number one thing, right? We see so many families wait until they're in a crisis situation and a lot of times they wait because they don't want to have that uncomfortable conversation with their parent. Right, it can be uncomfortable to say, hey, I've been noticing that there's a decline, or we should really sit down and go through your finances and your legal paperwork. That can be awkward.

So I'd say, like just to get over that hump would be first. To be proactive, ensure that you have the necessary legal documents in place, and then to start the education process of you know the senior living options home care, assisted living, adult daycare, all sorts of different things and what do you think that your parent might be interested in? You know, what might work for your family may not work for another family. So it's going to be paramount that families also come together, right? A lot of times, it will fall solely on one member of the family.

**Lyn Wineman: 22:40**

And that is almost always the oldest daughter isn't it? So, oldest daughters. Get those other siblings together right now and start having this conversation.

**Sara Robertson: 22:51**

Yeah, you need help. You can't do this alone. It's a very isolating and lonely part of life, right, and it's so overwhelming that you don't want to do this alone. You need your family support. You need them to be on the same page as you. It's important to delegate. It's important, as a family, to say okay, we need to have a family meeting about mom. This is what you're going to do. This is what you're going to do. Use a scheduling tool, use a group calendar. Share tasks, share jobs, take turns going to doctor's appointments. It's about communicating with your family, communicating with your loved one, joining a

support group or working with a professional. If you truly feel you're in over your head, you know, get the proper guidance that you need for your family to be successful.

**Lyn Wineman: 23:38**

That's great, really, really great advice. Sara, I want to switch gears a little bit. Everyone who listens to Agency for Change knows that I am inspired by motivational quotes, and you do such inspiring work and your great award for the best culture in the world. I really want to ask you this question because I'd love to have a Sara Robertson motivational quote to inspire our listeners.

**Sara Robertson: 24:07**

Sure. Something that my team hears me say all the time and probably get sick of it is that data is always telling us a story.

So if you look at the past 25 years of the industry, right, there's been trends and opportunities and along the way, the data and the information that we have collected has really guided us in the right direction. You know you need to be proactive, you know, in order to build trust and confidence and take the business in the next proper direction, to make informed decisions to, you know, really be successful in this market that's highly competitive, you have to consistently look at the data in front of you and the trends and the opportunities that are emerging. And you know overall, just like where is this industry going? And you need to. You know, do your due diligence and you know what, statistically, is coming. You know the baby boomers and what impact is that going to have and what does that mean for the industry overall. And I think that by looking at the different sets of data and data that we even collect within our business, you know it's telling you a story. It's showing you where there are needs and where there are gaps in care and where we are missing significant pieces of information for families to make the right decisions.

**Lyn Wineman: 25:27**

Yeah, you know, what is so fascinating is I hear you say that, and I love that quote data is always telling us a story, because I am a storyteller. But yeah, if you can take that data and help it back up. But I think about your grandparents and your parents, you know, as they moved into this business. I'm guessing at some point someone in the generation said, you know, it looks like senior housing is going to be a really big opportunity for us and it looks like assisted living. And now you have gone in and your generation has said it looks like education is going to be the next big thing.

**Sara Robertson: 26:06**

100%. You got it, Lyn. That's exactly what happened. My dad really saw the need coming and I just same with me. I've just I've really seen this need for the senior care education. It's just a huge gaping hole in our industry.

**Lyn Wineman: 26:22**

Yeah, yeah. So, Sara, I'm really curious about the next generation. Do you think they'll wanna to continue the family business?



**Sara Robertson: 26:29**

Yeah, so my kids actually run a Tech with Seniors program at our assisted living communities they run bingo. My daughter is a receptionist, so they are actively involved in our communities. They love it, that's amazing. My nana lives at one of our communities so we go and visit and so they love being involved. It's still a family business and we are still all involved, and my kids are growing up in it, just as we grew up in it.

**Lyn Wineman: 26:57**

I think that's fantastic.

**Sara Robertson: 26:59**

Congratulations to you and the family.

**Lyn Wineman: 27:01**

Thank you, Sara. I have one last question as we wrap up our time together today, and I really have loved this conversation. I love the work that you're doing and I'm curious, as we wrap this up, what is the most important thing you would like our listeners to remember about the work that you're doing?

**Sara Robertson: 27:20**

One. I would say just you know, don't get discouraged. I think that there's a lot to learn and I think that you know somebody like myself and our experts in our field they know everything that they know because they're truly experts, and that this is all we have done for 30 years. You know we can't expect you know people and families that we work with to know any of that information, and that's why I think you know you can't be so hard on yourself that this is so frustrating and so overwhelming. You know that's think you can't be so hard on yourself that this is so frustrating and so overwhelming. You know that's why you know we are pushing that. You know, if you have questions, reach out to us, let us be your guide on this journey.

**Sara Robertson: 27:56**

Let us help you navigate the complexities of this world, because it really is a complex world.

**Lyn Wineman: 28:02**

Yeah, you don't have to do it alone.

**Lyn Wineman: 28:06**

That's fantastic. Sara, congratulations on all the good work and the growth and the new company. I'm going to say I fully believe the world needs more people like you, more services like The Aging Parent Solution and The Ivy and The Arbors, and really I appreciate you taking time out today to talk with us.

**Sara Robertson:** 28:26

I'm so glad that you had me on. Thank you so much.

**Announcer:** 28:30

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