

Watermark University:

An initiative that fosters community and wellness



This senior living organization promotes lifelong-learning and whole-person well-being through an innovative approach that engages residents, associates, families and friends

This article profiles a recipient of the 2017 ICAA Innovators Achievement Award, a category of the Innovators Awards recognizing programs and concepts that advance active aging. The annual awards honor creativity and excellence in the active-aging industry. They highlight innovations that lead the way, set new standards, and make a difference in the lives of older adults.

A desire to foster authentic community and engaged living has long driven Watermark Retirement Communities and its founders. “Watermark was founded over 30 years ago in Tucson, Arizona, with its flagship community, The Fountains at La Cholla,” says Manag-

ing Director Rich Howell. From the beginning, the goal was for each of its communities to be the kind of place that founders David Freshwater and David Barnes would want their parents to live.

After the sale of the Fountains portfolio in 2005, the men teamed up again the next year with the goal “to create a new kind of senior living community,” continues Howell, “one that meets the expanded expectations of a new generation of aging Americans who want to lead engaged, fulfilling and health-filled lives.” Today’s Watermark operation encompasses 52 communities in 21 states, serving 9,500 residents.

The founders also envisioned two legacy projects in Tucson—communities that would “fulfill long-held dreams to bring to the market revolutionary design, partnerships and programming,” Howell comments. The Hacienda at the River,

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Phyllis, resident at The Hacienda at the River, has benefitted from In The Presence of Horses™, a Watermark University course



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As part of a Watermark University program, residents and their families learn how to bottle-feed neonatal kittens in a partnership with Pima County Animal Care's kitten fostering program. The kittens lived at the community for six weeks

opened in 2017, offers assisted living, memory care, rehabilitation and skilled nursing. The Hacienda at the Canyon, expected to open in spring 2019, will offer independent living, assisted living and memory care. According to Howell, programming at The Hacienda communities will “test the potentials” of Watermark University, a signature initiative established in all Watermark communities.

Launched over a decade ago when the company shifted its philosophy on lifestyle and recreation programming from entertainment to engagement, Watermark University is “grounded in research showing that an engaged life brings a remarkable range of benefits in aging

adults,” Howell states. The initiative won a 2017 ICAA Innovators Achievement Award “for culture change, for an innovative approach to lifelong-learning programs, and for efforts to maximize [wellness] opportunities.”

To find out more about Watermark University, the *Journal on Active Aging*[®] recently asked Rich Howell to discuss the initiative and what it means for the organization.

JAA: Please describe Watermark University in brief.

RH: Watermark University is committed to promoting lifelong-learning and whole-person well-being. This initiative

enhances resident and associate wellness in all its dimensions: physical, intellectual, emotional, social, vocational, spiritual and environmental.

Watermark began transitioning traditional activities calendars to Watermark University course catalogs more than 10 years ago. The printed catalogs, with faculty bios, are produced on a quarterly basis. Classes span a wide variety of subjects, generally orchestrated to increase community engagement and provide a strong balance of integrative benefits as well as to celebrate the passions and experiences of each faculty member. This group of leaders is predominantly from within the community, but also includes outside experts. They are assisted by Watermark University advisors to structure their courses to best share their enthusiasm and joy in their subject. In 2017, more than 4,400 Watermark University classes were offered in the organization's communities.

JAA: What was the catalyst for developing Watermark University? And what are the objectives for this initiative?

RH: President David Barnes talks about the genesis of Watermark University this way: “Watermark University is one of the first things that we started to really try to conceptualize fully in 2006 just after David [Freshwater] and I were coming out of a very brief retirement after the sale of The Fountains. We knew that we wanted to do senior living again, but do it differently. Watermark University was at the heart of the concentrated envisioning that we did for the things we really wanted to get right.” Barnes says one of the first “must be’s” for Watermark was that across the board—from residents and their families to associates, management, investors—there would be true community.

Chairman David Freshwater explains this core element of the Watermark culture through a story. An associate at

a Watermark community who worked in housekeeping came forward with the idea of teaching people how to cook her native South American cuisine. She was a bit shy about it at first, but over the weeks, as more and more people heard about her classes and came to them, this associate came to be that person in the community—the Watermark University instructor who was such an excellent cook. She took great pride in her classes and continued to teach them and add others. Everyone looked at her differently, not just seeing her as someone in housekeeping.

JAA: *What are the key components of Watermark University, and what do these contribute to the initiative?*

RH: Watermark University's key components are as follows:

- **Move from passive to active**—Watermark University banishes the paradigm of asking residents to be passively entertained. Residents, associates, families and friends are encouraged to be engaged, either as participant or leader in the course.
- **Focus on local desires/history/resident interest**—Course ideas are not dictated by Watermark corporate, but grow organically out of the community interests and desires.
- **Support whole-person well-being**—Watermark University brings a holistic approach to resident well-being, engaging community members across multiple dimensions.
- **Weave connections with the neighboring community-at-large**—Many Watermark University courses involve members from the larger community, either as course leaders or course participants; in many cases, this brings an intergenerational aspect.

JAA: *What do you consider Watermark University's most notable outcomes overall for residents and associates, and for the organization?*

RH: The scale and scope of the impact of Watermark University on residents, families and associates alike has been surprising. Beyond feeling more invested and involved in their community, individuals are experiencing more personal transformations, bringing their “whole person” to their classes, work and lives.

For example, Housekeeping Director Cheryl Grant teaches Woodworking at Blue Bell Place in Blue Bell, Pennsylvania. “Many residents gave up their hobbies at some point in their lives before moving here, and by [our] offering classes like these, they're able to get back to doing what makes them thrive,” she says. “My class gives me a chance to connect with the residents in a personal way, like I do with my family.”

Another example of transformation comes from The Hacienda at the River. A resident who has participated in a Watermark University program called In The Presence of Horses™ began to teach a math course there with her daughter. From being someone who was living alone and was having some difficulty verbally communicating, Phyllis has become an ambassador for the equine classes, greeting people new to the program. Her main partner is a 12-year-old black mustang named Joe. “I love him,” she says. “He and I could both stand here all day in the stable enjoying this special friendship.” Phyllis's daughter Sue Rein notes that her mother “used to have trouble finding the right word she wanted to say, now you can see it comes pretty easily to her.”

Successes with Watermark University are also notable in higher acuity settings. Denise Barnes, ideation director for The Hacienda projects, notes: “Watermark University is a foundation for families, friends and residents to just spend time together. For example, we fostered neonatal kittens in our memory-care neighborhood through a partnership with Pima Animal Care Center. Residents—

many of whom had been caregivers all their lives—drew special comfort from sheltering a tiny wrapped kitten on their lap. They helped with feeding and savored the moment when the kittens would nod off after their bellies were full of warm formula. Time with the kittens became an important part of their daily routine—often with their family members sitting right beside them.”

JAA: *Watermark plans to partner with University of Arizona researchers to measure the health benefits of participation in Watermark University across the levels of care. Please tell us more about this development.*

RH: Watermark is in the very early stages of assessing the health effects of Watermark University with university-based partners. At The Hacienda at the River Barbara Rector of Adventures in Awareness™, the pioneer in equine therapeutic programming who created In The Presence of Horses exclusively for Watermark University, has known at a gut level over her 40 years of working with them that horses enhance well-being. Along with Dr. Ann Baldwin, research professor, University of Arizona's College of Medicine, and Ann Alden, director, BORDERLANDS Center For Equine Assisted Services, Rector now plans to provide scientific proof. Once a week residents and other participants in the program are monitored for changes in their vital signs as they interact with horses at the campus stable.

JAA: *From an operational perspective, what does Watermark University require practically (e.g., space, staffing, funding, administration, supplies)?*

RH: Watermark University generally operates within already existing spaces and budgets; they are simply put to new uses. When associates or residents lead the classes themselves, Watermark saves

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Residents learn how to craft a mosaic plaque with students from Imago Dei Middle School, with help from Santa Theresa Tile works. The final plaque will be installed in the community garden

some money on presenter costs and puts that money into other areas of the programming like materials costs. The program also gets some noted experts in their fields, such as retired professionals who are now our residents, to speak in their career expertise.

Watermark has a robust intranet where all our communities store their Watermark University catalogs and where best practices around classes and experiences are shared. Additionally, Community Life leaders have regular conference calls where success stories are shared and the vision for the program is reiterated and reinforced.

JAA: *Most initiatives encounter challenges. What obstacles have you encountered with Watermark University, and how have these been addressed?*

RH: Watermark University is a simple concept, but it also can resemble the usual activities calendar that exists in many senior living settings. The greatest obstacle has been getting community teams to understand the difference. The moment of realization of the true potential of Watermark University to engage

and transform lives usually comes with the program's implementation at a community.

JAA: *To what does Watermark attribute the success of Watermark University?*

RH: Watermark University has been a success because it has been taken up at each community. According to Maureen Garvey, regional director of resident programming, "Watermark's Community Life directors are charged with the mission to reimagine their roles—from one that resembled a cruise ship activities director to that of a faculty member and leader of Watermark University."

JAA: *In your view, how has the program advanced wellness and supported an engaged life for Watermark residents?*

RH: The truth is that Watermark University does not just help Watermark residents, but also associates and management. David Barnes and I were working together on wellness programming initiatives the other day and he noted that everyone can actually experience our mission, our true north, through Watermark University. We create "ex-

traordinary and innovative communities where people thrive." It's that simple. 

The Journal on Active Aging thanks Rich Howell and Denise Barnes of Watermark Retirement Communities, and Brian Watson of The Watson Circle, for their assistance with this article. To learn more about Watermark, visit <https://www.watermarkcommunities.com>.

Images courtesy of Watermark Retirement Communities

Five key lessons learned/ comments about offering Watermark University

1. New generations of aging individuals come to senior housing situations with an expectation to live fulfilling and complete lives; the old idea that living at an "old folks home" is a time of waiting is over.
2. In the same way, associates want to bring their best selves to work and be fully engaged in the health and wellness of the residents they essentially live with day by day.
3. Each community achieves the most success when it has its own version of Watermark University, with a unique mixture of classes.
4. Watermark University works best when success stories are shared and celebrated; this supports growth and discovery.
5. Watermark University is dynamic and will be a foundation of the next phases of growth for Watermark Retirement Communities.