

Methodology Report U.S. News & World Report 2022-23 Best Senior Living Ratings

Zach Adams, ScM Kelsey Lu, MS Harold Chen Tavia Binger, MSPH Katherine Hilton Ruoyu Ji, MS Min Hee Seo, PhD Ben Harder



U.S. News & World Report's "Best Senior Living" is the sole and exclusive property of U.S. News & World Report, L.P., which owns all rights, including but not limited to copyright, in and to the attached data and material. Any party wishing to cite, reference, publish or otherwise disclose the information contained herein may do so only with the prior written consent of U.S. News. Any U.S. News-approved reference or citation must identify the source as "U.S. News & World Report's Best Senior Living" and must include the following credit line: "Copyright © 2022 U.S. News & World Report, L.P. Data reprinted with permission from U.S. News." For permission to cite or use, contact permissions@usnews.com.

Executive Summary

This report describes the data and methodology behind the 2022-2023 U.S. News & World Report Best Senior Living ratings. These ratings recognize senior living communities in the following categories:

- Best Independent Living
- Best Assisted Living
- Best Memory Care
- Best CCRCs (Continuing Care Retirement Communities)

The ratings are a feature of the U.S. News & World Report's Senior Living directory (health.usnews.com/best-senior-living), which is a free, web-based decision-support tool created to help consumers who are seeking a senior living community for themselves or a family member.

U.S. News produced the Best Senior Living ratings from consumer-satisfaction survey data collected by Activated Insights and provided to U.S. News for statistical analysis. Activated Insights, a customer and employee analytics platform, oversaw survey design and administration. U.S. News exercised complete editorial control over the analytic methodology described in this report.

To be included in the U.S. News analysis, a senior living community had to participate in an Activated Insights-administered consumer-satisfaction survey between March 2021 and February 2022 and had to meet certain eligibility criteria, described below, that U.S. News defined. A total of 2,494 senior living communities met U.S. News eligibility criteria – and 1,272 were recognized as Best – in one or more of the following categories: independent living; assisted living; and memory care. Of those, 7 were recognized as Best CCRCs.

CCRCs also provide nursing care, which U.S. News has previously evaluated using a different methodology <u>described elsewhere</u>. U.S. News anticipates that in future years a larger share of senior living communities will undertake consumer-satisfaction surveys, thereby becoming eligible for the Best Senior Living ratings. Future editions of this report will reflect the evolution of U.S. News' data set and methodology.

This methodology, including, but not limited to, the calculation of final scores and identification of Best Senior Living communities, is subject to change with each new edition.

Methods

Data for Best Senior Living ratings are obtained through an agreement with Activated Insights, a company that conducts surveys of senior care customers and employees. U.S. News uses data Activated Insights collects through surveys of residents and their family members or appointed representatives (referred to collectively as "family" in these methods). Data for the 2022-2023 methodology were collected by Activated Insights between March 2021 and February 2022.

The survey asks a series of questions to a resident or family member, and they may respond to any provided relevant question on a 1-5 Likert scale (with numeric scores ranging 1-5, 5 being best and 1 being worst). Activated Insights aggregates each question's scores by respondent group (resident or family) at the care level. Responses mapping to "4" or "5" are considered "positive" scores and responses mapping to "1" or "2" are considered "negative" scores. A "surplus" score is created by taking the proportion of positive responses minus the proportion of negative responses, then scaling that value to range 0-1. This score was chosen to emphasize the importance of both positive and negative appraisals. For example, an aggregate response with 80% positive scores and 20% negative scores will result in a lower surplus score than an aggregate response with 75% positive scores and 5% negative scores.

For independent living, scores are derived only from resident responses. For assisted living, scores are derived from resident and family responses. For memory care, scores are derived only from family responses. Because residents tend to respond more positively than family across nearly every question, family scores were adjusted using fractional regressions to make the distribution of scores more comparable before being combined for assisted living scoring.

For each relevant question, we assigned a weight as part of the final score (adding up to 100%). These varied between care levels. For example, the management score is worth 10% of the total score for independent living, but only 5% of the total score for assisted living and memory care.

In order to be eligible for a rating, a community's scores must be available for at least 75% of scored questions by weight (see **Appendix A**), and must meet the following survey response criteria:

Independent Living

- At least 30 resident responses
- or both of the following
- At least 5 resident responses
- At least 30% resident response rate

Assisted Living

- At least 30 resident responses
- or all three of the following
- At least 5 resident responses

- At least 20% resident response rate
- At least 30% total response rate

Memory Care

- At least 30 family responses
- or both of the following
- At least 5 family responses
- At least 30% family response rate

Communities which did not meet the eligibility criteria for rating evaluation but did participate in the survey will have pages created for viewing on usnews.com. All communities that participated in the survey, regardless of whether they were evaluated for a rating, may have descriptions provided on usnews.com of some of the types of services they are known for, as well as testimonials from survey respondents.

To be recognized as one of the 2022-23 U.S. News Best Senior Living communities, an independent living community needed a weighted final score of at least 0.85, an assisted living community needed a weighted final score of at least 0.8, and a memory care community needed a weighted final score of at least 0.8 (see: **Appendix** for question weights). The ratings and eligibility breakdowns, as community counts, appear in the table below, including a count of unique locations (i.e. locations which may have had any or all of the care levels available).

	Independent Living	Assisted Living	Memory Care	Unique Locations
Surveyed	1,040	2,359	1,681	3,045
Met Inclusion Criteria	868	1,531	1,039	2,494
Rated Best	303	767	499	1,272

Out of 127 CCRCs and Life Plan Communities (LPCs) that participated in this year's survey, 73 (57%) earned at least one Best recognition: Best Independent Living, Best Assisted Living and/or Best Memory Care. This year, an additional recognition of Best CCRC was awarded to CCRCs/LPCs that were recognized as Best in all three levels of service; 7 communities met this narrow definition of Best CCRC.

Appendix: Score Weight, by Question and Care Level

Question Topic	Independent Living Score Weight	Assisted Living Score Weight	Memory Care Score Weight
Overall	20%	20%	20%
Value	10%	5%	5%
Enrichment	5%	5%	5%
Location	10%	2%	2%
Safety	5%	2%	2%
Transportation	5%	2%	2%
Care Overall	Not Applicable ¹	20%	20%
Care Respectfulness	Not Applicable ¹	2%	2%
Care Promptness	Not Applicable ¹	2%	2%
Nursing Confidence	Not Applicable ¹	2%	2%
Nursing Respect	Not Applicable ¹	2%	2%
Food Overall	Not Included ²	7%	7%
Food Quality	4%	2%	2%
Food Variety	3%	2%	2%
Dining Promptness	3%	2%	2%
Dining Friendliness	3%	2%	2%
Management	10%	5%	5%
Staff Overall	10%	10%	10%
Maintenance	5%	2%	2%
Housekeeping	5%	2%	2%
Accounting	2%	2%	2%

_

¹ Not Applicable: This question was not applicable to independent living communities.

² Not Included: This question was not available to all independent living communities, so was excluded from scoring calculation.