



Contributor:

**Rodney Alderfer**

President @ CEO



The LeadingAge Center for Aging Services Technologies (CAST) is focused on accelerating the development, evaluation and adoption of emerging technologies that will transform the aging experience. As an international coalition of more than 400 technology companies, aging-services organizations, businesses, research universities and government representatives, CAST works under the auspices of LeadingAge, an association of 6,000 not-for-profit organizations dedicated to expanding the world of possibilities for aging.

**For more information contact:**

Zohra Sirat, Project Manager, CAST  
zsirat@LeadingAge.org  
(202) 508-9438  
LeadingAge.org/CAST



## Transforming Daily Life at a Life Plan Community through Digital Wellness and Communication

*Selection of Values Offered (Based on [Bain @ Company's Elements of Value](#)):*

- Integrates
- Provides Access
- Simplifies
- Connects
- Affiliation and Belonging
- Wellness
- Motivation

### *Organization Name*

Bridgewater Retirement Community

### *Organization Type*

Life Plan Community

### *Organization Description*

Bridgewater Retirement Community is a life plan community located near the center of the Town of Bridgewater, Virginia. The 55-acre campus houses residents in Independent Living, Assisted Living, Nursing Households, and Healthcare.

### *Case Study Objective*

Before partnering with Wellzesta, Bridgewater Retirement Community (BRC) faced challenges similar to those of many other life plan communities, struggling with outdated, limited channels of communication and programming with unbalanced coverage of the eight dimensions of wellness. As they introduced Wellzesta and digitized their community, the BRC team and residents saw transformation in their community's communication, wellness, and engagement.

## Preface

To show how embracing digital wellness and communication through Wellzesta has transformed the daily lives of Bridgewater Retirement Community's 300+ Independent Living residents, as well as those of the staff and members of the outside community.

## Project Description

Wellzesta, Inc. installed the Wellzesta Life and Active platforms at Bridgewater Retirement Community in September 2018 to approximately 320 Independent Living residents and 20 staff members. The primary goals were to increase the overall wellness of the community through improved wellness programming, increased participation in events, and a greater knowledge of multidimensional wellness; and to move the community from paper communication to two-way mobile messaging with real-time resident feedback and up-to-date alerts, announcements, and updates.

## Socialization Modality

Community App that offers Event/Activity Sharing, Video Chat, E-Mail, Text Chat, Digital Signage, Community Blog, Activity Calendar, E-Reader/Electronic Books, Concierge Guide, Art, Games, Exercise, Music, Facilitated Communications and Conversations, Friends Network, Wellness Goal Setting, Wellness-Based Video Content.

## System Embodiment

App running on iPad tablet and iPhone for users (residents and future residents); Web App also available for residents (smartphone, laptop, desktop, kiosks, website); Web App running on tablet, laptop, and desktop for staff; Voice-activation in App, cloud-hosted back-end server.

## Business Model

Private Pay, Medicare, Standard of Care.

## Outcomes

As explained through [Bain & Company's Elements of Value](#), it is critical to understand the value that consumers perceive in your company's product in order to improve offerings and offer new ones. The thirty Elements of Value include functional, emotional, and life-changing values, culminating with those that cause significant social impact. Wellzesta uses these elements to define its impact on its partnerships and define how

to grow in its offerings. The BRC team perceived, and Wellzesta then offered (and continues to offer), the following values:

## Integrates

*Integrating different aspects of life.*

The BRC team has integrated many aspects of daily life at the community into the Wellzesta platform. Events, meals, the resident directory, and access to community services are consolidated in the app, along with on-demand wellness content such as articles and videos. Beyond all of these elements, residents are able to set personalized wellness goals and track their progress through the app.

BRC's residents quickly saw how Wellzesta would impact their lives, and now BRC sees a 98% usage rate of the Wellzesta Life app among their Independent Living residents.

## Provides Access

*Providing access to information, goods, services or other valuable items.*

Wellzesta gives the residents of BRC easier access to the full range of opportunities offered at their community - from registering for events to reading menus to easily contacting community service providers. By eliminating the need for residents to register for events on paper sign-up sheets, Wellzesta introduced a new type of equity to the system as all residents have a chance to sign-up for limited registration events through their iPads.

According to BRC's Director of Resident Well-Being and Engagement, Laura Spicer, the change is "night and day." "We have the ability to communicate very quickly and the residents know it's their tool for communication," Spicer said. "They're coming to meetings and reminding us, 'Don't forget to put it on Wellzesta!'"

## Simplifies

*Reducing complexity and simplifying.*

Wellzesta streamlined the many methods of communication used by the BRC team into one easy-to-use digital platform. Rather than looking to bulletin boards, newsletters, handouts, and sign-up sheets for information, residents can now trust Wellzesta as their up-to-date source of community information. Staff no longer have to worry about printing corrections for outdated times and dates that appeared in the newsletter

- now they can instantly update information in Wellzesta. This also simplified the process of providing emergency alerts for the BRC residents; rather than making phone calls and knocking on doors at over 240 residences, team members can send out an alert on Wellzesta Life to let residents know about urgent updates.

## **Connects**

*Connecting with other people.*

Wellzesta is allowing team members and residents to connect in a new way through personalized, up-to-date communication, but it's also helping residents connect with each other. Spicer recounted multiple interactions with residents who have made new friends and connections at the community because they used the Connect directory in the app.

The impact of going digital has affected those outside the community as well. College students now come to the BRC campus to help residents with technical support, and through the time they spend together, valuable intergenerational relationships are built. Through messaging and FaceTime, residents are using their iPads to connect with their friends, neighbors, and family in a new way. Spicer also mentioned a future resident who is moving to BRC from New Mexico who is already connecting with current residents and familiarizing herself with the area through Wellzesta.

## **Affiliation and Belonging**

*Helping people become part of a group or identify with people they admire.*

Residents are also using Wellzesta to interact and communicate with groups at the community. These groups, such as the Library Committee, Village Choir, Art Group, Wood Workers, Retired Ministers and Spouses, and the Neighborhood Advisory Council, are often a great source of pride and belonging for the residents. Through the Groups feature on the app, residents can join open groups and coordinate meetups and activities through email.

## **Wellness**

*Improving people's physical or mental state.*

Before working with Wellzesta, BRC's wellness programming was limited. "We have a very traditional

activities program that offers a lot of engagement for our residents, but unfortunately the marketing and the communication of it was always a challenge," said Sarah Hagan, VP of Independent Living for BRC. "For our wellness program, we primarily focused on physical programs but didn't look at a whole-person wellness. We were not measuring all or valuing all dimensions of wellness, we were just focused on the physical piece of wellness."

After partnering with Wellzesta, however, the team began to see their wellness offerings in a new light. "Now we can really start to transform our programming, [focusing on] what sort of things we're offering and highlighting," said Spicer. Since the completion of Wellzesta deployment, the BRC team has added programs in financial, emotional, environmental, and vocational wellness, the dimensions that had previously been lacking at the community.

## **Motivation**

*Spurring people to achieve their goals.*

Within the Wellzesta Life app, residents can earn wellness points (which are based on the eight dimensions of wellness) by attending events and meals and reading wellness articles. They can also set goals for their points each month, which helps keep them motivated, and they can see what types of wellness points they are earning the most and what areas they need to focus on. As the team transforms the wellness programming at the community, the residents can transform their personal wellness as well.

Similarly, Wellzesta Life offers a feature called DOT - your personal wellness coach. DOT stands for Do One Thing, and each week, on-demand wellness content is posted to encourage residents to try something new. From yoga, to journaling, to volunteering, and more, DOT gives residents an easy way to get out of their routines and stretch themselves in a new way.

### *Challenges and Pitfalls to Avoid*

Even though Wellzesta offers small group, hands-on training sessions with the residents, there is still a strong need for continued education and practice. Avoid sessions that are longer than 60 minutes and allow residents to attend multiple sessions and register in advance for additional practice and support.

### *Lessons Learned/Advice to Share with Others*

Allow for extra training for voice activation and launching other apps. Additionally, some residents found using styluses helped if their fingers were too large to type or swipe screens.

### *Conclusion*

Since partnering with Wellzesta, the team and residents at Bridgewater Retirement Community have seen transformation in the daily life of the community. Wellzesta's emphasis on streamlined communication, whole-person wellness, and interpersonal connection allows Bridgewater to even more fully embody their mission: to provide residents with "energy for life".



"Mrs. Lenna is 101 years young! What an amazing day coaching residents at Bridgewater. Here she is learning to navigate an iPad and use Wellzesta Life."