



The Path to Purposeful Engagement

A Guide for Implementing a
Community Approach to Purposeful Engagement
That Residents Drive and Direct

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Purposeful Engagement as a means of supporting quality of life for people living in residential care settings has always been a challenge in a world that was built around a medical model, with its focus on efficiency and tasks. This has never been more evident than in the world we are currently living in.

Since the onset of the COVID-19 pandemic, the primary focus area has been resident safety. Drastic measures were taken by senior living and care communities such as closing the community to visiting family and friends and not allowing anyone but essential personnel into homes. Meanwhile, residents have been “distanced” from their peers, with many spending their days alone in their rooms. Yet, there’s promising news. We are seeing a decrease in restrictions as we continue to learn more about the virus and with the recent start of vaccine distribution. The initial measures that were necessary at the beginning of the crisis are being relaxed, giving everyone a chance for more social connection in the coming months.

We now have the opportunity to reflect on what we learned during the past year and make intentional decisions as we move ahead. A word that we’ve heard constantly from forward-thinking senior living leaders is **engagement**. How do we engage residents without the ability to hold community-wide or small group activities? What do we do without the dedicated volunteers whom we count on

to enhance our ability to engage residents? How can we help residents cope without their regular visits from family members and friends?

We provided residents with things to do throughout the day, but we wondered if that was enough. Think back to conditions before March 2020, when the traditional activity calendar would be packed with events from morning until night, yet some residents would still say, “There is not enough to do.” Perhaps they meant to say that there were not ***the right things to do***. Engagement is only one piece of the puzzle. No matter our age, being busy and having things to do only brings limited satisfaction into our lives. Instead, it is when we are involved in actions and events that provide us with meaning and purpose that we achieve contentment, feel valued, and become whole.

This white paper outlines how senior living and care communities can transcend both staff-directed group engagement and person-centered thinking to create a community approach to purposeful engagement that is resident driven and directed.

ASK: Are we getting interaction and engagement when Activity or Life Enrichment staff is not present?

AIM FOR: “Creating communities” based on similar interests and passions.

IDEAL: Replace the Activity Calendar with the Club Model.



Community Culture: From Activity-Based to Active

Purposeful engagement thrives when a community cultivates the active and sustained involvement of residents who are empowered to create their own activities and decide how and with whom to spend their time. To reach this ideal, take a close look at the current state of engagement in your community. Start by addressing these two questions:

- What happens when Activity or Life Enrichment staff is not present or actively running programs?
- Is there quality engagement in the evenings or during weekends when residents typically have less interaction with staff?

In answering these questions, many communities discover that when a staff-directed activity is not taking place, there is an overall lack of resident engagement. If this scenario seems familiar, it's likely that your community has an activity-based culture, where residents are passively waiting to be engaged in scheduled group activities. That means purposeful engagement, where residents' lives are truly enriched, might be in short supply.

What Does It Take to Build a Culture of Purposeful Engagement?

To achieve a culture that fosters purposeful engagement, staff should be guided by the goal of “creating communities” within the residential community. In other words, they should cultivate many small groups of residents who share similar interests and passions. To create these groups, staff must possess deep knowledge of each resident's preferences. Staff can gain this insight by not only cataloging residents' past lives, careers, hobbies, and family status, but also by asking them and documenting what excites them, what they want to learn, and what skills and talents they could share with others. For example, you may discover that your community has three or four residents who are retired educators with a passion for teaching children. How can you bring them together to inspire them to think of ways their talents can be used for outreach beyond the senior living community? What is the ideal setting for them to interact? In a culture of purposeful engagement, the activity calendar and large group activities are supplemented, or sometimes even replaced, by what Scott Smith, former Director of Education and Experience for Thrive Senior Living, calls the Club Model—an ecosystem of small, interest-based groups.¹

How Can the Right Technology Support the Club Model?

Identifying and then matching residents' interests can be a time-consuming and labor-intensive process, and this is where technology can help. Engagement technology tools automate interest matching to help communities leverage the Club Model approach and form the small, targeted groups that lead to purposeful engagement. The right system offers a digital interface that helps collect interests, hobbies, past experiences, and aspirations of both residents and staff, avoiding the commonly used paper-filled binder that quickly becomes a repository of information instead of a dynamic profile. Once the data is collected in the system, it can be easily integrated within the existing workflows of all team members—not just Activity or Life Enrichment staff. As a result, the community gains a resource that drives connection and engagement opportunities for each elder. Instead of simply identifying and revealing each resident's interests, an effective solution automatically matches residents with other elders and team members whose interests and passions align. In this way, engagement technology becomes the suggestion engine powering the creation of multiple interest-based, small groups of friends.

ASK: Are we basing quality of engagement on quantity of attendees?

AIM FOR: “Pairing of passions” among residents and staff.

IDEAL: Enable residents and/or staff to facilitate interest-based groups.

Life Enrichment Staff: From Cruise Directors to Connectors

Activity and Life Enrichment staff are usually at the center of a culture that is activity-based, and rightly so. Since they own the creation and execution of the activity calendar, these key staff members are typically responsible for driving resident engagement activities (and utilizing engagement technology).

What would happen if your community transformed this critical role in a way that fosters purposeful connections and engagement? Your job description would change dramatically. As Scott Smith asserts:

Your role as a Life Enrichment professional is not to stand in front of a group of residents and entertain them several times a day. Your role is to really understand what makes them tick and to use that to create connections between like-minded or like-interested residents.²



Why Is It Important to Change How Success Is Measured?

As you focus on creating connections, the way your success is measured must evolve. For example, how do you currently determine whether engagement activities have been successful? For many Life Enrichment professionals, the answer would be the number of residents who attended each event. When purposeful engagement is the goal, success might look different for each resident and could be judged instead on active and passionate participation in small groups focused on what's important or interesting to each elder.

Connectors will find themselves both orchestrating interactions among residents in small groups or clubs and observing and assessing each participants' engagement level. For example, a resident who is an introvert might feel overwhelmed in a group of 25 people. Instead, this resident might enjoy reading the newspaper on the porch or sitting down and watching a baseball game with one other person. The Connector who enables this form of meaningful engagement should document it and consider it a success.

What's the Value of Getting All Staff Members Involved?

The ideal environment for Connectors to thrive and add the most value is one where both residents and team members across all functions are facilitating interest-based small groups. The possibilities for creating meaningful connections expand exponentially when the staff-resident boundary is removed to enable inclusive groups that span roles and generations. For example, perhaps a

group of residents has expressed an interest in learning photography. Why not connect them with the Food Service team member who has a photography business on the side, and make it possible for this small group to meet regularly, either face-to-face or virtually, to discuss, learn, and share ideas?

How Does Engagement Technology Help Connectors Succeed?

Engagement technology can boost the Connector role from a novel idea to the norm. Once resident and staff interests are gathered and centralized in a dynamic engagement technology system, Connectors can create on-ramps for vital social connections.

Technology can be the facilitator for any event, whether it is club- or large-group based or ongoing moments of connection. In addition to aggregating interests of residents and staff, the solution's recommendation engine can use that data to suggest digital content that could be used to support discussions, group gatherings, individual engagement, or any other activity. When used in this capacity, engagement technology provides an effortless way to customize the resident experience at the individual level, making it seamless for staff and eliminating preparation, research, and content curation. This technology can offer any staff member or resident instant access to the content they need to fuel their interest-based groups.

ASK: Are we getting elders “beyond the basics”?

AIM FOR: An environment where purpose can flourish.

IDEAL: Empower residents to self-direct connections and experiences that provide meaning and purpose.



The Elder: From Person-Centered to Person-Directed

A thorough evaluation of the community for its potential to support purposeful engagement should involve a close look at the role of the elder—the person at the center of this initiative. If the goal is to go beyond basic person-centered care to person-directed care and engagement, then the elder must be in the driver’s seat directing how they spend their time and what experiences they create. In this engagement model, staff support resident autonomy by enabling resident choices and removing roadblocks. In truly knowing each resident as an individual and understanding what sparks excitement in them, the Activity/Life Enrichment team effectively supports residents as they choose what their engagement looks like. The result? Increased resident well-being.

Why Is It Important to Knock Down Barriers?

With residents directing their own connection and engagement experiences, staff should focus on eliminating historical boundaries so possibility and purpose can thrive. As Scott Smith suggests:

Not all opportunities for camaraderie must exist within the building. Look

beyond, into the community at large, to learn about things you can connect residents to. That group of three with a passion for photography—is there somewhere they can go to see an exhibit? What about taking a nature walk, armed with cameras? Or participating in an online photography class? These are the on-ramps that make connection experiences more dynamic.³

When evaluating potential connection on-ramps, look beyond the four walls of the senior living community environment. Consider the potential for small interest-based groups of residents to nurture their passions in the broader community or in the global community with online and virtual content experiences.

How Can Your Community Leverage Technology to Help Elders Own Their Engagement?

The most essential element in leveraging technology for person-directed engagement is access—elders must be empowered to take ownership of their own engagement through their personal device. It’s critical that this device be developed especially for them, with key usability features that eliminate the need for previous technology experience. A truly senior-friendly device removes a

common barrier to usage—the elder’s lack of confidence with technology—and enables them to become competent users quickly. With unrestricted access and an effective user experience, engagement technology can then function as a recommendation engine, suggesting potential friends or connections for elders, facilitating the initial outreach, and supporting ongoing interactions with content that expands the boundaries of how and where seniors nurture their interests.

As your community continues to invest in health and safety technology, it should not overlook devices that support communication, contribution, and learning. Tablets offer a foundational support tool for enabling elders to be autonomous and self-directed in their engagement.

Planning for 2021 and Beyond

COVID-19 has significantly changed daily life in senior living and care communities, both for residents and staff. Though the pandemic brought with it new challenges, it also served to highlight existing issues, such as loneliness and social isolation, that had previously remained under the radar. According to recent research from iN2L, before the pandemic, 39% of senior living residents said they were often or always lonely. Alarming, the number of residents who reported always feeling lonely spiked by 230% during the pandemic. And sadly, 50% of senior living residents surveyed said they never felt like they had any friends in their community.⁴

During the pandemic, addressing loneliness, facilitating social connections, and engaging residents with personalized and purposeful experiences became more difficult—and more critical—than ever before. While the data on the exacerbation of loneliness among residents during COVID-19 is sobering, the quick and thoughtful reactions of community staff during these challenging times has also illuminated three key opportunities. If you help your senior living community address these opportunities in its “next normal” operations, your community will gain a strong foundation for purposeful engagement.

1. Focus on Quality Individual Engagement

The pandemic has spurred a shift in mindset from a focus on passive, group-based engagement to the beginnings of personalized, person-directed engagement. Due to precautionary isolation measures, staff and residents have discovered that individual engagement is as important as group activities and engagement, and that being alone is not necessarily the same as being lonely. Whether it’s spending solitary moments in a favorite pastime or video visiting with friends and family, individual engagement—especially activities supported by technology—became a

necessity during the pandemic. Moving forward, consider incorporating individual engagement plans for each resident. Your community can base these plans on the same resident information that facilitates interest matching with peers and staff.

2. Emphasize Small Group Gatherings

Small group gatherings, whether conducted in person and safely distanced or in a virtual format, replaced the traditional large group activities of pre-pandemic times. When groups are smaller, and members have made a choice to participate, the topic can be tailored to something that interests them. As a result, engagement and connection are amplified. Evaluate how your community can use technology to expand these small groups to involve both elders and staff and to extend the experience to as many groups, or clubs, as possible.

3. Help Elders Embrace Technology

One of the more surprising revelations of the pandemic is that elders (and some staff members) are not as tech averse as once thought. When visitors were restricted for their own safety, residents quickly embraced video calls for keeping in touch with family and friends, helping to create a sense of social routine and providing essential human connection. While communities have not always had the right technology to enable these virtual connections on-demand, the pandemic has changed that. It will be important for communities to continue this tech-enabled momentum of virtual connection moving forward and consider how technology becomes a constant connective tissue in the community, not just for linking residents to outside family and friends, but to each other, their interests, and staff.



LESSONS FROM THE PANDEMIC

What We Thought

Being alone equals being isolated or being lonely.

Engagement is delivered via large group activities.

Older adults are technology averse.

What We Learned

Individual engagement is meaningful and an important driver of quality of life for elders.

Small groups, safely distanced or virtual, provide more tailored interest-based engagement.

To fill personal, unmet needs, elders will use—and embrace—technology.

Your Community's Path to Purposeful Engagement

Start evaluating your community's readiness to transition to a culture of purposeful engagement. Then consider how your current paradigm might need to shift, what tools will be needed, and what budget would support your ideal. Here are some action items to help you through the process.

- 1. Prioritize “deep knowing” of your residents and staff.** Get beyond basic life history and tap into individuals' interests, passions and aspirations.
- 2. Take stock of tools.** Evaluate current processes, strategies, strengths, and gaps for each of the opportunities discussed. For example, what tools do you have, both manual and technology-based, that can help you with deep knowing?
- 3. Begin making connections.** Try the club model idea with staff. Invite a small group of people you do not normally interact with to lunch and learn about their interests, passions, and aspirations. Consider how you can apply this approach to residents.
- 4. Support purposeful engagement by leveraging common interests.** Find out what residents and staff have in common with each other in order to orchestrate meaningful connections.
- 5. Measure success differently.** Set goals and consider alternative indications of success that are not limited to attendance numbers for group events. Consider individual resident feedback, gathered informally, through surveys, testimonials, or interviews.

While Bingo will likely always be a part of a community's program because some residents enjoy it, and themed parties will continue because we all like a big party every now and then, the lessons learned during this past year cannot be lost. Let us commit to setting our goal on purposeful engagement as we move forward, following the Pioneer Network values that remind us of the need to know each person and that community is the antidote to institutionalization. As the Pioneer Network Credo states:

Growing older presents limitless opportunities to pursue joy and meaning wherever we call community. Aging is the path to life-long learning, growth and connection regardless of changes we face. Pioneer Network is working to bury stereotypical views and combat ageism. Helping others understand and experience life in a fulfilling way creates a culture of care and support we all desire. Let's celebrate the virtues of aging together!



As the provider of the leading engagement and social connection platform for seniors, iN2L has been enriching the lives of older adults since 1999. A critical part of the experience in more than 3,700 nursing homes, assisted and independent living communities, CCRCs, life plan communities, memory care settings, and adult day programs, iN2L creates purpose, possibilities, enjoyment, and connection for hundreds of thousands of seniors. iN2L's expansive content library promotes wellness, empowerment, and engagement among older adults and is the foundation for activities that facilitate social interaction, cognitive and physical exercise and therapy, education, reminiscing, areas of interest, and memory support engagement.

SOURCES

1. Scott Smith, "Purposeful Engagement: The Challenge, the Opportunity, the Example," webinar, Pioneer Network, Culture Change in Action Series, October 22, 2020.
2. Smith, "Purposeful Engagement."
3. Smith, "Purposeful Engagement."
4. iN2L, *Bridging the Loneliness Gap Exploring Perceptions of Socialization, Engagement, and Satisfaction Among Key Senior Living Stakeholders*, Report, December 2020.