

# Resident engagement & social wellness readiness assessment

How ready is my community to put social wellness into practice?

**Social wellness means having supportive relationships, feeling connected and valued, participating in meaningful experiences, and having a sense of purpose.**

Developed from social wellness research conducted by Argentum and LifeLoop and published in a 2026 report, this assessment is designed to help you review how your community supports connection, belonging, purpose, and meaningful engagement in residents' everyday lives.

Use this assessment to evaluate how your community understands, delivers, and leverages social wellness to improve resident well-being and identify:

- What is working
- Where practices may be inconsistent
- Steps to take that can make social wellness more intentional, measurable, and actionable

Read the 2026 report



## Conduct the assessment

### Assessment instructions and scoring

For each statement, circle the response that best reflects how social wellness is reflected in your community's current practices:

**0 points:** Not yet / **1 point:** In progress / **2 points:** Yes, consistently

### Assess

First, consider how well staff understand social wellness and maintain important resident information.

**0 / 1 / 2** Our staff members understand how social wellness—including connection, belonging, purpose, meaningful engagement, and supportive relationships—affects resident health and well-being.

**0 / 1 / 2** We keep up-to-date information about each resident's interests, routines, relationships, life history, strengths, and preferences.

**0 / 1 / 2** We assess more than attendance, including relationships, participation patterns, engagement levels, changes in routine, and residents' self-reported feelings of loneliness and connection.

Your score: \_\_\_\_ / 6 (total possible)

## Plan

Next, consider how consistently staff teams translate that understanding into personalized goals, plans, and engagement approaches.

- 0 / 1 / 2** We use current information about resident's strengths, interests, and preferences to personalize community-wide programming, and to inform individual engagement plans.
- 0 / 1 / 2** Residents—and families when appropriate—are involved in setting clear, personalized goals for connection, purpose, and engagement.
- 0 / 1 / 2** Each engagement plan is shared with the care team and clearly identifies the goal, next steps, responsible team members, review date, and which changes require attention or follow-up.

**Your score:** \_\_\_\_ / 6 (total possible)

## Implement

Now, think about how consistently those plans are put into practice.

- 0 / 1 / 2** We offer multiple ways for residents to take part in community life, including group programs, one-to-one engagement, peer relationships, shared spaces, and informal interactions.
- 0 / 1 / 2** We create opportunities for residents to experience purpose, use their strengths, contribute to the community, and build relationships (e.g., leading, mentoring, teaching, volunteering, creating, supporting others).
- 0 / 1 / 2** We adapt engagement opportunities when a resident faces a barrier to participation, such as mobility limitations, cognitive or sensory needs, transportation, or lack of confidence.

**Your score:** \_\_\_\_ / 6 (total possible)

## Document, evaluate, & adjust

Then, consider how staff teams document processes, review data and outcomes, and respond to changes.

- 0 / 1 / 2** We use shared tools to consistently document meaningful interactions and track patterns or changes that may require follow-up.
- 0 / 1 / 2** Our teams have tools that make it easy to share information, follow up on needs, and make decisions about resident engagement and social wellness.
- 0 / 1 / 2** We regularly review each resident's progress toward their goals, understand barriers, and adjust the plan when needed.
- 0 / 1 / 2** We look for relationships between engagement and outcomes such as mood, memory, mobility, falls, and overall well-being.

**Your score:** \_\_\_\_ / 8 (total possible)

### Enable consistency

Lastly, consider how staff, processes, and technology support social wellness consistently.

- 0 / 1 / 2** Team members receive the training and guidance needed to understand social wellness, recognize resident needs, and incorporate those insights into their day-to-day work.
- 0 / 1 / 2** Life enrichment and clinical teams collaborate on care planning and resident support, ensuring knowledge of resident behavior and engagement can inform care decisions.
- 0 / 1 / 2** Our technology helps teams personalize engagement, keep important resident knowledge in one place, identify changes in participation, and share useful resident insights across departments or systems.
- 0 / 1 / 2** When a potential social wellness risk is identified, team members can easily share information and coordinate next steps across life enrichment, clinical, and other relevant departments.

Your score: \_\_\_\_ / 8 (total possible)

### Calculate your results

Add your scores from all five sections.

Your total score: \_\_\_\_ / 34 total points

## Understand your engagement and social wellness self-assessment score

### 0–11 points | Building the foundation

Social wellness is already happening every day, but much of its value may still be experiential, decentralized, or difficult to quantify.

Your residents are benefiting from meaningful relationships, engagement, and community. However, practices around social wellness may not yet be consistently defined, coordinated, measured, or visible across the organization. The opportunity now is to move from delivering social wellness to defining it more intentionally and creating greater visibility into its impact.

#### *Where to focus next:*

Establish a shared definition of social wellness, identify the signals and data you already capture and what indicators you may need to add, strengthen staff practices and cross-functional communication, and align leadership around the resident outcomes your engagement strategy is intended to influence.

### 12–22 points | Delivering consistently

Your organization is transitioning from delivering social wellness informally to managing and surfacing it as an intentional organizational capability.

Teams are beginning to use consistent practices, data, technology, and cross-functional collaboration to understand resident social wellness and identify opportunities for improvement. The next opportunity is to turn information into action more consistently across residents, teams, and communities.

*Where to focus next:*

Strengthen consistency across communities, connect engagement information with clinical and operational data, and identify the outcomes that can demonstrate the value of social wellness internally and externally.

**22-34 points | Improving outcomes**

Social wellness is becoming an integrated organizational capability—not simply a programming function—for understanding resident health, making decisions, and evaluating performance.

Your organization is bringing together strategy, measurement, technology, cross-functional decision-making, and outcome data to make social wellness actionable. This creates a stronger foundation for proactive resident support and for demonstrating value to leadership, prospective residents, families, healthcare partners, and other important community stakeholders.

*Where to focus next:*

Continue validating relationships between social wellness and resident well-being outcomes. Strengthen your supporting technology and operational infrastructure to expand your ability to capture resident insights that enable proactive interventions for residents.



**Turn your results into action**

Connect with LifeLoop to discuss your results and explore how your community can make social wellness more measurable, actionable, and integrated into everyday resident engagement.

➔ Visit [lifeloop.com/wellness-navigator](https://lifeloop.com/wellness-navigator) or email us at [lifeloop@lifeloop.com](mailto:lifeloop@lifeloop.com) to learn more.