



## Case Study

Ingleside

[www.inglesideonline.org](http://www.inglesideonline.org)

senior  portal

### Client

Ingleside

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### Location

Washington, DC metropolitan area

## Ingleside, a multi-site family of senior living affiliates, leverages voice technology so that no residents are left out of the conversation

### Overview

Ingleside sought a resident engagement platform to disseminate timely and accurate information, unify messaging and streamline partnerships. By working collaboratively with Senior Portal and by integrating voice technology, this multi-site family of senior living affiliates was able to provide access for all residents, including those with mobility, dexterity, vision and/or cognitive challenges. The Ingleside staff and residents were invested in the success of the portal, and their requests were accommodated with customized technology, resulting in an engaged, connected community and an adoption rate of over 75%.

### Client Profile

Ingleside is an organization of people imbued with a spirit of giving. As the not-for-profit parent of the Ingleside family of communities and affiliates, they lead Ingleside at Rock Creek, Westminster at Lake Ridge, Ingleside at King Farm, Westminster Ingleside Group, the Westminster Ingleside Foundation, and Ingleside at Home. All of their programs and services provide exceptional experiences for the older adults they serve, as well as employees, volunteers and partners.

## The Challenge

To better satisfy the needs of staff and residents, Ingleside embarked upon a search for a solution to replace their resident website, which wasn't dynamic enough. At the time, residents and staff could see information on events and dining, but they wanted more. So, the Ingleside team, including their IT committees, began by gathering requirements and then bundled this input into a consolidated document. High on the list was the need for a customizable system, especially since Ingleside is a multi-site family of unique communities.

As an independent, not-for-profit organization, Ingleside provides management and strategic leadership for three of the Washington, DC metropolitan area's premier Life Plan Communities: Ingleside at Rock Creek, which is nestled alongside Washington, DC's beautiful, unspoiled Rock Creek Park; Westminster at Lake Ridge, which is set against the natural forested beauty of Northern Virginia; and Ingleside at King Farm, which is central to the award-winning intergenerational King Farm development near Washington, DC. In addition, Ingleside at Home is dedicated to providing high-quality personal and customized services for clients who don't live on campus.

Resident satisfaction is perhaps the most important function of the Ingleside partnership with its residents. Pride is taken in developing trust based on transparency and interaction with residents (who have a median age of over 85), and this core value played into Ingleside's decision to choose Senior Portal as their new resident engagement platform.

"We selected Senior Portal because they said, 'Yes' to basically everything we wanted, and they offered a personal touch" explains Dusanka Delovska-Trajkova, Chief Information Officer at Ingleside. "The Senior Portal team came to each of our campuses, which was important to us. They got to know each of our unique communities, and they took the time to understand our current procedures and our needs for the future."

## The Solution

In terms of specific goals, the Ingleside staff was looking to unify messaging and disseminate timely, accurate information. Partnerships needed to be considered as well.

Delovska-Trajkova describes, "We needed to interface with partners. As you can imagine, senior living is a fairly complex environment. We have dining, maintenance

and healthcare partners. Each of our residents can travel from one level of care to another through the whole continuum. As they do so, it was very important that we anticipate their needs, and we wanted their level of access to travel with them. Thanks to Senior Portal, our residents don't lose anything as they transition to another level of care."



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Dusanka Delovska-Trajkova, Chief Information Officer,  
Ingleside

After about a year with the new portal, resident surveys were conducted and indicated a high degree of satisfaction among those who were using the portal. However, it was revealed that about 30 percent of the community wasn't using the portal due to challenges with vision, mobility or dexterity or simply due to discomfort with technology. Reflecting on their mission to create diverse and enriched opportunities for seniors, Ingleside, and their accessibility committees, wanted to address this gap. The Senior Portal team thus suggested the use of voice technology after having had success at other communities.

Implementation was piloted with 50 residents, and specific goals were identified for the ensuing six months:

1. To get acceptance by residents; specifically, to get 90% of the pilot group to use Alexa daily
2. To add core skills, which meant adjusting certain workflows
3. To improve features based on resident and staff input as captured via monthly meetings
4. To create a wish list of additional features along with a corresponding timeline

adoption rate of over

**75%**

bistro reservations

**400**

per month

The results exceeded expectations. “What surprised us was how fast our initial group implemented the voice technology, how fast they wanted to move forward and how fast they wanted to add features, because they saw how easy the interaction is. They don’t need computers. They don’t need logins. They just need to speak,” says Delovska-Trajkova.

A set of goals was then developed for the next six months:

1. To add more complicated features, such as dining reservations, event registrations and work orders
2. To evaluate ROI and resident satisfaction
3. To create a wish list of additional features along with a corresponding timeline
4. To plan expansion of the pilot group to additional residents

Ingleside also had an overarching goal. Delovska-Trajkova explains, “We were trying to understand how voice technology can contribute to the well-being of residents. We wanted to know how this technology could help give residents control and independence, thereby providing effective means to live their lives more fully. We wanted to know how this technology could contribute to a greater sense of connectedness to their families, particularly younger generations, thus creating meaningful socialization that contributes to the well-being and wellness of our residents.”

Based on initial findings, Ingleside’s personal trainers, or “wellness managers,” began to collaborate with Senior Portal to incorporate the physical dimensions of wellness. The desire was to log the activities that residents participate in and evaluate how they fulfill the various dimensions of wellness. “Senior Portal was very receptive, and they customized our portal based on our needs. We are working to tie in the residents’ gadgets and wearables,” Delovska-Trajkova explains. “For example, we could measure steps and load that information into the portal. This would give our residents information about the positive effects of their walking.”

In addition, the Life Enrichment staff invited Alexa into daily activities on campus to play stories and music and to tell jokes. They enjoy the ease of use, especially the ability to quickly change subjects, and they appreciate that this technology has cut their preparation time.

Another area of interest for Ingleside was how voice technology could possibly benefit seniors with cognitive impairments such as dementia.

A particular group of residents therefore created a program whereby they use Echos to play music preferred by residents with such impairments. The music, which was selected by working hand-in-hand with the residents’ family members, has been used as a soothing device with very positive results thus far.

Ingleside worked with Senior Portal to tackle events as well. After all, one of their campuses alone has over 400 activities a month from which people can choose, and managing all of that had, of course, been quite challenging. Delovska-Trajkova describes, “We had boards with multiple sign-up sheets, and we had a lottery system in place, because some events were limited in terms of the number of people who could participate. If people cancelled, it was very difficult to keep track.”

In the beginning, Ingleside allowed both options for event registration and cancellation – paper-based and computerized – but they soon decided to “pull off the Band-Aid,” as Delovska-Trajkova described, by implementing two kiosks next to their life enrichment office. The staff and IT committees were instrumental in helping residents sign up for events online, and, after one month, two of their campuses were paperless. The third campus is following suit. According to Delovska-Trajkova, “Nowadays, nobody here mentions sign-up sheets. Nobody misses them.”

A highly regarded dining reservation system similar to OpenTable has also been implemented via Senior Portal, and the work order system has been interfaced. Now, when residents place a maintenance order, it goes directly to the system that Ingleside’s team uses. A technician is assigned, saving several steps as compared to the previous method of manual entry. Notes allow residents to see what’s being done, thereby providing transparency and improved workflow.

## The Results

The experience at Ingleside demonstrates the profound benefits that result when a technology company and Life Plan Communities take a co-development approach. Technology can be enchanting, but when communities are treated as co-development partners, when the technology is customizable, and when there’s mutual respect and a common goal, true and meaningful success will follow. Residents and staff who’ve played a role in the design of their portal will be much more likely to adopt it, enjoy it and benefit from it, as has been the case at Ingleside.



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