



Inspiring Vitality Presents this confidential, proprietary
Wellness Framework Proposal for Harmony Senior Services
August 6, 2019

Overview and Objectives

Expanding Harmony Senior Service's business strategy to include a visible, content-rich, and generation-spanning wellness program is a natural expansion of your current wellness branding of "Energy of Life". Taking your wellness vision to the next level will showcase the priority of providing a vibrant culture and lifestyle for residents while at the same time earning a reputation as a preferred employer with a supportive environment for employees. The setting of senior living communities uniquely positions Harmony for the powerful synergy of a combined strategy of addressing the well-being of residents, their families, and employees.

A wellness focus for *residents* is a powerful value-add to your service model and marketing messages. An *employee* wellness focus benefits not only the employees themselves but the company by attracting talent, decreasing absenteeism, and increasing loyalty. A wellness model that addresses residents and employees *together* capitalizes on the natural, reciprocal affection that develops between residents and employees at senior living communities. Including *families* in the target audience provides another value-add. Because the senior living business model includes significant interaction with families in addition to the residents themselves, Harmony can serve as a natural facilitator of education and inspiration for generational relationships and wellness throughout life stages. In addition, due to their exposure to the ailments of older adults, senior living employees and family members are often more receptive than the general population that their habits today will influence their future wellness.

Inspiring Vitality has specialized experience to be a preferred partner in achieving Harmony's objectives as the only wellness provider with expertise and credentials in wellness for both the working population and the older adult population, and a proprietary wellness model that addresses both populations together. *Inspiring Vitality* is committed to excellence in program quality, business practices, and customer service.

***Inspiring Vitality's* Wellness Model**

Inspiring Vitality's wellness model is based on lifestyle habits that impact a "Strong Body, Sharp Brain, and Endless Energy" at the same time. We also utilize tracks for "Never Too Early" and "Never Too Late" to address all age ranges and include a foundational four-level fitness platform for different abilities and interest levels. The model is designed to be effective, as well as seamless and collaborative. Our module approach will provide options for customization plus ease of implementation that will be welcome to your on-site leadership.

Strong Body, Sharp Brain, Endless Energy

Rather than using a long list of wellness dimensions, our model consolidates numerous important wellness focus areas into three categories:

- **Strong Body** includes areas such as fitness, nutrition, weight loss, cholesterol, blood pressure, mobility, and fall prevention.
- **Sharp Brain** includes areas such as brain fitness, processing speed and mental clarity, memory enhancement, dementia risk reduction and symptom management, healthy hearing, vocational wellness/purposeful pursuits, intellectual wellness/mental stimulation, and social interaction.
- **Endless Energy** includes areas such as healthy sleep habits, fatigue management, stress management, and emotional wellness.

Educational Modules and Resource Library for Strong Body, Sharp Brain, Endless Energy

Programming and educational materials are available for the following core wellness habits.

Additional content is constantly being developed and custom topics are available as well.

Master your mindset	Cardiovascular exercise
Strength training exercise	Move more during the day
Don't smoke	Eat more superfoods and less processed foods
Maintain a healthy weight	Resist fad diet
Drink lots of water	Get enough sleep
Manage stress	Maintain a meaningful social life and/or family life
Have purposeful pursuits	Always keep learning
Protect your healthy hearing	Include change, surprise, and zest in daily life

It's Never TOO EARLY or TOO LATE to Improve Your Wellness

It's never too early and it's never too late to make small changes that will yield meaningful results in your overall health, wellness, and quality of life. The Never Too Early, Never Too Late model includes:

The Never Too Early Track is generally focused on prevention and the opportunity for working-age adults to build good habits early in life to maximize their current wellness and also to prevent health issues later. The question/answer of: *"What type of 85-year-old do you want to be? Because you're working on it right now."* is *Inspiring Vitality's* signature self-reflection prompt for the Never Too Early track. Fitness recommendations are more rigorous for the Never Too Early Track, appropriate for a higher physical capacity, regardless of age.

The Never Too Late Track focuses on the motivating message that the human body and brain can respond to lifestyle change efforts even at advanced age. Strategies are provided for older adults to positively impact their wellness, mobility, and quality of life regardless of their current physical and/or cognitive challenges.

Foundational FOUR-Level Fitness Platform

Inspiring Vitality operates with a foundational four-level fitness platform that includes tracks for Never Too Early and Never Too Late. We place a high priority on physical exercise with the appropriate level and content for each individual for two important reasons: 1. Exercise

delivers more benefits in more areas of wellness than any other single action we can take. 2. Maintaining or improving physical mobility enhances an individual's ability to participate in and enjoy everything else life has to offer. Each level includes appropriate fitness assessments as well as instructions for individual and group exercise, as well as caregiver-resident or family workouts. Video tutorials will be located in the resource library.

The Four Levels

Level One: Just MOVE!

Level Two: 20-minute No Equipment Exercise Plan

Level Three: 40-minute Minimal Equipment Exercise Plan

Level Four: 60-minute+ Full-Fledged Exercise Plan

Inspiring Vitality's Certification Distinction

Inspiring Vitality's certification distinction allows Harmony to attach a prestige marketing advantage and at the same time provide a gatekeeping mechanism for implementation among locations. The scope and delivery method of the certification can be determined based on level of care and type of staff who will be involved, ie nursing, caregivers, fitness, activity directors, etc.) and realistic expectations for training time.

Sample Program Components

- 12-month community-wide action plan for programming at each level of living
- *Inspiring Vitality* "Wellness-In-A-Box" Kit for individual, family, or small group use: includes congratulatory certificate for ***Inspiring Vitality*** in each other. A copy of my book, *BOOM: 6 Steps to a Longer, Healthier Life*, the companion action guide, wellness assessment instructions and forms, exercise bands and tubing, *Inspiring Vitality* wellness-themed playing cards and/or flash cards, checklists, goal sheets, other items to be determined. The Wellness-in-a-Box Kit is a key program component available because it is a physical, tangible item that staff, caregivers, clients, and families can all utilize in the home setting. Habit change and intergenerational synergies depend on time spent together, in-person; therefore it is important that our wellness delivery methods leverage the facetime that residents, families, and staff or caregivers have together. In addition, older adults often prefer hard-copy materials over electronic materials.
- Online Resource Library
- Monthly educational webinar, electronic newsletter, video tips for families
- Quarterly Participation Reach Tally and Celebration Video messages profiling locations or client/caregiver/families with their story of "*How I'm Inspiring Vitality!*"
- Specialty 4-week wellness challenges or online classes
- Group wellness coaching
- One-on-one wellness coaching
- Leadership Staff monthly Zoom strategy session (can be offered at multiple times)
- *Inspiring Vitality* Champion Team
We will reward and leverage team members who are enthusiastic about personal wellness and are interested in encouraging others to participate by inviting them to be part of a Champion Team. The purpose of membership on the team will be to help promote the

Inspiring Vitality Program to other residents and co-workers and encourage participation. They'll receive t-shirts, other gifts, and special offers.

- Inter-Generational Wellness Discussion Series and “Being Mortal” book study
A unique offering of Inspiring Vitality is a book study group for *Being Mortal* along with a facilitated inter-generational discussion group, primarily for residents and family members. This important opportunity teaches families how to have proactive conversations with their loved ones to plan for medical and lifestyle decisions that may need to be made in the future should a loved one not be able to make these decisions for themselves.
- Inspiring Vitality On-going Support System
- Program evaluation measures and annual reporting

Contract Model

Once the proposal components are finalized, a one-year contract will be signed. The contract automatically renews on the one-year anniversary unless canceled 30 days prior to renewal date. Initial strategic set up fee is due at time of contract signing. Additional fees will be due at time incurred. Once program components are available for use, payment will commence to the monthly fee per eligible user, per month. Eligible users are defined as the total number of employee plus residents. Family members of the client will have free access to modules agreed upon as Harmony’s gift to them.

Overall Investment Model		
Item	Description	Fee Structure
Strategic Set Up Fee	Intellectual property for strategy and Implementation Plan, Initial development/customization of materials	Annual Set Up Fee (Based on Options Selected)
Pilot Period Fees	A pre-determined period with the focus on development and usage by a limited number of pilot sites.	Flat Monthly Fee for a limited number of months during pilot period
Inspiring Vitality Monthly Usage Fee	Ongoing Program Administration, Communication , Implementation, Reporting	Monthly Fee Per total eligible employees and clients per month (Based on Options selected)
Travel	Transportation and lodging for in-person events	TBD; may be included in other fee categories
Outside of Defined Scope	Work requested outside the scope of our agreement	As negotiated
Materials	At your discretion for hard copy newsletters, wellness in a box components, promotional items such as t-shirts and other logo-items	TBD; some items may be included in other fee categories.

The contents of this document are designed as a starting point for brainstorming and customization to create the perfect solution for Harmony Senior Services. Thank you for the opportunity.