



SALES AND MARKETING ROUNDTABLE #280: Tracking Well-Being - Soft Measures for Hard-Wired Outcomes with Dr. Kathleen Potempa

Thank you to everyone who attended our latest Sales and Marketing Roundtable! To provide anonymity during the Roundtable discussion, participants and their communities will not be identified.

ABOUT OUR GUEST

This week on Varsity's Roundtable, we were joined by Dr. Kathleen Potempa, founder of HealthyLifetime, an evidence-based independent-living program developed by the University of Michigan School of Nursing that helps older adults maintain their independence longer.

Dr. Potempa led an engaging discussion on *"Tracking 'Well-Being': Soft measures for hard-wired outcomes."* The presentation explored how to measure well being and took a closer look at HealthyLifetime's Independent Living Index.



**"Soft measures reveal risks before traditional medical tests do.
They let us step in early, improve lives, and keep people
independent longer." (Dr. Kathleen Potempa)**



VarsityBranding.com

FRESH PERSPECTIVES

- **SOFT MEASURES REVEAL HIDDEN RISK** – Self-reported well-being factors like purpose, resilience, and life satisfaction can uncover “insidious risks” that traditional medical tests miss—allowing communities to intervene before decline begins.
- **WELL-BEING IS THE NEW LONGEVITY STRATEGY** – Decades of research show that emotional health, social connection, and resilience aren’t just feel-good factors—they’re strong predictors of longevity, independence, and reduced mortality.
- **RESILIENCE BUILDS REAL STRENGTH** – Mental and emotional resilience create both psychological and physical benefits, helping older adults think clearly, make healthier choices, and stay “heartier” over time.
- **CONNECTION IS MEDICINE** – Social engagement literally strengthens the body. Meaningful relationships help regulate stress, boost immunity, and protect against decline—proving that community is a biological need, not a luxury.
- **TRACKING WELL-BEING DRIVES ACTION** – HealthyLifetime’s Independent Living Index turns soft data into actionable insight. It helps communities measure risk, track improvement, and show tangible outcomes that resonate with residents and families.
- **REVENTION IS THE FUTURE OF AGING** – The shift from treating illness to preventing decline is underway. HealthyLifetime’s expansion as an independent company signals a new era where aging well means living longer, healthier, and more independently.

LINKS & CONTACT INFO

Dr. Kathleen Potempa ([Linkedin](#))

HealthyLifetime ([website](#))

HealthLifetime research ([web page](#))

Stop by and meet the HealthyLifetime team at LeadingAge's Annual Meeting in Boston, booth 617 (adjacent the CHEERS bar in the Expo Hall).

COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, October 30 at noon ET, 11 a.m. CT and 9 a.m. PT. We'll be joined by Kiera DesChamps from KD Consulting. Kiera will be sharing tips and insight from her new book "After the Tour," in which she reveals the overlooked steps and cues that truly drive occupancy or purchase: emotional trust, logistical support and guided next steps.

NEW ON VARSITY'S PODCAST, ROUNDTABLE TALK

Inventing isn't just for the young—or the tech-savvy. Brian Fried, accomplished inventor, author, and founder and CEO of Inventor Smart, proves that creativity and innovation can thrive at any age. With more than 15 patents and nearly 20 years of experience coaching inventors, Brian has built a career helping people turn everyday ideas into real-world success stories.

In this episode of Roundtable Talk, Brian shares what inspires older adults to pursue invention later in life and the satisfaction that comes from seeing their ideas come to life. He discusses the biggest myths about inventing, the power of simple problem-solving, and how digital tools like AI and 3D printing are revolutionizing the process. Check out the [episode here](#) on the Varsity website!





HealthyLifetime®
A Breakthrough in Independent Aging

Tracking 'Well-Being'

'Soft' Measures with Hard – Wired Outcomes

Date: October 23, 2025
Presenter: Dr. Kathleen Potempa, CEO of HealthyLifetime



The HealthyLifetime program grew out of years of research at the University of Michigan, where the team realized they could do more than just help people manage chronic illnesses, they could actually change the trajectory of aging itself. The goal became not simply to treat disease, but to help people live longer, better lives by staying independent, active, and engaged as they age.

The program has now been approved to spin out from the university as its own company, with Gene Huang stepping in as the first president and CEO. Gene brings deep experience in healthcare and business, including managing Medicare Advantage plans and working on national post-acute care programs.

The focus of today's discussion is on tracking well-being. Over the years, the team has learned that "soft measures"—things like self-reported happiness, sense of purpose, and overall life satisfaction—are just as important as traditional "hard measures" like lab tests or scans. In fact, decades of research now show strong links between these self-reported well-being indicators and real, measurable health outcomes.

What Is Well-Being?

A state of being encompassing positive physical, social, and emotional health with life satisfaction and sense of purpose.



Well-being isn't just about feeling good, it's a whole state of being that combines physical, social, and emotional health. It's tied to how satisfied people feel with their lives and how much purpose they have. This idea isn't new; organizations like the World Health Organization and others have long recognized well-being as a key part of living a positive, fulfilling life.

Common Ways to Measure Well-Being

- Self-reported Perceived Health
- Quality of Life
- Social Engagement and Support
- Emotional – Anxiety, Stress
- Resilience
- Life Satisfaction



Well-being can actually be measured in a variety of meaningful ways. Some are based on how people perceive their own health or rate their quality of life, things that might sound subjective but are deeply insightful. Measures like social engagement, emotional health, and levels of stress or anxiety all play a part.

Resilience, in particular, has gained a lot of attention in recent years, not just as a buzzword but as something with real psychological and biological grounding. Together, these factors—life satisfaction, social connection, emotional stability, and resilience—don't just make people feel better; they're strong predictors of how long, healthy, and independently someone can live.

Based on Decades of Research

These measures (and others) tied to health and longevity and conversely, all cause morbidity and mortality.



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The connection between well-being and health isn't based on just one or two studies—it's been researched for decades. These measures consistently show strong links to longevity and overall health, as well as to the risks of illness and even mortality.

What's fascinating is that many of these well-being factors are actually hardwired into the brain, shaping how people think, feel, and respond to life. The upcoming discussion dives into some of these studies to show just how powerful the mind-body connection really is.



HR – Quality Of Life

- 20,000 people aged 65 - 98 studied over 5 years
- HR-Q of L **inversely related to all-cause mortality** among **initially healthy** older people



Phyo, A. Z. Z. et. al. (2021). Health-related quality of life and all-cause mortality among older healthy individuals in Australia and the United States: A prospective cohort study. *Quality of Life Research*, 30(4), 1037–1048.

Health-related quality of life has been studied extensively, and the findings are pretty remarkable. In one large study of 20,000 adults between the ages of 65 and 98, tracked over five years, researchers found that those who rated their quality of life higher were significantly less likely to die from any cause. In other words, feeling good about your health and life wasn't just a nice bonus—it was one of the strongest predictors of staying healthy and living longer.



Resilience

Metanalysis of 21 studies in people 60 years and over

Resilience acts as a protective factor against psychological and physical adversity

Under-scored need for resilience-enhancing interventions



Trică, A. et. al (2024). Resilience and successful aging: A systematic review and meta-analysis. *Acta Psychologica*, 248, 104357.

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Resilience has become a big focus in aging research, and for good reason. A meta-analysis of 21 studies involving people over 60 found that resilience serves as a powerful buffer against both psychological and physical adversity. It's more than just mental toughness; it's a quality that helps people adapt, problem-solve, and make healthy decisions as they face life's challenges.

What's especially interesting is that resilience has both psychological and physical dimensions, it helps keep people not just mentally strong but physically "heartier" over time. The evidence is strong enough that researchers are now emphasizing the importance of resilience-building interventions as a key part of healthy aging.

Social Support - Psychobiology

23 meta-analyses 1994-2021, 1450
Million participants

Face of Loved Ones is 'Stress
Buffering'

Better regulates autonomic nervous
system responses

Improves immune system



Vila, J. (2021). Social support and longevity: meta-analysis-based evidence and psychobiological mechanisms. *Frontiers in Psychology*, 12, 717164.

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Social support isn't just emotionally comforting, it's biologically powerful. Across 23 meta-analyses spanning from 1994 to 2021 and involving more than 400 million participants, researchers found that human connection plays a crucial role in how our bodies handle stress.

Seeing familiar, loving faces and feeling connected to a community act as natural stress buffers. This kind of social interaction helps regulate the body's autonomic nervous system—the one that controls our “fight or flight” response—keeping it balanced even in tough situations. Strong social support also boosts immune function and protects against the harmful physical effects of stress, like inflammation and arterial damage. In short, meaningful relationships don't just make people feel better—they help them *stay* healthier.



Self-rated Health

1008 70 – year olds followed over 27 years

8-fold *better predictor* of all-cause mortality than objective health measures in short term (5 years)

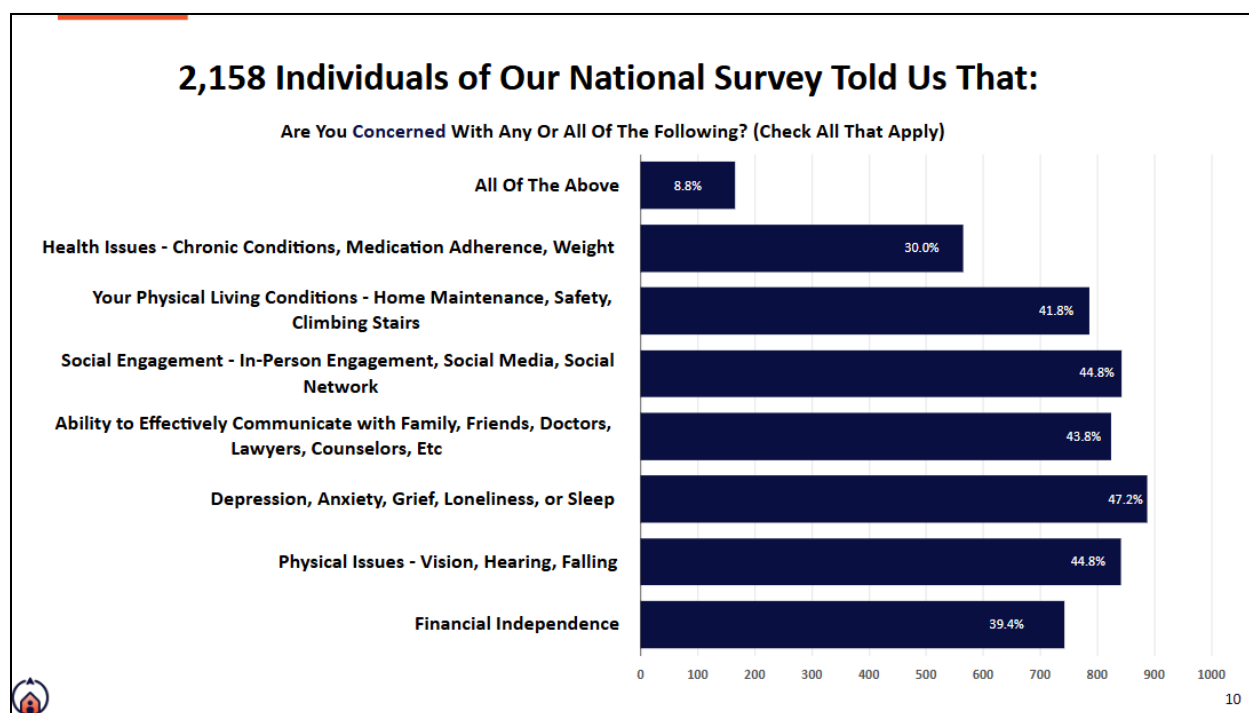
4-fold *better predictor* of all-cause mortality than objective health measures in long-term (10 years)



Wuorela, M. Et. Al. (2020). Self-rated Health And Objective Health Status As Predictors Of All-cause Mortality Among Older People: A Prospective Study With A 5-, 10-, And 27-year Follow-up. BMC Geriatrics, 20(1), 120. 8

One of the most surprising findings in well-being research comes from studies on self-rated health. In a long-term study that followed people over 70 for 27 years, researchers discovered that how someone *feels* about their own health is actually a much stronger predictor of longevity than medical numbers like blood pressure, blood sugar, or A1C.

In fact, self-rated health was eight times more accurate than those objective measures at predicting mortality over the first five years, and still four times better over ten years. It's a powerful reminder that personal perception of health isn't just a feeling, it's a meaningful reflection of overall well-being and a strong signal of future outcomes.



When HealthyLifetime conducted a market survey with more than 2,100 participants, the results challenged some common assumptions about aging. Many might expect older adults to prioritize things like managing chronic conditions, taking medications, or maintaining a healthy weight, but that wasn't the case.

What mattered most were the "soft" aspects of life. About 45% of respondents said social engagement—staying connected in person and maintaining strong networks—was a top concern. Just as important were the ability to communicate effectively with family, friends, and healthcare providers, along with emotional well-being factors like loneliness, anxiety, and depression.

Physical concerns such as vision, hearing, and fall prevention ranked higher than chronic diseases, while financial independence was important but still secondary to social and emotional needs. These insights reinforced for the HealthyLifetime team that well-being, as defined by individuals themselves, is far broader than traditional health metrics—it's about connection, communication, and emotional fulfillment.

How We Measure Well-Being And Other Factors

We use **the** ten factors science ties **to...**

- Long-term health;
- Functioning;
- And independence.



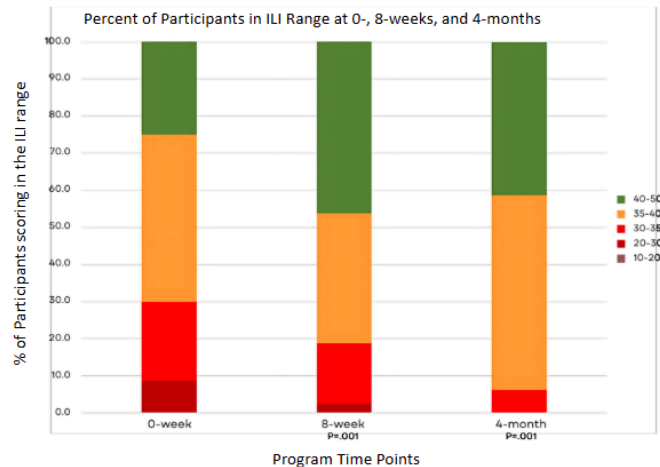
At HealthyLifetime, the focus is on putting all of this research into practice. The program intentionally incorporates well-being measures—like emotional health, social engagement, and resilience—alongside traditional health indicators. The idea is to take what science has shown about long-term health and functioning and apply it in ways that truly help people stay active, capable, and self-sufficient as they age.

Everything the team does is driven by one overarching goal: helping people maintain their independence for as long as possible.

The Independent Living Index®



- ***Represents risk factors (including well-being measures)*** which impact long-term functioning and independence.
- Evaluates overall risk level and ***shows progress in proportion at various risk levels over time.***
- Accounts for individual differences in the individuals progress ***based on their goals and issues.***
- Provides an ***aggregate score of all residents*** and shows their progress over time.



HealthyLifetime developed what's called the Independent Living Index, a comprehensive measure that brings together both traditional health factors and the softer well-being indicators that influence long-term functioning and independence. This index gives each participant an aggregate score and allows the team to track how individuals—and entire groups—are progressing over time.

The goal is to identify who may be at higher risk of losing independence and to measure how effective different interventions are in reducing that risk. The index combines self-reported well-being measures with health habits, creating a more complete picture of each person's situation. It also accounts for personal goals and differences, so progress can be tracked both at the group level and for each individual.

When participants go through HealthyLifetime's eight-week program, their risk levels—categorized as high (red), moderate (yellow), or low (green)—shift noticeably. The data show that even months after the intervention ends, participants continue to maintain or further improve their independence. That lasting impact comes from the program's cognitive and psychological methods, which help people think more clearly, problem-solve effectively, and make better day-to-day decisions about their health and lifestyle.

Why Should We Care?

Many individuals in Independent Living orgs may now be at risk for decline **BUT** are **presumed** living well independently.

The **Longitudinal VA Study*** reported in July 2023 showed that improving the self-reported issues will significantly impact longevity, independence, and health.

Leaders in the industry estimated cost savings per year if we improve factors.



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Soft measures might sound intangible, but they're powerful predictors of real outcomes—things like loss of independence, declining function, and overall morbidity or mortality. In other words, they can reveal who's at risk long before medical problems become visible.

Even in senior living communities, residents may appear independent on the surface but could still be quietly declining. Research backs this up. A large longitudinal study from the Veterans Administration found that improvements in self-reported well-being factors—many of the same ones HealthyLifetime tracks—had a significant impact on longevity, independence, and overall health.

HealthyLifetime studies ten such factors, while the VA study focused on eight, with considerable overlap between the two. When industry leaders in senior living were asked to estimate potential savings from improving these “soft” areas, the results pointed to not just better quality of life, but meaningful cost reductions as well—proving that focusing on well-being pays off in every sense.

If We Extend Years of Independence: How Much Can We Save?

Number of Factors Improved	Gained Years of Independence*	Cost Savings Per Person**
1 Factor	3-5 Years	\$56,000 - \$70,000
2 Factors	8 Years	\$128,000 - \$160,000
3 Factors	12.6 Years	\$201,600 - \$252,000
8 Factors	20+ Years	\$320,000 - \$400,000

*2023 Report using data from Veterans Affairs Million Veteran Program on >700,000 veterans aged 40-99

**CCRC reported data



The VA's massive longitudinal study—tracking more than 700,000 veterans aged 40 to 99 over two decades—clearly demonstrated how powerful these well-being factors are. For every single factor that improved, participants gained an additional three to five years of independence. Improving just two factors extended independence by around eight years, while improving all eight led to an incredible 20-plus years of added health, high functioning, and independence.

When senior living leaders looked at these results, they estimated that even modest improvements could translate into huge financial benefits—about \$56,000 to \$70,000 in savings per person per year. These savings weren't just from reduced medical costs, but also from fewer support services like in-home care, extra equipment, or additional staff assistance.

The takeaway is striking: enhancing just a few well-being factors doesn't only help people live better and longer—it can also dramatically reduce the costs associated with aging and long-term care.



Value Proposition Of Soft Measure Tracking

- *'Soft measures' show insidious risk* – when interventions can have short- and long-term benefit to members and big cost savings for the organization
- *Medical indices come 'late'* – when members at higher risk and interventions are most costly



The real value of tracking soft measures lies in their ability to reveal risks *before* traditional medical signs appear. Someone might look perfectly healthy based on lab results like A1C or blood pressure, but their self-reported well-being can uncover subtle, underlying issues—what Dr. Potempa calls “insidious risk.”

By identifying these early warning signs, organizations can step in sooner with interventions that not only improve quality of life but also deliver meaningful cost savings. In contrast, medical indicators often show up later, when chronic conditions or acute problems have already developed, making care more complex and expensive.

In short, soft measures give communities and care organizations a head start. They make it possible to detect decline early, take preventive action, and keep people healthier and independent for much longer, all while reducing long-term costs.

Value Proposition For *Members And Their Families*

Priceless!



For individuals and their families, the value of these soft measures goes far beyond dollars and data, it's truly priceless. The ultimate benefit is a longer, healthier, and more fulfilling life. It means being able to stay at home, remain close to loved ones, and continue doing the things that bring joy and purpose.

At its core, the work at HealthyLifetime isn't just about extending years, it's about improving the quality of those years, helping people live independently, vibrantly, and meaningfully for as long as possible.

QUESTIONS

DO YOU THINK THE STRONG LINK BETWEEN SELF-RATED HEALTH AND LONGEVITY COMES DOWN TO MINDSET—LIKE HAVING A POSITIVE MENTAL ATTITUDE—OR IS IT MORE ABOUT PEOPLE'S DEEP AWARENESS OF WHAT'S HAPPENING INSIDE THEIR OWN BODIES?

A positive attitude definitely helps, but self-rated health goes deeper than that. It's really about how a person interprets what's happening within their whole self—physically, emotionally, and mentally. It reflects an inner understanding of one's overall well-being, not just optimism.

HAVE YOU SEEN EXAMPLES OF PEOPLE OR ORGANIZATIONS PUTTING THIS KIND OF PROGRAM INTO PRACTICE AND ACTUALLY SEEING THE BENEFITS FIRSTHAND?

Yes, definitely. The Independent Living Risk Assessment has already been used successfully with organizations like CCRCs and CCHs to help them understand and target risk within their communities. By identifying where residents may be most vulnerable, these organizations can better allocate resources and tailor their support.

When paired with HealthyLifetime's coaching-based interventions, participants consistently show improvements in functioning and overall well-being. Many communities also build on this foundation by adding their own programs, creating a comprehensive approach that keeps residents healthier and more independent over time.

HAVE YOU TALKED WITH MARKETING TEAMS THAT ARE USING THESE WELL-BEING MEASURES TO HELP TELL THEIR COMMUNITY'S STORY AND SHOW HOW THEY'RE IMPROVING RESIDENTS' LIVES?

Yes, many communities are already incorporating these softer well-being measures into their storytelling. At HealthyLifetime, the focus is on ten longevity-related factors, including things like exercise, diet, sleep, alcohol use, and smoking—alongside the softer measures tied to emotional and social well-being.

What really matters, though, is helping people *improve* on these risk factors and maintain that positive outlook over time. These measures don't just reflect current well-being—they predict long-term outcomes. That's why active interventions, like HealthyLifetime's program, are so valuable. They help individuals build healthier habits, foster a stronger

mindset, and ultimately create communities that thrive longer, function better, and enjoy a higher quality of life.

WHAT DOES THE FUTURE HOLD FOR HEALTHYLIFETIME?

The future for HealthyLifetime is all about growth and impact. Spinning out from the University of Michigan allows the team to reach more communities faster and expand their proven model nationwide. They see big opportunities to partner with PACE programs and the long-term care insurance industry to help people stay independent longer and reduce costs.

Ultimately, the focus is shifting from treating illness to preventing decline—aligning with what 93% of older adults say they want most: to live independently. HealthyLifetime's next chapter is about helping more people and communities achieve exactly that.