



SENIOR LIVING SYMPOSIUM

March 31, 2026

Four Points by Sheraton, Norwood MA

8:00AM- 8:30AM - Registration & Breakfast

8:30AM - 8:45AM | Opening Remarks

Elissa Sherman (*LeadingAge MA*) & Keith Robertson (*Ziegler*)

8:45AM – 10:15AM | The State of Senior Living & Senior Capital Markets

This opening session aims to provide a macro-overview of the state of the not-for-profit senior living & care sector. Topics covered will include workforce trends, sector growth, diversification of services, peer best practices and innovative technology solutions among others. Time will also be spent discussing the economic backdrop and current capital lending environment. This session will provide needed education and research for leadership teams as they think about their future strategic direction.

Speakers: Dan Hermann, Keith Robertson, Katelyn McCauley (*Ziegler*)

10:15AM - 10:45AM Morning Networking Break

10:45AM - 11:45AM | Financing the Future of Long-Term Services and Supports

The cost of long-term services and supports (LTSS) has been structurally unsustainable for decades, placing increasing strain on individuals, families, providers, and public systems. With cuts to federal Medicaid funding looming while the population in need of care continues to expand, states including Massachusetts are examining alternative financing strategies. This session reviews findings from the 2025 LTSS Feasibility Study commissioned by the Massachusetts Executive Office of Health and Human Services and explores tradeoffs among access, cost management, sustainability, and out-of-pocket exposure. The discussion considers what these realities mean for providers navigating ongoing financial pressure.

Panelists: Marc A. Cohen, PhD (*LeadingAge LTSS Center at UMass Boston*), Katherine Howitt (*Blue Cross Blue Shield of Massachusetts Foundation*), Bree Bernat Shems, MBA (*Executive Office of Aging and Independence*)

11:45AM - 12:45PM - Lunch

12:45 PM – 1:45 PM | The System Under Pressure: Innovation and Shared Solutions as Federal Support Declines

With the Commonwealth expected to lose \$3.5 billion annually in federal funding when the OBBB is fully implemented, and with increasing coverage loss anticipated, creative system-level responses will be necessary. This forward-looking discussion explores how providers and policymakers can respond to shrinking resources amid rising need. The conversation centers on innovation, shared problem-solving, and strategic adaptation to sustain mission-driven services in a constrained funding environment.

Facilitator: Adam Scott (*Hebrew Senior Life*)

Speakers: Amy Rosenthal (*Executive Office of Health and Human Services*), Robin Lipson (*Executive Office of Aging and Independence*), Valerie Fleishman (*Massachusetts Health & Hospital Association*), Keely Benson (*Massachusetts eHealth Institute*), Adam Scott (*Hebrew Senior Life*)

1:45 PM - 2:00 PM Afternoon Break

2:00 PM - 3:00 PM | Home and Community-Based Services as a Foundation for the Future

A strong system of home and community-based services (HCBS) is central to meeting consumer preferences and supporting independence. This session explores how HCBS fits within a modern aging services continuum and how home-based services, community models, and residential settings can work together to support individuals across changing needs. The discussion highlights opportunities for provider development, partnership, and integration across service settings.

Speakers: Chris Sintros (*New England Deaconess Abundant Life Communities*), Alex Johnson (*Newton at Home*)

3:00 PM - 3:15 PM Afternoon Break

3:15 PM – 4:15 PM | When Residents and Leaders Shape the Work Together

Residents are not only recipients of services but essential partners in shaping strong, responsive aging services organizations. This moderated panel brings together senior leaders to explore how meaningful partnership strengthens governance, decision-making, organizational culture, and mission alignment.

Facilitator: Keith Robertson (*Ziegler*)

Panelists: Aline Russotto (*Orchard Cove*), Resident Representative (*Orchard Cove*), Mike Rambarose (*Whitney Center*), Resident Representative (*Whitney Center*)

4:30PM - 6:00PM Reception

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