

**SENIOR LIVING SYMPOSIUM
& TECHNOLOGY SHOWCASE**

MARCH 18, 2025
FOUR POINTS BY SHERATON | NORWOOD MA

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

Speakers: Dan Hermann, Keith Robertson, Mimi Rossi (*Ziegler*)

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.

Learning Objectives:

- To learn about the key operating and financing trends in the not-for-profit senior living sector.
- To highlight the key trends, disruptors and catalysts impacting senior services.
- To understand how national and regional trends are impacting Massachusetts providers and how they can plan accordingly.

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

10:45AM - 11:45AM | Driving Innovation: Technology Trends in Senior Living

Speakers: Adam Fumia (*Sherrill House*), Dan Cavolo (*Loyola Group*), David Lafferty (*The Riverwoods Group*)

Facilitator: Keith Robertson (*Ziegler*)

Senior living CIOs are driving innovation while tackling AI adoption, cybersecurity risks, and interoperability challenges. This panel will explore how AI is transforming operations, the cybersecurity strategies needed to protect sensitive data, and the evolving role of interoperability with healthcare providers. CIOs will share insights on balancing innovation with security, lessons from past breaches, and steps to improve seamless data exchange.

Learning Objectives:

1. Learn how CIOs are leveraging AI to enhance operations while addressing ethical and security concerns.
2. Identify key risks, lessons from breaches, and proactive approaches to evolving threats.
3. Explore challenges and advancements in healthcare data exchange and system integration.

11:45AM - 1:00PM - Lunch & Technology Showcase- Powered by Symbria

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Continuing Education:

This program has been approved for 5.25 NAB (Nursing Home Administrator) Credits. Program Approval Code: 20260317-5.25-A109509-IN An application has been submitted for CEUs for Certified Public Accountants (CPAs) as B.C. Ziegler and Company is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

1:00PM – 2:00 PM | The Future of Dementia Care: Insights and Innovations to Inspire Change

Speakers: Dr. Joan Monin (*Yale University*) Philippe Saad (*DiMella Shaffer*) Michael Smith (*LiveWell*)

Dementia care is undergoing a transformation as bold innovations in design, community, and research challenge traditional approaches. This session will explore cutting-edge strategies that are redefining how we support individuals living with cognitive impairment. Discover how innovative environments can enhance well-being, how person-centered care models foster connection and empowerment, and how research is unlocking new insights into the emotional and social aspects of dementia.

Learning Objectives:

- Explore community-driven approaches that foster meaningful connections and reduce stigma surrounding dementia.
- Identify innovative approaches to dementia care that integrate design, community engagement, and research to enhance the quality of life for individuals living with dementia.
- Analyze how person-centered care models and evidence-based strategies can improve emotional, social, and physical outcomes for individuals with dementia and their caregivers.

2:00PM – 2:15PM Afternoon Break

2:15PM – 3:15PM | Understanding the Structure & Growth Mindset of our For-Profit Counterparts

Speaker: Lisa McCracken (*National Investment Center for Seniors Housing & Care (NIC)*)

Roughly 72% of the Senior Housing sector is owned and operated by for-profit entities. While there may be differences in structure and approach, there are also many similarities in how these organizations are strategically planning for the future. This session will provide an educational overview of how for-profit operators and their capital partners position for growth, how they make decisions and how they see future opportunities in this sector. The aim of this session is to identify potential best practices to adopt within the not-for-profit senior living sector and to surface potential partnership opportunities amongst the various parties who provide housing, care and services for older adults.

Learning Objectives:

- Gain insights into the strategic planning processes, decision-making frameworks, and growth initiatives utilized by for-profit senior housing operators and their capital partners.
- Explore potential best practices from the for-profit senior living sector that can be adapted and implemented within not-for-profit organizations to enhance operations and service delivery.
- Recognize opportunities for partnerships between for-profit and not-for-profit providers to foster innovation, expand housing and care options, and better serve older adults in the senior living sector.

3:30PM – 4:30 PM | CEO Panel – Innovative Approaches for a Changing Landscape

Facilitator: Keith Robertson

Panelists: Trish Gathers (*The Carmelite System*), Jon-Paul Venoit (*Masonicare*), Justine Vogel (*The RiverWoods Group*)

This session will feature insights from three Chief Executives leading innovative organizations across the aging services spectrum. Through a facilitated discussion, they will explore how their organizations are embracing innovation to address the challenges aging services providers face today. Participants will gain a forward-looking perspective on how these leaders are reimagining service delivery, leveraging new approaches, and preparing their organizations to thrive in an ever-evolving landscape

- Explore Innovative Strategies: Learn how leading organizations in aging services are leveraging innovative approaches to tackle current challenges and meet the evolving needs of older adults.
- Understand Future-Forward Leadership: Gain insights into how senior executives are preparing their organizations for the future through strategic innovation and adaptive practices.
- Identify Practical Applications: Discover actionable ideas and strategies that can be applied to your organization to foster innovation and enhance service delivery in aging services.

4:30PM - 6:00PM Reception

FOR SESSION MATERIALS SCAN HERE:

