



SENIOR LIVING SYMPOSIUM

March 18, 2025

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, Mimi Rossi (*Ziegler*)

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

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

Discover how technology leaders are driving innovation, enhancing care, and safeguarding data in today's complex healthcare landscape. This panel will explore strategies for improving interoperability with healthcare providers, leveraging AI to transform operations and elevate resident care, and strengthening cybersecurity to combat evolving threats. Gain insights, lessons learned, and practical solutions from CIOs navigating the intersection of technology and aging services.

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

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



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

As dementia care evolves, innovative approaches are redefining how we create supportive, inclusive spaces for individuals with cognitive changes. This session will highlight strategies that focus on normalcy, inclusion, and integrating dementia prevention into senior living. Learn how purposeful design enhances well-being, how person-centered care fosters connection, and how emerging research provides deeper insights into emotional, social and cognitive well-being..

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

2:00PM – 2:15PM Afternoon Break

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

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.

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

3:15PM – 2:30PM Afternoon Break

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

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

Faciliator: Keith Robertson (*Ziegler*)

4:30PM - 6:00PM Reception