



Ziegler

CAPITAL :: INVESTMENTS :: ADVICE

SENIOR LIVING SYMPOSIUM & Technology Showcase

March 21, 2024

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.

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

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

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

10:45AM - 11:45AM | Operationalizing Artificial Intelligence (AI) In Aging Services

This session will explore the challenges and opportunities of applying artificial intelligence (AI) to the aging services sector, especially in the context of a continuing care retirement community (CCRC) and a home and community-based services (HCBS) provider. Vision how AI can transform the service delivery models, the roles and responsibilities of employees and caregivers, the regulation and payment systems, and the health and wellness outcomes of older adults.

Learning Objectives:

- Understand the specific challenges and opportunities associated with implementing AI in aging services
- Identify key areas where AI can potentially transform service delivery models, provider roles and responsibilities, regulatory frameworks, payment systems, and health and wellness outcomes for older adults.
- Understand strategies for operationalizing AI within aging services, including considerations for implementation, adoption, and ongoing management, with a focus on optimizing benefits while mitigating potential risks and challenges.

Speaker: Joe Velderman (*Cypress Senior Living*)

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



1:00PM – 2:00 PM | Future-Forward Projects: Navigating the New Consumer Landscape

Join a session focusing on future-proofing your communities for an evolving consumer landscape. Dive into emerging development and design initiatives, grasp the pivotal role of Environmental Equity and community engagement in project planning, and explore inspiring real-world solutions designed and developed by LeadingAge members nationally. This session will leave you inspired to think about what can be done next for your smallest projects all through imagining new communities.

Learning Objectives:

- Learn the need of a varied customers who influence the communities we operate, design and serve
- Understand why some communities are looking at new ways to serve the older adult and the larger community
- Hear from leaders in the industry how collaboration at all levels is essential for the success of innovative ideas.

Speakers: Philippe Saad (*DiMella Shaffer*), Gustave Keach-Longo (*The Towers at Tower Lane*), Toby Shea (*OnePoint Partners*)

2:00PM – 2:15PM Afternoon Break

2:15PM – 3:30PM | We're Almost There! What's Next?

As aging services organizations across the country emerge from the pandemic fog, we are starting to grapple more thoughtfully with what this has meant, where we are going, and what we need to be doing to remain viable and relevant into the future. Strategy is once again on our minds, but how to adapt and respond may be different – and more crucial – this time around. This session will explore the “perfect storm” that has expanded as a result of the pandemic, the essentials for moving into uncertainty in the near and long-term, and guidance for how to think strategically about your organization’s future and the options available to you.

Learning Objectives:

- Recognize key trends and forces driving change for aging services organization
- Discuss essential operational changes and adaptations to navigate the post-pandemic landscape
- Consider organizational position and viability as a result of Covid
- Summarize a potential strategic path given position and market opportunity

Speakers: Andy Edeburn (*Elder Dynamics*)

3:30PM – 4:30 PM | CEO Panel – Embracing Change and Moving Forward

This session will feature insights from three Chief Executives representing a wide range of the aging services spectrum. This facilitated conversation will delve into how their organizations are adapting to the challenges that aging services providers currently face, and how they are preparing their organizations for the future.

Learning Objectives:

- To review specific approaches to change and innovation from a variety of organizations
- To gain insight from CEOs as to the key items that today’s providers should focus on.
- For attendees to take away innovation and growth strategies to implement in their respective organizations.

Facilitator: Keith Robertson (*Ziegler*)

Panelists: Zehra Abid-Wood (*Lasell Village*), Adam Berman (*Legacy Lifecare*)
Jim Freehling (*Brookhaven at Lexington*)

4:30PM - 6:30PM Reception

Continuing Education:

This program is seeking approval for Continuing Education Credits for 5.75 total participant hours by NAB/NCERS. 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.