TECHNOLOGY PANEL: HEAR FROM THE EXPERTS

PRESENTED BY:

CHIP BURNS
PRESIDENT
The Asbury Group

CAROL SMITH
Executive Director of Plant Operations and Information Technology
Notre Dame Health Care

LISA MCCracken
Director of Senior Living Research
Ziegler
OBJECTIVES

• To hear an overview of the latest technology trends in senior living

• To get insight into the role of the Chief Information Officer and their perceived biggest challenges and opportunities

• To identify key takeaways for attendees to consider when identifying strategic information technology priorities
AGENDA

**Topic 1**
- Setting the Stage: Key Technology Trends

**Topic 2**
- Panel Discussion

**Questions & Answers**
TOPIC 1: SETTING THE STAGE: KEY TECHNOLOGY TRENDS

LISA MCCRACKEN
Director of Senior Living Research
Ziegler
TECHNOLOGY: SECTOR TRENDS

- Pace of change with technology is significant
- Organizations need to have someone who owns the strategic needs for IT planning (CIO/CTO)
- Adoption of technology is increasing among not-for-profits
- Great opportunity for partnerships
- Providers are a great link between the consumer and technology solutions

Source: Ziegler Investment Banking
CHIEF TECHNOLOGY/INFORMATION OFFICERS

Percent of “LZ 150” with a CIO/CTO

- 2013: 21%
- 2015: 33%

+12% increase

Source: LeadingAge Ziegler 150
CURRENT ENVIRONMENT DEMANDS GREATER SCALE AND SOPHISTICATION

• Largest multi-sites are adding corporate-level positions in response

• Corporate areas of specialty being added by the LeadingAge Ziegler 150 in 2015 (in order of mentions)
  1. Chief Clinical/Health Officer
  2. Chief Information/Technology Officer
  3. Chief Talent/HR Officer
  4. Business Development/Strategy Officer
  5. Chief Compliance Officer
  6. Philanthropy/Foundation Director

Source: 2016 LeadingAge Ziegler 150
DRIVERS FOR NFP SENIOR LIVING CONSOLIDATION

- Complexities of Healthcare
- Leadership Turnover
- Competition
- Ability to Attract Talent/Wrkforce Mgmt.
- Technology Demands
- Reinvestment Requirements
- Hospital Consolidation Pressure
- Financial Pressure
- Diversify Service Lines
- Growth Capital Needs

Source: Ziegler Investment Banking
TECHNOLOGY ADOPTION

PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING ELECTRONIC DOCUMENTATION TECHNOLOGIES

<table>
<thead>
<tr>
<th>Technology</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Medical/Health Records (EMR/EHR)</td>
<td>74.7%</td>
<td>75.3%</td>
<td>80.0%</td>
</tr>
<tr>
<td>Electronic Point of Care/Point of Service</td>
<td>76.6%</td>
<td>77.3%</td>
<td>76.0%</td>
</tr>
<tr>
<td>Care/Case Management and Coordination Software</td>
<td></td>
<td></td>
<td>55.3%</td>
</tr>
</tbody>
</table>

Source: 2016 LeadingAge Ziegler 150
TECHNOLOGY ADOPTION

PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING SAFETY MONITORING TECHNOLOGIES

Source: 2016 LeadingAge Ziegler 150
TECHNOLOGY ADOPTION

PERCENTAGE OF LZ 150 COMMUNITIES/OPERATIONS USING HEALTH & WELLNESS MONITORING TECHNOLOGIES

Source: 2016 LeadingAge Ziegler 150
TELEHEALTH: ON THE RISE?

- Notable increase in usage among LZ 150 across the past year
- Aligns with several key trends:
  - Physician shortages
  - Staff development; retention
  - Improved clinical efficiency
  - Managing cost of care (reduction of hospital admissions)

Source: Ziegler Investment Banking
TECHNOLOGY : ALLOCATION OF RESOURCES

• Ziegler CFO Hotline - greatest spending is on:
  - ICT infrastructure (high-speed internet; wireless)
  - Resident/Client access to Internet & Social Networking Sites
  - Electronic Medical/Health Records

• Increased spending on:
  - Electronic Point of Care/Point of Service technologies
  - EMR/EHR
  - Access Control/Wander Management technologies
  - User-activated Emergency Response Systems

Source: Ziegler CFO Hotline, January 2016
TOPIC 2: PANEL DISCUSSION

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President
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CAROL SMITH
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QUESTIONS & ANSWERS

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