

CALA

News & Views

Issue 47 | August 2023



technology

AI
RESHAPING
ASSISTED
LIVING

FOSTERING
A *Culture*
OF TECHNOLOGICAL
INTEGRATION AND ENTHUSIASM

SCALING
THE TECHNOLOGY
LADDER

ELEVATE
MARKETING
through
INNOVATION

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tech nology

We are standing at the precipice of a technological revolution and this issue of *CALA News & Views* explores how innovation is reshaping caregiving practices and operations within our Assisted Living communities.

This issue delves into the exciting world of technology and its transformative impact. The articles in this edition guide you on an enlightening journey, showcasing the incredible potential of technology to enhance resident experiences, optimize operations and improve care outcomes.

At CALA, we recognize the significance of fostering a culture of technological integration and enthusiasm. Therefore, we will delve into the essential aspects of creating a tech-savvy environment within Assisted Living communities.

By sharing expert advice and real-life examples, we hope to empower you to create a culture that embraces the benefits of new technology.

Wishing you an enlightening and inspiring read.

Sally Michael,
CALA President & CEO



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CALA News & Views – Submission Policy

At this time, CALA does not accept unsolicited articles or queries. Many of the articles we publish are written by our regular contributing writers. We appreciate the time and energy people put into making suggestions for our current and future issues. Our organization's policy, however, prevents us from accepting for review any unsolicited submissions.

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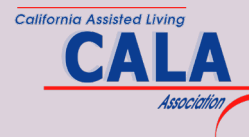
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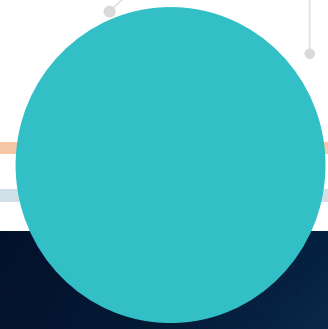
AI

RESHAPING ASSISTED LIVING

A New Era of Care Begins

Artificial Intelligence (AI) is emerging as a transformative technology across many sectors and Assisted Living is no exception. With an aging population and a growing labor shortage, AI presents a unique opportunity to address many challenges faced by Assisted Living communities.

By Kevin Swartzendruber



“Artificial intelligence is really good at coming up with answers. What it can't do is come up with questions.”



According to **Jack Uldrich, acclaimed global futurist and best-selling author**, AI is set to touch every aspect of our lives. He said Ginni Rometty, former CEO of IBM, stated that artificial intelligence is going to change 100% of jobs, 100% of professions and 100% of industries. She said no one is going to escape untouched from this trend. “We’re just at the early stages of this new technology and I think it is going to require us to look and think virtually everything anew,” Uldrich said. “It’s going to be profound.”

The Labor Shortage Challenge

Assisted Living is facing a critical labor shortage and AI can help address this, according to **Andrew Carle, adjunct faculty and lead instructor for the graduate curricula in senior living administration at Georgetown University**.

“We have seven out of 10 Assisted Living communities that say they’re short staffed and 10,000 baby boomers a day retiring in this country. So, we’re going to need 10 million new workers by 2030. Before we even get into it, I think that this is all about the fact that we are mathematically eliminated from having enough workers.”

So, Carle said the need to automate and use AI is important. He points out that projections for adding Assisted Living units annually are futile if there are no caregivers available to provide the necessary care.

“We already know that there’s going to be a lot of seniors but what no one wants to talk about is how we’re going to take care of them. You can do all kinds of projections that we’re going to need to add 100,000 Assisted Living units a year based on demand but, you know, if you don’t have anybody to provide the care, it doesn’t matter.”

Carle said if we leverage AI and automation, we may be able to address the scarcity of workers. AI technologies can streamline routine tasks, allowing Assisted Living professionals to focus on providing personalized care and meaningful interactions with residents.

Optimism and Positive Impacts

Uldrich is optimistic about the possibilities with AI and believes there’s a hidden silver lining.

"I think in the long run, artificial intelligence has the opportunity to make us more human. I mean, if artificial intelligence can do certain things like make a schedule or do an audit, suddenly there is more time and space and effort for human creativity, human curiosity, human empathy, human touch and human connection."

Some of the positive impacts Uldrich pointed out, include:

- **Labor Savings:** AI-powered chatbots and virtual assistants can efficiently handle a significant portion of inquiries, reducing the burden on caregivers. This labor-saving aspect enables healthcare professionals to spend more time engaging in human-centric activities that they are passionate about, enhancing the quality of care provided.
- **Scheduling and Efficiency:** AI can assist C-suite executives in better understanding and optimizing scheduling processes. By automating administrative tasks and resource allocation, AI can improve efficiency, allowing staff to allocate their time and expertise more effectively.
- **Energy Optimization:** As buildings become smarter, AI can optimize energy usage in Assisted Living communities. This optimization leads to reduced utility and energy bills, enabling cost savings for both the community and its residents.
- **Personalized Care:** AI's data collection and analysis capabilities enable communities to gain deeper insights into residents' needs. By understanding individual preferences and requirements, AI can help deliver better-customized services, creating safer and happier living environments.

The Challenges

While AI holds great promise in revolutionizing Assisted Living, it also presents challenges that will need to be addressed. By navigating the ethical considerations, fostering trust, ensuring fairness and aligning with regulatory frameworks, providers can harness the power of AI while upholding resident privacy and dignity. Overcoming integration complexities and striking the right balance between AI and human interaction will be crucial for successful implementation.

"The more practical concerns or problems around AI are bias, privacy concerns and security issues," Uldrich said. "And then there's the whole issue around transparency. AI should be able to explain to us humans how it derived at the answer that it did. It has to be able to sort of provide a crumb trail back saying here's how I came up with the answer that I did so that we can assess it because there are a lot of problems. Today they call it hallucinations of AI. But really, they're lies. AI is just lying. It just comes up with answers that simply aren't true. So that's another big problem."

For details on the legal aspects of AI, please see page 7 for an article from Hanson Bridgett.

Assisting in Providing Care

Artificial Intelligence can help Assisted Living communities improve the quality of care to seniors including remote

monitoring, medication management, fall detection and prevention, cognitive assistance, social engagement, predictive analytics, and ensure a safer and more fulfilling life for older adults.

In a *New York Times* article on April 21, 2022, **Joseph F. Coughlin, who runs the AgeLab at the Massachusetts Institute of Technology**, said "Virtual Assisted Living is already here. Robots are going to play a major role in reminding us to take our medications, keeping us socially engaged, helping us if we fall and can't get up, and navigating getting food delivered to the home. Toilets will give you a checkup a day and tell you if you're not taking your pills or getting nutrition. Pretty soon your toilet will be talking about you."

Embracing AI and its Challenges

To fully harness the potential of AI, Uldrich emphasizes the need to familiarize yourself with AI and its capabilities. It excels at providing answers but needs humans to ask the right questions.

"Artificial intelligence is really good at coming up with answers. What it can't do is come up with questions," Uldrich said. "So I think the next skill of the future is people are going have to become more curious and they're going to have to get better at asking better, more pointed questions. You can keep asking AI better questions and get deeper, more nuanced answers again, you still have to then apply critical thought to it."

Uldrich said humans possess the unique ability to combine insights from various areas to generate new ideas and insights — a skill AI has yet to fully develop. ■



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BRINGING AI INTO FOCUS

BALANCING INNOVATION
WITH LEGAL AND ETHICAL
RESPONSIBILITIES

By Warren Hodges, Hanson Bridgett LLP

The integration of artificial intelligence (AI) technologies has the potential to revolutionize senior care, enhance quality of life for older adults and improve operational efficiency. AI technology detects falls, captures video leading up to the fall, automates alerts to staff, and allows providers to track falls and improve care planning.

“Artificial intelligence” is, in essence, an attempt to mimic human-level intelligence in computational programs by using data and algorithms to “teach” the machine how to make decisions. AI is familiar to anyone who has interacted with voice-controlled virtual assistants like Siri or Alexa, received suggestions for certain TV shows on streaming services or news articles online, or experienced targeted advertising. The more recent “generative” AI tools are capable of more complex and increasingly independent learning as they become trained on large data sets from which they extract patterns and relationships between words and images. Generative AI appears in large language models such as ChatGPT and Bard, which hold human-like conversations based on the user’s text, as well as image-generating tools like Midjourney, which can create images from written text.

As AI tools improve and proliferate, senior care organizations should approach their use with deliberation and careful attention to the legal and ethical risks involved. It is crucial to be aware of the legal considerations and regulations surrounding this emerging technology. Privacy, data security, ethical considerations and regulatory compliance are essential factors that must be carefully addressed to ensure responsible and effective AI implementation.

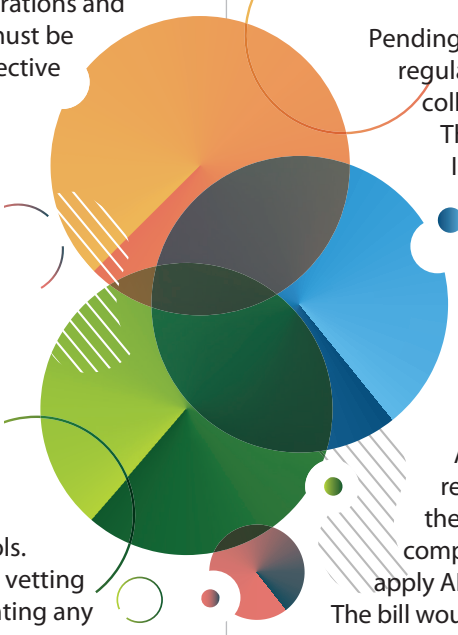
AI tools are effective because they are trained on massive sets of data. Where that data comes from and how it is maintained is critically important to using AI tools safely, appropriately, and in compliance with expanding governmental regulation over their use. Consequently, effective compliance begins with having at least a basic understanding of the technology’s uses, limits and risks, including assurance that companies are only collecting and using data to which it has lawful access. An important first step is partnering with a reliable, trustworthy and committed technology company providing AI tools. Leaders should undertake extensive research and vetting processes before choosing a partner or implementing any technology.

It is also important to understand existing regulations governing the collection and use of the data powering AI tools. Additionally, while personal health information subject to HIPAA is exempt under the California Consumer Privacy Act (CCPA) and the California Privacy Rights Act (CPRA), the CCPA and CPRA strictly regulate the collection, use and dissemination of consumer data. Where providers intend to use the technology to process the personal information of employees or personal information obtained through website traffic, providers must ensure that they obtain consent, clearly communicate the uses of the technology, establish procedures to handle data requests, and develop policies governing data retention and breach notifications.

A data breach involving AI tools has the potential to be catastrophic for companies reliant upon data to train its tools. Senior care providers should look at systems that offer encryption techniques to secure sensitive resident data and restrict its use, conduct regular security audits and vulnerability assessments to identify and address potential weaknesses in data systems, collect only the data necessary to perform the defined task, and anonymize resident information whenever possible.

Another key concern arising from the collection and use of data is the potential for bias. AI algorithms are only as unbiased as the data they are trained on and the safeguards imposed upon those training the systems and reviewing their outputs. Thus, a critical component in training AI tools is regularly reviewing tools to detect and eliminate bias. Such bias, if unmonitored, could infect critical decisions from admissions criteria to employment decisions. Leaders must collaborate with their technology providers, third-party experts, and legal counsel to continually monitor and mitigate bias caused by the use of AI technologies.

While leaders must take steps now to conform their use of emerging technologies within existing regulatory frameworks, new regulations are also on the horizon. A host of federal agencies have issued regulations or guidance on the use of AI, such as guidance from the Equal Employment Opportunity Commission on avoiding disability discrimination in the use of AI, and the White House’s proposed “AI Bill of Rights.”



Pending federal legislation includes proposals to regulate or ban the use of certain AI tools or collection of biometric data for machine learning. The European Union has approved its “Artificial Intelligence Act,” which provides a vast regulatory framework limiting the use of AI and may serve as a framework for regulators in other parts of the world. New York City and the State of Illinois have enacted laws regulating employers’ use of AI in making automated employment decisions.

California is likely to follow suit. California’s Assembly Bill 331 died in committee but could reemerge in future legislative sessions. If passed, the bill would have imposed vast and onerous compliance requirements upon companies that apply AI tools in making “consequential decisions.” The bill would have defined a “consequential decision” to include activities related to health care or health insurance, employment considerations, housing determinations and accreditation processes, to name just a few examples.

Companies deploying AI tools for covered purposes will be required to know what data is collected and how it is used, describe the safeguards implemented to protect against “foreseeable risks,” assess potential adverse impacts on protected characteristics such as age or sex, and a host of other requirements designed to mitigate adverse impacts caused by AI tools.

AI has the potential to revolutionize the delivery of care to California’s seniors. By careful planning and paying close attention to the emerging regulatory landscape governing AI and data collection, leaders can continue to improve the lives of seniors safely, ethically and compliantly. ■

Warren Hodges is counsel for Hanson Bridgett LLP. Warren specializes in employment law providing litigation, advice and counsel services for private and public employers in California. Warren has represented many senior care organizations over the last decade, as well as other health care providers. Warren is also the chair of Hanson Bridgett’s AI Task Force.

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We were excited and deeply grateful for the tremendous turnout of members and senior living professionals at Elevate: CALA's Spring Conference & Trade Show in Sacramento this June. From the dynamic trade show to the high-energy and high-level sessions, attendees embraced the opportunity to reconnect, reignite their drive and renew their purpose. This extraordinary event sparked a renewed dedication to excellence, leaving a lasting impact on Assisted Living in California. Together, we have set a new standard for innovation and advancement in our field.

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SCALING THE TECH LEAD

**Expert
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Innovation*



CALA invited Eskaton and Oakmont Management Group to answer some questions regarding technology in their communities. Below are responses from ***Therese ten Brinke, executive director of innovation & impact at Eskaton;*** and ***Kristen Chism, director of activities; Andrew Moret, vice president of culinary services;*** and ***Scott Carlson, senior vice president of operations at Oakmont Management Group.***



NOLOGY

DRR

In what ways do you see technology addressing the unique challenges and concerns faced by residents in your communities?

What are the biggest obstacles or concerns you have about integrating technology in your communities?

ESKATON

Senior living is rapidly changing and technology will continue to be part of the solution for meeting future needs. From leveraging robots to artificial intelligence, emerging technology solutions will enable senior living communities to tackle workforce shortages as well as individualize care. In the near future, robots will be used alongside team members, assisting them, to carry out mundane tasks to ensure they have more time to spend with the residents.

Imagine a scenario where a resident uses their Alexa Show to ask for assistance and a friendly care partner or concierge pops up asking how they can help. The resident requests a cup of orange juice. The care partner orders a cup of orange juice in their Point of Sale solution and deploys a robot to the kitchen to pick up a cup of orange juice and schedules it to drop at a nearby drop off location where a care partner delivers it in-person. The robot and backend infrastructure saved the care partner the trip to the kitchen and enabled them to spend some extra time talking with the resident at drop off.

Beyond robots, artificial intelligence capabilities will also likely be commonplace across all departments in the future. From leveraging AI to capture resident information such as life history and preferences to build a robust resident profile that is used to create a more personalized experience. Integrated AI technology will feed individualized information into different systems across multiple departments to create curated programming and menus that reflect resident's interests and preferences.

The future of senior living will require us to identify what mundane tasks can be automated or streamlined to free up time for team members to focus more on curating personalized experiences and nurturing relationships with the residents in the community.

OAKMONT MANAGEMENT GROUP

Technology addresses challenges and concerns faced by residents in our communities in the following ways:

Communication and Connectivity: By leveraging video calling platforms, social media and messaging apps, technology enables residents to stay connected with their loved ones and combat feelings of isolation or loneliness.

Health Monitoring and Care: Wearable devices, remote monitoring systems and telehealth solutions assist our team members in providing care and empowering residents to manage their health effectively.

Safety and Security: Resident monitoring systems, including lighting motion sensors, fall detection devices and emergency call systems, enhance the safety and security of our residents.

Cognitive Stimulation and Mental Wellness: Technologies like IN2L offers cognitive training programs, interactive games, puzzles and memory exercises designed for older adults, providing cognitive stimulation and engagement.

Access to Information and Services: Internet connectivity in our resident computer centers allow our residents to access a wealth of information, research topics of interest, and engage in lifelong learning.

OAKMONT MANAGEMENT GROUP

At Oakmont Management Group we take a calculated approach before integrating new technologies into our communities. Important factors we consider include:

Cost and Budget Constraints: Implementing technology solutions can require a significant upfront investment and ongoing expenses, which may not easily fit into community operating budgets.

Resistance to Change: Overcoming resistance and fostering adoption of new technologies among residents and team members can be a challenge.

Technological Complexity: The rapid advancement of technology can create concerns regarding the complexity of integrating and managing various systems, requiring technical expertise and infrastructure.

Privacy and Data Security: Collecting and managing personal data through technology solutions raises concerns about privacy and data security, necessitating appropriate measures to protect sensitive information.

Accessibility and Usability: Ensuring that technology is accessible, user-friendly and tailored to the specific needs of older adults is crucial, particularly for those with physical or cognitive limitations.

Interoperability and Integration: Integrating different technology systems seamlessly and ensuring compatibility with existing infrastructure and software can be a challenge.

Maintenance and Support: Ongoing maintenance, updates and technical support are necessary for technology systems, and operators need to consider the availability of reliable support and potential disruptions.

ESKATON

The biggest obstacle when adopting new technology today is lack of interoperability. Many technology solutions today operate in a silo. The information gathered in one system is not seamlessly shared between other systems used by the community. If the data is not shared between all the systems the data is meaningless because it cannot be easily used or referenced. We have experienced that when technology solutions operate in a silo, the system adds to the team's workload and reduces usability and adoption by staff.

At Eskaton, we have shifted the way we evaluate new technology solutions. If the solution is not able to integrate with current/existing systems, we typically will not move forward with the technology partner.

What strategies have you implemented to ensure the smooth adoption and ongoing use of technology by both residents and staff?

ESKATON

At Eskaton, we take a “design-with” not a “design-for” approach when evaluating new technology solutions. We invite team members to participate in focus groups about existing challenges and participate in demos to review potential technology solutions. The evaluation process for identifying new solutions may take anywhere from a couple of months to a year depending on the consensus of the group. Once a technology partner is identified, a small number of communities will be selected to pilot the solution for at least three months to determine if it meets the existing needs. During this time, the community can also identify operational best practices for use.

This intentional approach to innovation ensures Eskaton is able to proactively identify gaps and best practices prior to scaling to other communities to ensure a smooth adoption. With all new technology, we ensure regular communication with the communities and monitor utilization using dashboards and reports provided by the technology provider. If we notice any trends downward, we proactively reach out to identify potential gaps in the solution to ensure ongoing use and maintenance.

OAKMONT MANAGEMENT GROUP

Candidly, we have learned from our mistakes, and have adjusted our approach. We have tried to get a few tech initiatives off the ground that frankly failed to launch. Through those failures we have learned along the way. Through those “lessons” we now take a more measured approach. Some of our strategies have included:

Comprehensive Needs Assessment: Conducted a thorough needs assessment to understand the specific requirements and challenges of residents and team members regarding technology adoption.

User-Centric Approach: Involved residents and team members in the decision-making process and technology selection, seeking their input on features and functionalities they find valuable and user-friendly.

Communication and Education: Provided clear and concise communication about the benefits and purpose of implementing technology. Educated residents and team members on how the technology works and its potential applications.

Pilot Programs: Introduced technology gradually, starting with smaller-scale pilot programs or specific areas of focus to gather feedback and make necessary adjustments.

Ongoing Support and Training: Provided continuous support, established a dedicated helpdesk, and offered training sessions and resources to address questions and concerns promptly.

Encouraged Peer Support and Mentoring: Fostered a culture of peer support and mentoring, where residents and team members comfortable with technology assist others in learning and using it effectively.

Feedback and Continuous Improvement: Regularly sought feedback from residents and team members to make necessary adjustments, address issues and enhance the technology's functionality and usability over time.

From your experience with technology, what are words of wisdom you would like to share with others working in Assisted Living?

OAKMONT MANAGEMENT GROUP

Embrace Change: Embrace the opportunities that technology brings to enhance the lives of older adults and operations of Assisted Living communities.

Involve Stakeholders: Engage residents, team members and other stakeholders in the process of integrating technology, ensuring that solutions meet their needs and preferences.

Start Small and Scale Up: Begin with smaller pilot programs or specific areas of focus, gradually expanding the use of technology based on positive outcomes and feedback.

Prioritize Training and Support: Provide comprehensive training and ongoing support to residents and team members, ensuring comfort and confidence in using technology effectively.

Foster a Culture of Learning: Encourage continuous learning and curiosity about technology through educational sessions and activities.

Maintain a Human Touch: Remember that technology is a tool to support and enhance care, communication and connection, complementing personal interactions in Assisted Living.

Stay Informed and Adapt: Stay updated on the latest trends and advancements, adapting technology solutions to provide the best possible care and support.

Purposeful Implementation: Approach technology with a thoughtful mindset, leveraging its potential to improve the quality of life for older adults in Assisted Living communities. Lastly, it's important not to overthink the adoption of technology. In today's rapidly advancing technological society, time is of the essence. Spending too much time contemplating a new strategy or approach may cause you to miss valuable opportunities. While it's essential to be thoughtful in your approach, it's equally crucial to act swiftly and adapt to the changing technological landscape. Embrace a mindset that values agility and quick decision-making while ensuring a thoughtful and deliberate approach to technology integration.

ESKATON

Eskaton is proud to have a culture that values innovation. In order to move into the future, senior living providers have to be bold and leverage technology to streamline workflows, enhance care delivery and improve relationships. The piece of wisdom I would share is do not be afraid to fail. Technology and innovation is messy and failing often is a healthy and normal part of innovation. At Eskaton, we go in knowing that not all ideas and solutions will be successful. With every partnership we go in knowing there is a risk of failure but even failures lead to growth and discovery. My biggest piece of advice is creating systems that support failing in a sustainable way. By piloting a solution in one or two communities your organization has the opportunity to learn and determine if the solution is a viable fit — if not, it is easier to part ways with the technology partner.

TECHNOLOGY *Implemented*

by Eskaton and Oakmont Management Group

ESKATON

In 2017, Eskaton rolled out a technology platform that empowers residents and staff with technology to improve communication and connectedness. The initial rollout included a smart tablet and a resident and family app. Adoption rates of the tablet and app were mixed. Future rollouts included voice-enabled smart home solutions. These enhancements enable residents to control their environments using their voice or a smart device. Due to its success at the pilot community, the solution was scaled across all communities. Fast forward six years later; voice is part of everyday life for residents living at Eskaton.

Eskaton credits its success because speaking feels more natural than interacting with other forms of technology, like the tablets we initially rolled out. Voice-first technology reduces the friction of technology adoption. Adoption of voice-first technology among residents continues to be between 50-75%. Voice assistants are not just a personal assistant, but also an assisted device that supports day-to-day living. Tasks like getting up to switch a light on or off or looking at the clock can be difficult for residents living with vision or mobility changes.

Beyond resident engagement solutions, we leverage solutions to enhance care delivery. In early 2019, Eskaton rolled out a real-time fall detection solution using SafelyYou's artificial intelligence-enabled video recording system. SafelyYou plays an integral role in Eskaton's fall prevention program. With this innovative solution, our care teams have been able to individualize care, better understand why and how a person falls and implement proactive ways to reduce the likelihood of future falls during post-fall HUDDLES. Eskaton piloted the solution in three communities and based on success scaled the solution across all communities providing Assisted Living and dementia support.

OAKMONT MANAGEMENT GROUP

At Oakmont Management Group we have implemented a signature program of engagement technologies throughout our communities. Our program includes three main systems: IN2L (It's Never 2 Late), Eversound and Rendever. These platforms have been chosen for their ability to enhance overall engagement and well-being of our residents.

IN2L is a versatile system that allows us to interact and engage residents across all levels of cognition. It enables us to eliminate physical hurdles such as auditory deficiencies and limited

range of motion. With IN2L, we can dive deeper into resident engagement by immersing them in worlds well beyond our four walls. It taps into their deepest long-term memories and serves as a bridge for communication, connecting them with multiple generations.

Eversound is another valuable technology we have implemented. It addresses auditory deficiencies by providing personalized, high-quality audio experiences. This ensures that residents can fully participate and enjoy activities, even if they have hearing impairments. By improving audio clarity, Eversound enhances the overall engagement and enjoyment of our residents during group activities, presentations and entertainment events.

Additionally, we have integrated Rendever, a virtual reality platform, into our program. Rendever allows residents to explore and experience virtual environments, which stimulates their senses and provides opportunities for meaningful engagement. By immersing residents in virtual experiences, we can take them on virtual tours, visit landmarks, or revisit places from their past, triggering memories and fostering connections.

At Oakmont Management Group, we take great pride in the exceptional dining experience we offer to our residents. In line with our commitment to continuous improvement, we initiated a pilot program in select communities in 2022 in partnership with Bear Robotics. This pilot program introduces robotic servers to our dining rooms, aiming to enhance our dining experience even further. Although we are still in the early stages of implementing this technology, we are excited to share that the initial response from our residents and team members has been overwhelmingly positive.



FOSTERING A Culture OF TECHNOLOGICAL INTEGRATION AND ENTHUSIASM

By Taren Petros, Carlton Senior Living



At Carlton, we lead by example when it comes to embracing new technology and fostering a culture of innovation. Our proximity to Silicon Valley has presented us with exciting opportunities, but it's our willingness and "Let's try it" attitude that drives these ideas forward. The enthusiasm for innovation and active engagement in new projects motivates everyone involved, including residents, families and staff.

We recognize the unique benefits of using technology and collectively strive to grow in this area. Our approach encourages open dialogue, welcomes ideas from all levels of the organization, and provides the necessary resources and support for innovative initiatives.

Focusing on New Technology

One of our top priorities is emphasizing how technology can assist our industry. We aim to support our staff by streamlining processes and reducing busy work that distracts us from our ultimate goal: people caring for people. We take pride in cultivating a culture of empathy and compassion. While technology cannot provide those human characteristics, it frees our staff to spend more time fostering deep connections with our residents and their families.

Integrating New Systems

When introducing new technology, clear communication is paramount. We ensure that we effectively communicate how the technology will benefit both Carlton as a whole and individuals within the organization. We highlight its potential to improve efficiency, save time, reduce costs, enhance productivity and create new opportunities. We have found that once the benefits have been communicated and understood, we are more successful in adopting new technologies.

Communication Through Training

To ensure this communication is consistent and reaches everyone in the company, we rely on continuous live training through Carlton University. This training is offered to all employees, whether newly hired or seasoned. When introducing new technology, we demonstrate how it will enhance the experiences of both residents and employees, fostering buy-in and excitement. Throughout this process, we reinforce the concept that "We are Carlton." This means that we are all integral to the success of the company and the creation of a wonderful community for our residents. Achieving the intended impact of new technology requires the collective embrace, utilization and positive integration by all of us at Carlton.

This ongoing training approach has been highly successful in addressing any concerns or difficulties encountered by our staff, thus strengthening the overall implementation process. It not only provides knowledge but also fosters enthusiasm among our team members.

Continuously Adapting and Improving

Given the constant evolution of technology, it is essential to continuously adapt and improve. We regularly evaluate the effectiveness of the technology we employ and make necessary adjustments. There have been instances where we discontinued less successful systems, and we value open and honest discussions with end users. We actively seek the opinions of our team members, both positive and negative, to facilitate necessary adjustments. This open dialogue empowers our team

and fosters a sense of ownership over the technology, reinforcing our commitment to future innovation.

At Carlton, we are proud of our approach to embracing technology and fostering a culture of innovation. We believe that through our collective efforts, dedication to ongoing training, effective communication and openness to adaptation, we will continue to enhance the lives of our residents, support our staff, and provide an exceptional living experience for all. ■

Taren Petros is vice president of business operations and technology for Carlton Senior Living. After graduating from UCLA she worked in the tech industry in San Francisco and used that experience to bring a fresh perspective on using technology in senior living. During her eight years at Carlton, she has piloted and successfully implemented several exciting technologies designed to help both staff and residents.

CARLTON'S ADOPTED TECHNOLOGIES

Taren Petros said some of the technologies Carlton has adopted include:

SafelyYou: An artificial intelligence-based solution for fall detection and prevention in memory care, ensuring safety and peace of mind for our residents and their families. By seamlessly monitoring and identifying potential fall incidents, SafelyYou allows us to respond promptly and provide immediate assistance.

TouchBistro: A modern tablet-based order-taking system implemented in our Dining Rooms, enabling our waitstaff to provide efficient and personalized service, ensuring an exceptional dining experience. With TouchBistro, our staff can seamlessly manage orders, customize preferences and ensure accurate and timely delivery, enhancing overall satisfaction and enjoyment during mealtimes.

Amazon Speak2: Residents use voice-enabled Amazon Alexa devices that facilitate seamless communication and coordination with staff and family members, promoting efficient workflow and enhancing residents' experience.

iPhones: Integrated into our operations, iPhones have revolutionized care tracking and improved staff productivity. They enable staff to record and access important information, such as care tracking, incidents and changes of the condition resulting in streamlined care delivery and enhanced communication.

Photo courtesy of Carlton Senior Living



ELEVATING MARKETING *Through* INNOVATION

By Kevin Swartzendruber

Exploring the Transformation of Sales and Technology

In recent years, the Assisted Living field has witnessed a significant transformation, largely driven by advancements in technology. As the world becomes increasingly digital, Assisted Living communities have recognized the need to adapt their sales and marketing strategies to reach and engage with their target audience effectively.





audience expects a more interactive and personalized experience. Assisted Living communities now leverage digital platforms, including websites, social media and email marketing to engage with potential residents and their families. These channels allow for real-time interaction, personalized messaging and the ability to address inquiries promptly.

"To thrive in an ever-changing, competitive senior living landscape, sales and marketing leaders must leverage technology to nurture and scale their marketing efforts," said **Jen Lovely, executive vice president of sales for Conversion Logix**, a marketing firm that serves senior living clients.

"COVID really accelerated the adoption of moving from more traditional marketing into more of the digital space," said **Deborah Howard, CEO of Senior Living SMART**, another marketing firm serving the senior living community. However, "Not all operators fully understand it and are really fully leveraging it to its potential."

Sidarany Phillips, director of marketing for Clearwater Living, said marketing technology "allows us to be more targeted with our approach with higher reach, gives us flexibility with our spending power and ability to pivot quicker."

Marketing Automation

Technology has revolutionized and streamlined the sales process, enabling remarkable automation capabilities. And technology allows marketing departments to personalize the prospect journey. Personalized content and recommendations not only increase the likelihood of conversion but also foster a deeper connection with potential residents and their families.

"Marketing automation is absolutely non-negotiable," Howard said. "It's gone from nice to have to a non-negotiable because the sales cycle is so long. It requires so many touch points and the sales team can only work so many leads at a time."

Lovely said Assisted Living long sales cycles can significantly benefit from marketing automation as it enables marketing leaders to attract and convert higher quality leads and increase the rate of conversions making teams more efficient with limited marketing dollars.

"In senior living, occupancy can change on a dime. With marketing automation in place, you keep the pipeline going so those recoveries move faster, positioning your team as the hero of the portfolio," she said.

Enhanced Communication and Engagement

Technology has greatly improved communication channels between Assisted Living communities and prospective residents or their families. In the past, traditional marketing methods such as brochures and pamphlets were the primary means of conveying information. However, today's tech-savvy

Howard highlighted the importance of leveraging digital platforms and tools for effective marketing strategies.

"I think the first thing is, if you haven't redone your website in two or three years, it's old," Howard said. "We see websites that just look ancient and they're nothing more than an online digital brochure. There's nothing engaging. There's not anything like floor plans and videos and surveys and chat blogs, the things that you want to read and consume and learn.

"Websites need to be resource rich and super engaging, valuable in generating leads and set up for conversion," she said.

"You should set up your appointment link so people can schedule tours from the Google business profile and then you should complete the section which allows you to put in all those keywords to answer common questions," Howard added. She said the platform of choice for many Assisted Living communities is HubSpot, which offers comprehensive marketing services in one place, including blog posting, social media management and paid ads.

"Technology currently has and will continue to have an impact on lead nurturing," according to Phillips. "From retargeting capabilities to marketing automation that includes full integration capabilities, we will be able to allow more time for our sales teams to focus on quality interactions and building relationships with those who are much closer to a decision."

Communication Tools

"Conversation tools such as chatbot or live chat technology allow us to engage with prospects and families during their research phase," Phillips said. "And they are 'chatting' with customers even when our team isn't necessarily working, i.e., early and late hours. We now know more about a prospect before we even speak with them live."

Phillips said chatbots and live chat features on the Clearwater Living website have increased engagement on the site month over month.

"The majority of our leads come from the internet and convert via some form on our website or from our third-party providers who focus heavily on digital marketing to generate leads," she said.

Online Reputation

In the digital age, online reviews and reputation management have become vital for the success of any business, including

Assisted Living communities. Prospective residents and their families heavily rely on reviews and ratings when making decisions.

Technology enables communities to actively monitor and respond to online feedback, addressing concerns promptly and demonstrating their commitment to quality care. Additionally, social media platforms provide opportunities for communities to showcase positive experiences, share resident success stories and engage with the community.

Digital Marketing

Phillips said digital/online advertising gives Clearwater Living the opportunity to respond easily to changes in the market or outcomes. "Traditional advertising (i.e., print) is a longer cycle and does not typically have as broad of an audience. Traditional advertising is also more difficult to track. Digital imprints make it easier to track results and retarget the same audience based on their engagement.

Phillips said your money goes a long way with digital advertising. "Reach is across multiple channels and platforms, and we can be as targeted as we want," she said. "We have the flexibility of deciding whether we want to reach a broad audience to generate a lot of traffic/leads or focus on more specific segments with potential for higher conversion. And the strategy can be tailored to a market or needs of the specific community."

Data-Driven Marketing Strategies

With the advent of advanced analytics and customer relationship management (CRM) systems, Assisted Living communities can now gather and analyze vast amounts of data. This information provides valuable insights into customer preferences, demographics and behavior patterns.

"The CRM is really the foundation of sales and making sure that the CRM is going to be a good fit for your team," Howard said. CRMs enable communities to track and manage leads, automate follow-ups and schedule appointments. Sales teams can now access a centralized database of prospects, ensuring consistent and coordinated communication. In addition, digital platforms and applications facilitate the completion of paperwork and documentation, reducing the administrative burden and allowing staff to focus more on building relationships with potential residents.

Howard advises tracking all marketing channels to ensure accurate measurement of performance metrics such as return visitors, website load time and bounce rate.

"Step No. 1 is everything can be and should be tracked," Howard said. "So your marketing channel, your Google business profile, your website, your social, your paid, your organic, your referred traffic. Make sure that all of that tracking exists."

"Own your marketing, own all your licenses and have access to all your analytics so that you can really see what's going

on," she said. "You're not relying on somebody to kind of cherry pick your reporting and tell you the numbers that they want to share with you. You should have complete control, transparency and visibility to all of the results you're getting on your marketing channels and a lot of senior living providers have."

Optimizing the Google business profile is another crucial aspect often overlooked by communities. It plays a significant role in local search results and influences potential residents' decision-making process.

"So, making sure that there's a tracking number on there and your UTM (Urchin Tracking Module) codes are set up so that you know how many website visits came from your Google business profile," Howard said.

Phillips said digital analytics can be very overwhelming and can change as the needs of the business change. "Lead generation and lead conversion are always going to be at the forefront of how we measure performance and results. And what is most important will depend on what the needs are." She added that the Clearwater Living marketing team has a holistic approach to metrics and they look at specific data points.

"However, we also look at the overall trends and whether we are achieving the result we want – leads, conversions, etc. While there is more flexibility with regard to technology, it's also important to give it time. Even technology has a learning curve."

Lead Scoring

Howard also recommends lead scoring as not all leads are equal in terms of fit, decision stage and qualification. By assigning point values based on lead engagement, communities can prioritize and allocate resources effectively, ensuring that sales teams work on the most promising leads at the right time.

"The fact is not all leads are created equal. There are some that are a better fit for one community than another. There are people that are in different stages of their decision journey. There are ones that are just more qualified than others.

Virtual Reality

Another technology being used more and more are video tours and virtual reality experiences, which can be powerful tools for showcasing communities, enhancing the decision-making process for families who visit a community's website or cannot visit in person.

“While there is more flexibility with regards to technology, it’s also important to give it time. Even technology has a learning curve.”

Phillips said accessibility, especially during the pandemic, was pivotal for Assisted Living communities.

“With virtual conference platforms (and even just your phone with FaceTime or whatever video app you have downloaded), you can have a “face-to-face” connection and conduct a tour or assessment anywhere in the country or world,” she said.

Technology Challenges

“The biggest challenge with technology is adopting and usage,” Phillips said. “Our sales teams focus on people and sales – as they should. From an industry standpoint, many are not that tech savvy, especially with all the rapid changes. So, we have to be mindful of what technology is easy to use, is effective and will save them time.

“We are a high-touch industry, and it’s an emotional journey for our prospects,” Phillips said. “There is a fine balance between technology, which can be challenging for our current demographic/audience to maneuver, and personal touch.

The Future of Technology

New technology is coming fast and changing quickly. Howard said future technology will further help sales and marketing teams with information about the prospects and their family members.

“I really see the continuing improvement of personalizing the prospect journey down to the individual person,” Howard said. Chatbots and conversational AI will increase, according to an article in *Business News Daily* called “10 Tech Trends that Will Influence Your Marketing Strategies.

AI-powered chatbots can be used for customer support, expanding contact strategy dramatically with a controlled message,” said **Joey Penick, former vice president of marketing at Lumen Technologies**, in that article.

“The basic principles of how you market and build a brand haven’t changed – despite what everyone says – in the past 10 or 15 years,” said **Allen Adamson, adjunct professor at New York University’s Stern School of Business and co-founder of Metaforce**, in that same *Business News Daily* article. “What technology has done overall is magnified what was always true.” ■

COMING SOON THE NEW CALA WEBSITE!



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We’re excited to introduce the newly redesigned CALA website, meticulously crafted to deliver enriched functionality, seamless navigation and a breadth of fresh content. This reimagined digital platform exemplifies CALA’s steadfast dedication to amplify and elevate communication throughout our community.

Highlights of the redesigned platform include:

EFFORTLESS EXPLORATION: Swiftly access customized resources for members, residents, policymakers and more.

ELEVATED SEARCH EXPERIENCE: Navigate with precision using our newly enhanced website search feature ensuring swift access to exactly what you’re seeking.

NEW RESIDENTS AND FAMILIES HUB: Discover insights that guide residents and families to communities statewide, complemented by a consumer checklist and handy tools for their journey.

NEW INNOVATIVE MEMBER COMMUNITY LOCATOR: Prospects may embark on a dynamic exploration of CALA member communities. We’re making it easier for visitors to find you!

And this is just the beginning! We’re diligently enhancing your experience with more captivating features on the horizon.

Join us in embracing this exciting transformation! Start your journey at www.caassistedliving.org.



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2023 Event

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November 6-8

Renaissance Palm Springs
Hotel and Palm Springs Convention Center

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ONGOING: Senior Living Leadership
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- Spring Conference and Trade Show

June 3-5

Hyatt Regency Hotel and Safe Credit
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