



Ziegler Link•age Funds | LeadingAge CAST CTO Hotline

SEPTEMBER 2025



Ziegler

ZIEGLER LINK•AGE FUNDS



link•age

LeadingAge[®] **CAST**
center for aging services technologies

About Ziegler Link•age Funds

The Ziegler Link•age Funds represent the convergence of proven investment excellence and innovative aging solutions – a forward-thinking venture capital fund that combines Ziegler’s established financial expertise with Link•age’s specialized knowledge to identify and nurture breakthrough companies transforming the aging care landscape.

Over \$110 million in capital commitments in the three funds combined to invest in companies improving aging and post-acute services. Fund goals are: generating returns for our investors, fostering collaboration and innovation between strategic investors and portfolio companies, and positively impacting the lives of seniors and improving the healthcare experience.



About LeadingAge CAST

The LeadingAge Center for Aging Services Technologies (CAST) is focused on development, evaluation and adoption of emerging technologies that will transform the aging experience. As an international coalition of more than 400 technology companies, aging-services organizations, businesses, research universities, and government representatives, CAST works under the auspices of LeadingAge, an association of 5,500 nonprofit organizations dedicated to expanding the world of possibilities for aging.

LeadingAge CAST’s mission is to unleash the potential of technology for innovative development across the continuum of health care, housing and services for older adults. Their goal is to support independence, ease caregiver burdens, enhance care quality, reduce healthcare costs, and improve operational efficiency.



CAST envisions a future where technology fulfills its promise to meet the needs of an aging society. Through collaboration, CAST fosters rapid advancement of aging services technologies by promoting international partnerships, educating providers, shaping public policy, and encouraging standards development. They lead initiatives in telehealth, wellness monitoring, and digital communication tools that connect older adults with caregivers and families.

To support implementation, CAST offers a comprehensive suite of resources including whitepapers, matrices, online tools, and real-world case studies that help aging services providers adopt the right technologies effectively. Additionally, CAST engages with policymakers and the private sector to promote supportive legislation and innovation, while continually gathering insights from providers and older adults to align technology development with real-world needs.

Authors & Contributors



JENNY POTH

*Senior Vice President
Ziegler Principal Investments &
Fund Management*

jpoth@ziegler.com



SCOTT CODE

*Vice President
Center for Aging Services Technologies
LeadingAge*

scode@leadingage.org



KATIE SCHMITZ

*Managing Director
Head of Ziegler Principal Investments &
Fund Management*

kschmitz@ziegler.com



MEGAN CUNNINGHAM

*Senior Research Analyst
Ziegler Senior Housing & Care Finance*

mwinter@ziegler.com

Table of Contents

Welcome Letters	5-6
---------------------------	-----

<i>Executive Summary</i>	<i>7</i>
------------------------------------	----------

Section I: Organizational Dynamics

General Respondent Info	8
Technology Leadership.	9

Section II: Technology Adoption

Electronic Medical/Health Records (EMR/EHR)	10
Automatic Fall Detection Technologies	11
Passive Monitoring Technologies	12
Post-acute Referral Management Technologies.	13
Home- and Community-Based Services (HCBS) Technologies	14
Staff Scheduling Softwares.	15
General Ledger Softwares	16
Customer Relationship Management (CRM) Softwares	17
Social Connectedness and Engagement Technologies	18
Digital Dining Service Softwares	19
Data Analytics Softwares	20
Large Language Models (LLM)	21
Cybersecurity Testing Solutions	23
Fleet-Managed Smart Home Devices	24
Computing Models and Cloud Providers	25

Section III: Technology Planning

Strategic IT Planning	26
Motivators for Adopting New Technology	27
Barriers to Adopting New Technology	28
Measuring Technology Success	29
Innovation Councils and Committees	30
Preferred Sources of Technology Information	31
Data Governance Programs	32
Data Science Functions.	33
Technology Support for Staff and Residents.	34
Changing Consumer Technology Expectations.	36
Cybersecurity Preparedness.	38
Enterprise-Level Adoption of AI.	40
Enterprise-Level Adoption of Automation	42
Additional Feedback on Technology Strategies.	43

<i>Appendix.</i>	<i>44</i>
--------------------------	-----------

A Note from Ziegler Link•age Funds

We at Ziegler Link•age Funds are so pleased to be partnering with LeadingAge CAST to bring you the first ever CTO Hotline report!

For the past decade the Ziegler Link•age Funds have been dedicated to improving the lives of older adults and their families not only through our venture investing, but also our ability to leverage the networks of both Ziegler and Link•age to unite senior living and care decision makers in pursuit of innovation. Many innovative strategies include an element of technology, and yet, up until now, we have had few clear and precise datapoints and benchmarks from which to track our progress. Advancements in technology and adoption have been taking place rapidly, but we've been unable to answer questions like: Is technology being integrated as a strategic priority for most operators or is it treated as a cost center? Where do providers learn about new technologies and who makes the decisions on which to invest in?

For our operators, I hope the findings in this report help you build and execute your innovation roadmap, and for entrepreneurs and investors, I hope you leave this report understanding how truly thoughtful and forward-leaning life-plan communities are when it comes to thinking about not just relevant technological solutions for today, but also those of tomorrow.

I thank you for your interest in this report – Please enjoy!



Katie Schmitz
Managing Partner
Ziegler Link•age Funds



A Note from LeadingAge CAST

We at LeadingAge CAST are proud to partner with Ziegler Link•age Funds to bring you the inaugural CTO Hotline report, a milestone in our shared commitment to advancing technology in aging services.

Accelerating the adoption of emerging technologies that improve the lives of older adults and those who care for them – the Center for Aging Services Technologies (CAST) focus since our founding more than two decades ago – is more than ever an important and worthwhile effort, as technologies continue to evolve and change. Data and benchmarking are critical to that effort. But until now, we have lacked consistent benchmarks to track progress and guide strategic planning.

This report represents a significant step forward. It offers a first-of-its-kind look at how technology is being prioritized, adopted, and integrated across the aging services and the findings provide valuable insights into how aging service providers are approaching innovation, from strategic planning and decision-making to identifying barriers and opportunities. It also highlights the thoughtful and forward-looking mindset of communities as they evaluate technologies not just for today's needs but for tomorrow's possibilities.

We hope you find the CTO Hotline report useful and we look forward to an ongoing exploration of technology use and impact in senior living.

With appreciation,



Scott Code
Vice President, Center for Aging
Services Technologies, LeadingAge



Executive Summary

The inaugural 2025 Ziegler Link•age Funds/LeadingAge CAST survey was designed to understand how not-for-profit senior living and care organizations are approaching technology strategy, adoption, and innovation. The survey aimed to identify current trends, challenges, and opportunities related to IT governance, infrastructure, workforce enablement, and resident experience, while also capturing perspectives on emerging tools such as artificial intelligence, automation, and data analytics.

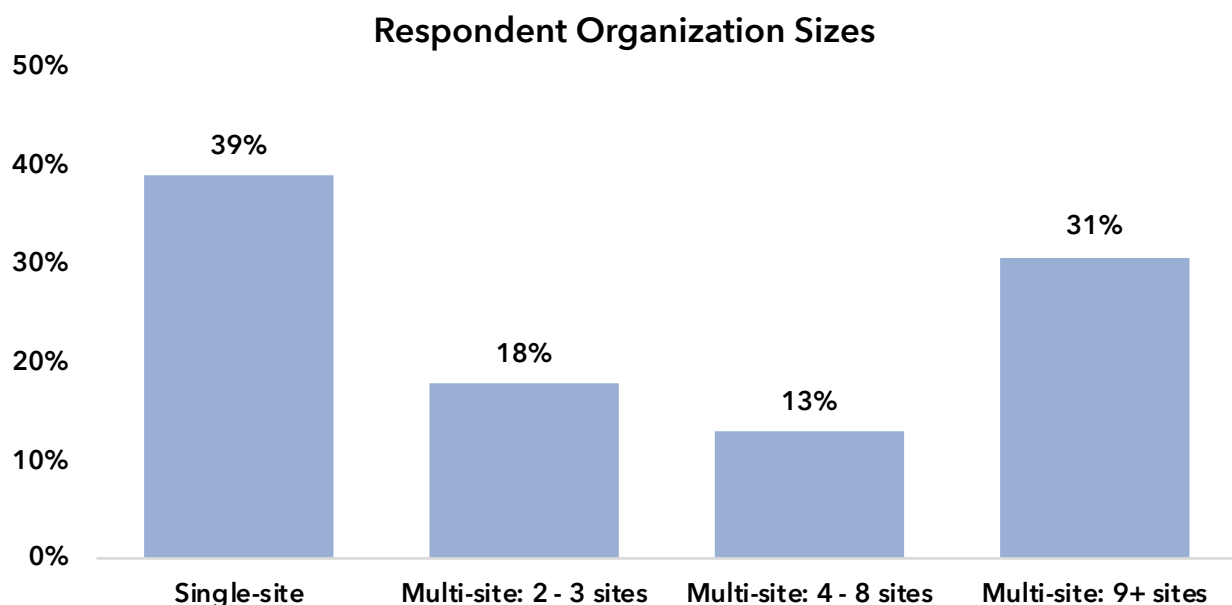
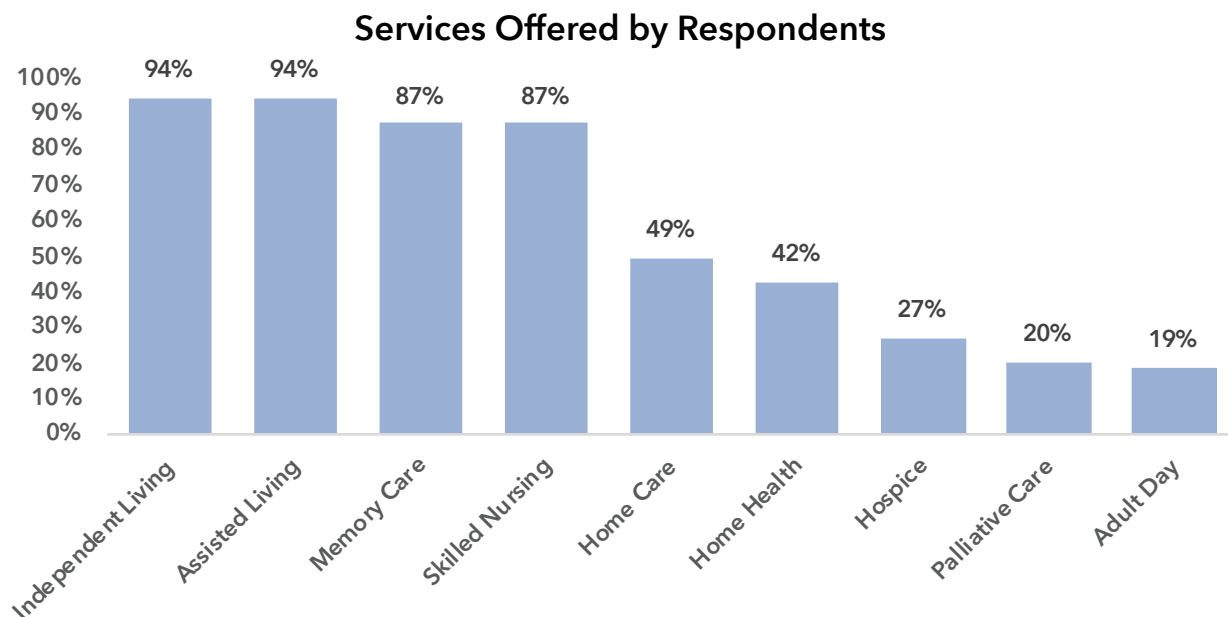
The findings reveal several consistent themes, explored throughout this report:

- **Technology is clearly a strategic priority for operators.** Most technology leaders are members of the C-suite and report directly to the CEO, 92% of responding organizations have a strategic IT plan, usually updated at least once a year, and there is a push toward measuring key performance indicators for new technologies to ensure ROI is achieved.
- **With exceptions such as EHR and scheduling, most technology segments are highly fragmented.** Even in categories such as HCBS support and cybersecurity testing, there are a handful of very large players competing against well over a dozen smaller vendors.
- **Select technologies have become virtually ubiquitous,** including EHRs, staff scheduling software, general ledger software, and cybersecurity testing solutions.
- **Boosting operational efficiency and improving resident care and experiences** are the primary drivers of new technology initiatives, while the greatest challenges to success are constrained staff, funding, and time.
- **Cybersecurity preparedness is strong** across most organizations and clearly a high priority, but challenges persist in training, infrastructure, and supporting resident learning, especially in a rapidly evolving threat environment.
- **Operators view advancements in AI as meaningful for their organizations but are still early in the adoption cycle.** Most respondents lack enterprise-wide competency and cite legal/regulatory issues and organizational readiness as top concerns, but at the same time are generally already using at least one LLM.
- **Data science and analytics** capabilities are still limited, especially among smaller organizations, though there is growing interest in expanding these functions.
- **While progress has been made in establishing metrics for success in new technology adoption, opportunities remain for providers to quantify the outcomes that drive a return on investment (ROI).** Most respondents (81%) set metrics for success when it comes to new technology adoption, but fewer than 40% actively measure the ROI achieved.
- **Operators rely on a variety of industry experts and partners for information on technology,** but desire clearer thought leadership in a crowded marketplace.
- **While residents' tech expectations are changing and accelerating rapidly,** they are not consistently engaged in decision-making.

Section I

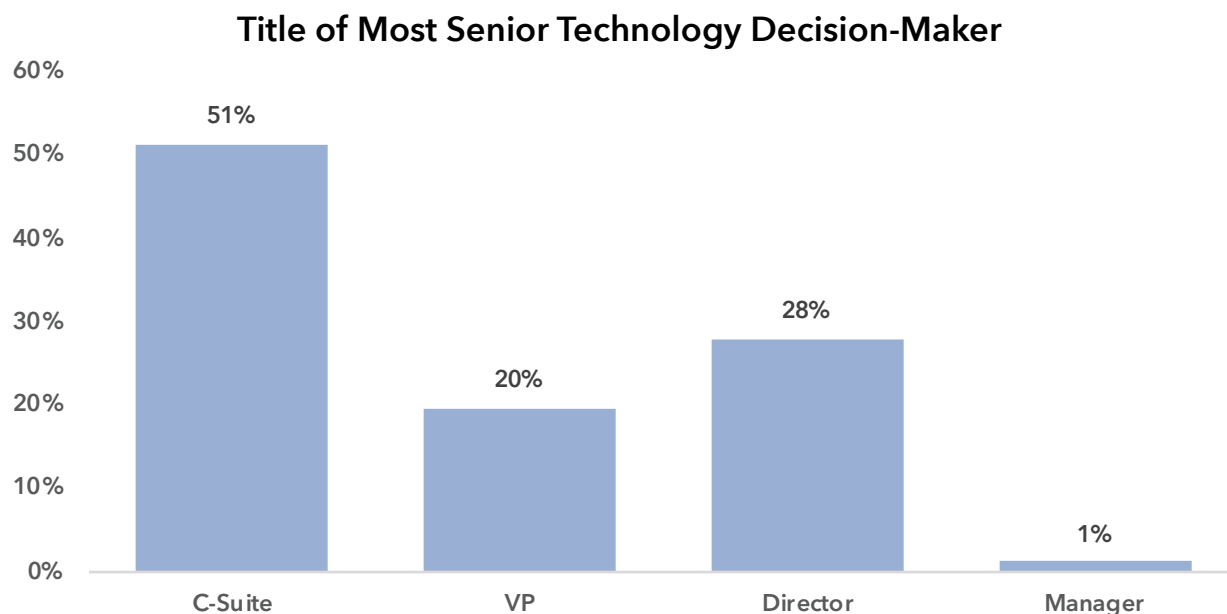
Organizational Dynamics

General Respondent Info

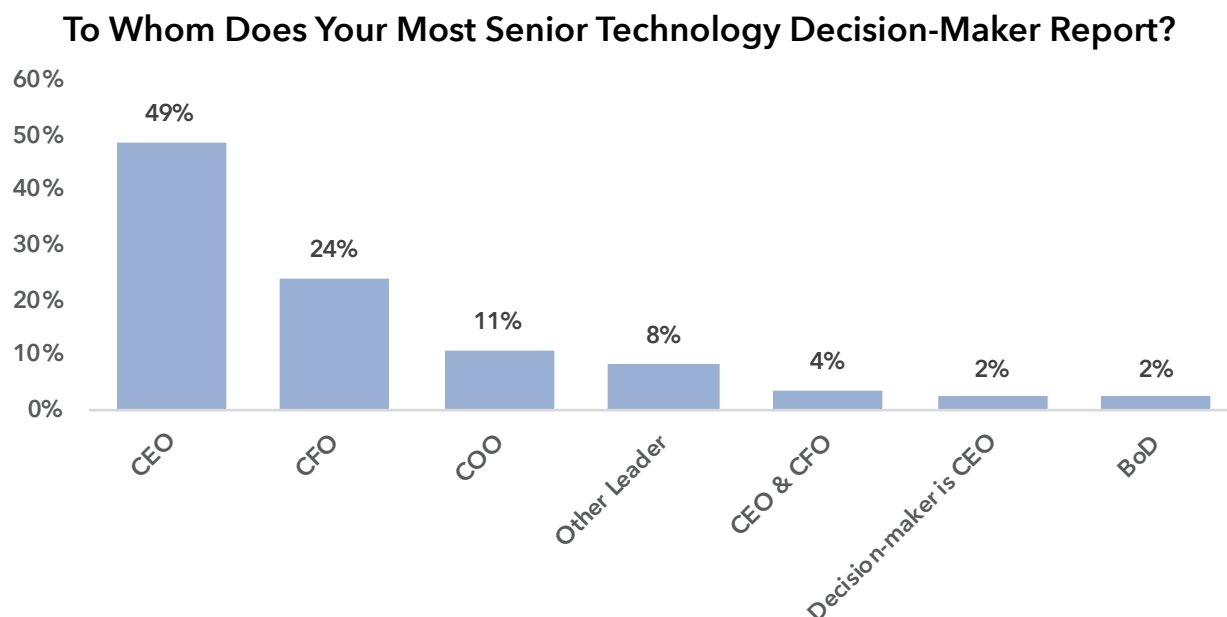


Respondents to the CTO Hotline survey represented a diverse cross-section of not-for-profit senior living and care providers, offering a broad perspective of current industry conditions. Over a hundred professionals responded to the survey.

Technology Leadership



In slightly over half of organizations, the top decision-maker for tech has a C-suite title. Titles include Chief Technology Officer, Chief Information Officer, Chief Innovation Officer, Chief Transformation Officer, Chief Operating Officer, and Chief Financial Officer. In a few instances, the Chief Executive Officer made the top tech decisions.

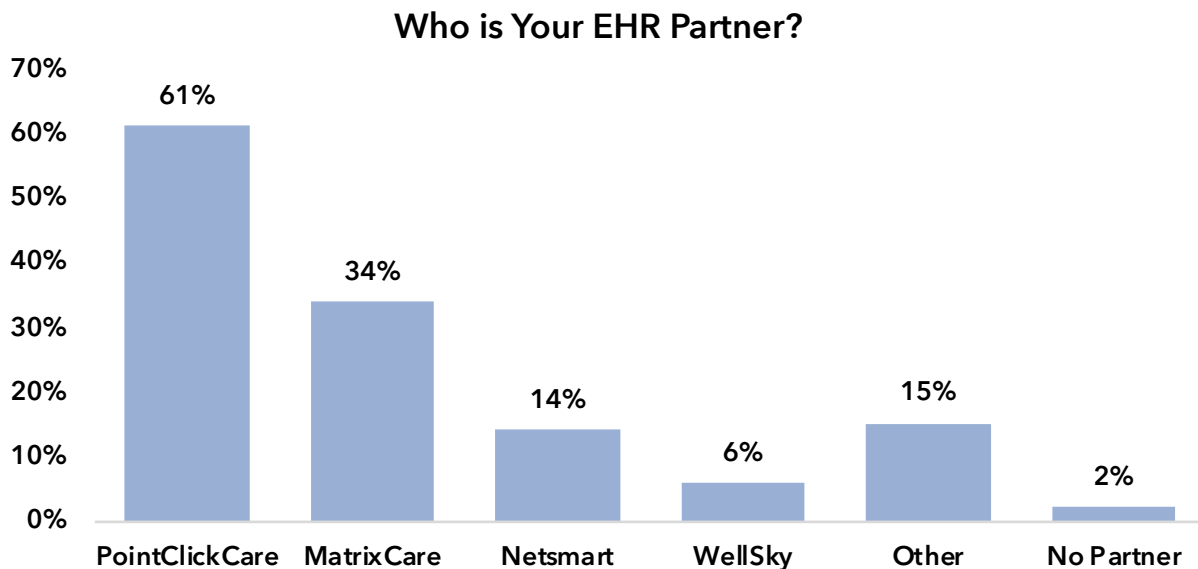


Nearly half of the responses reported that the most senior decision-maker for technology reports to the CEO, making it clear that technology decisions are integrated into the highest levels of organizational strategy. This likely supports digital transformation initiatives and enterprise-wide technology alignment. Finance and Operations are also significantly intertwined with tech, as CFOs and COOs are common executives for tech leaders to report to.

Section II

Technology Adoption

Electronic Medical/Health Records (EMR/EHR)



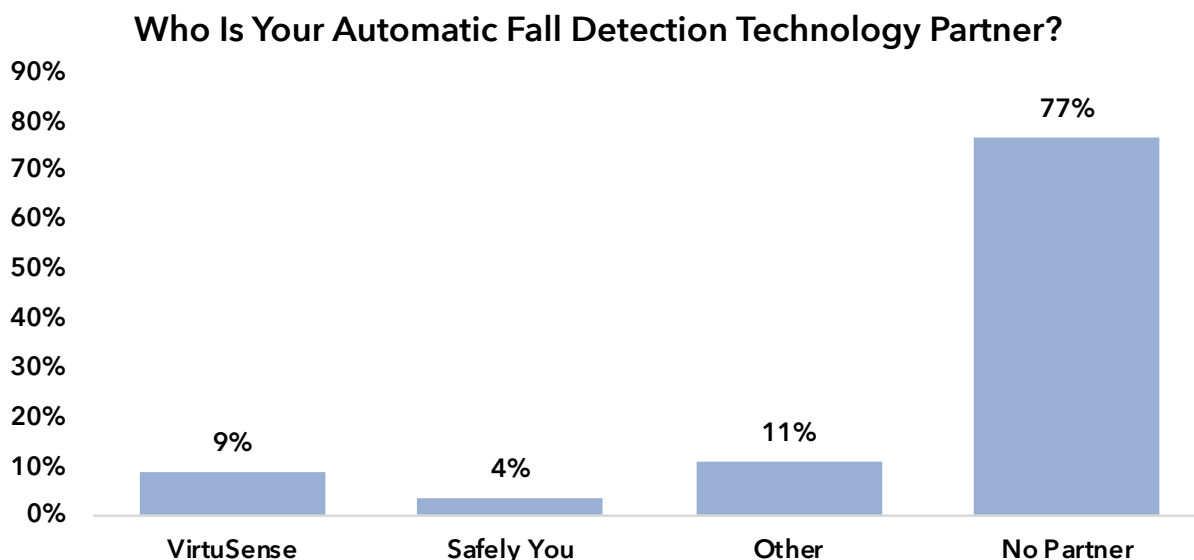
The vast majority of respondents reported using an electronic medical/health record (EMR/EHR) system, with only a few respondents indicating they did not have one in place. As was common across many technology types included in this survey, the EHR market is concentrated but also fragmented, with a couple of very popular providers and then a large number of less popular partners receiving a few mentions each.

PointClickCare emerged as the dominant EHR provider among multi-site operators. In contrast, single-site operators were more evenly split, reporting roughly equal adoption of PointClickCare and MatrixCare.

EHRs by Organization Size				
	PointClickCare	MatrixCare	Netsmart	WellSky
Single-Site	42%	48%	6%	3%
Multi-site: 2 - 3 sites	73%	20%	7%	0%
Multi-site: 4 - 8 sites	82%	18%	9%	9%
Multi-site: 9+ sites	69%	31%	31%	12%

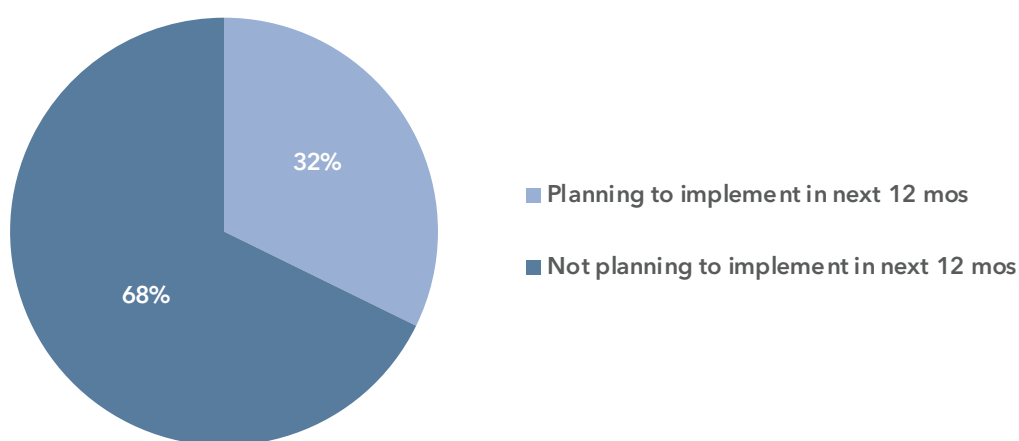
Additionally, it was not uncommon for respondents to report using more than one EHR system: 17% used two or more EHRs, with a handful reporting using as many as four.

Automatic Fall Detection Technologies



The survey data on automatic fall detection technology reveals relatively low adoption and a highly fragmented vendor landscape. VirtuSense and Safely You were the most frequently cited fall detection partners, with another 11% of respondents reporting using other vendors, underscoring the fragmented nature of the market.

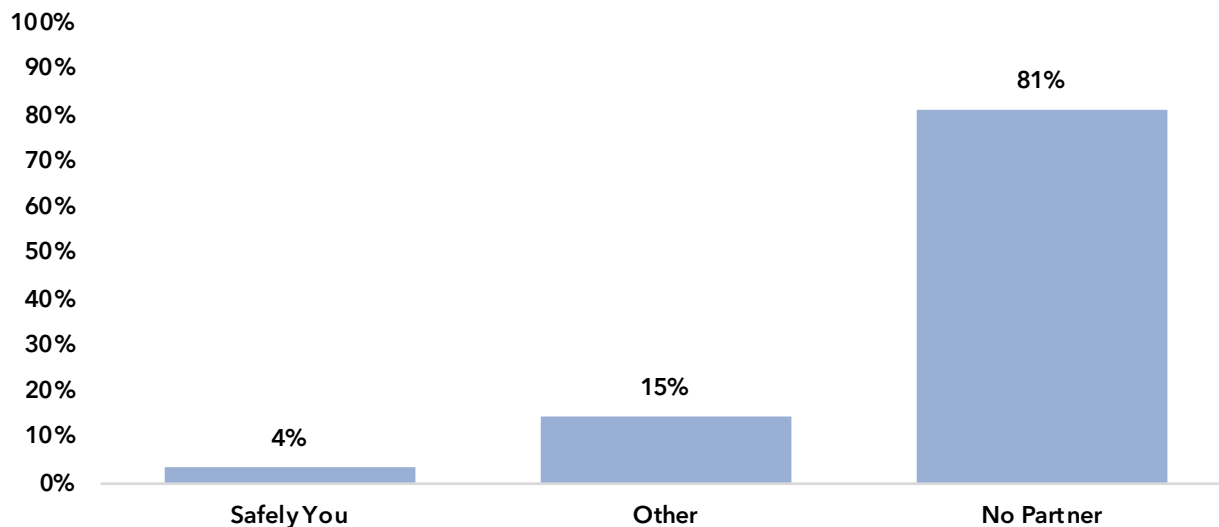
If You Do Not Have an Automatic Fall Detection Technology, Do You Plan to Implement One?



Despite the currently low uptake, there is momentum building. According to the data, 32% of those without a partner plan to implement automatic fall detection technology within the next 12 months. This suggests a growing awareness of fall detection's importance and a potential increase in adoption in the near future, even as the market remains spread across a large number of providers and lacks a clear dominant provider.

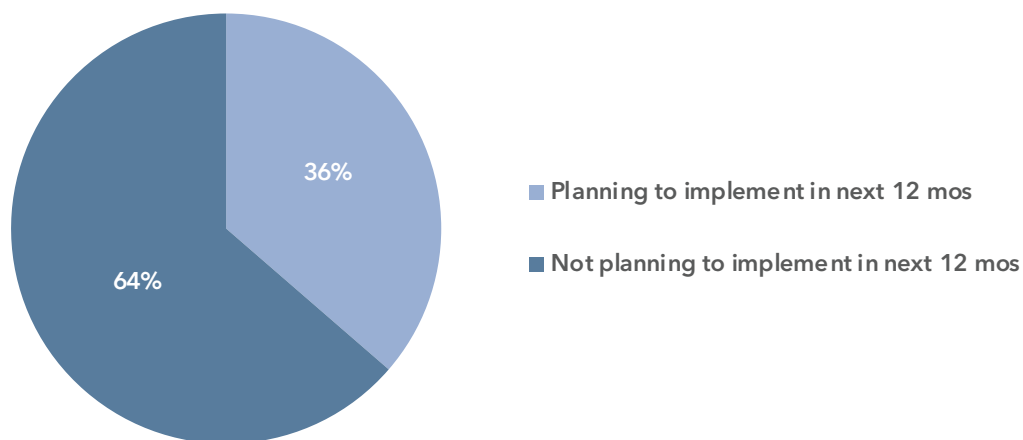
Passive Monitoring Technologies

Who is Your Passive Monitoring Technology Partner?



Among the small number of survey respondents using a passive monitoring technology solution, Safely You had the single most mentions at a mere 4% use rate. 15% of respondents cited using different vendors, most of which had just one mention apiece, reflecting another low-adoption, high-fragmentation senior living and care technology market segment.

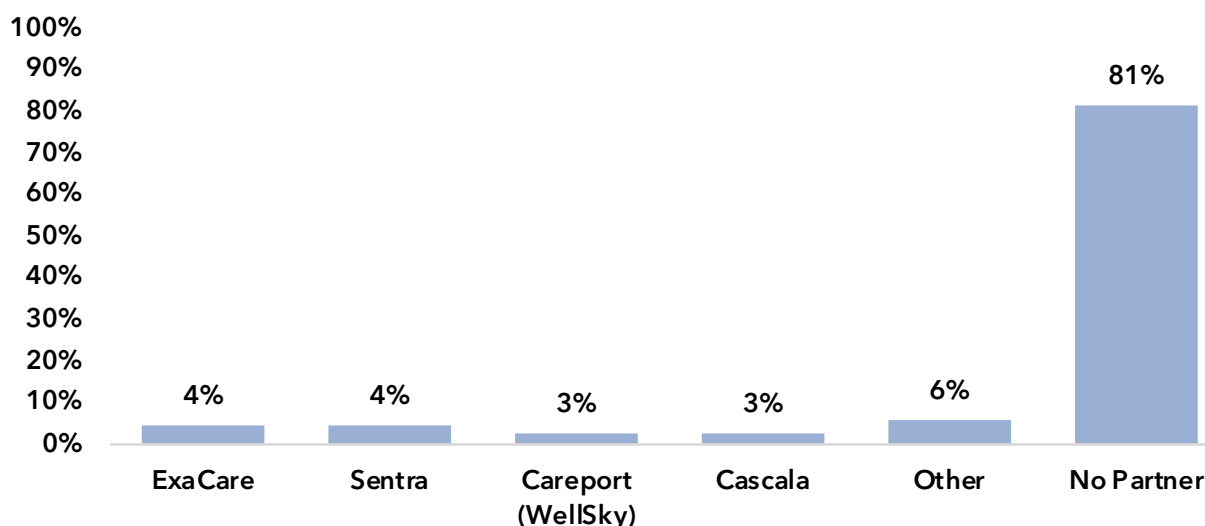
If You Do Not Have a Passive Monitoring Technology, Do You Plan to Implement One?



This also appears to be an early-stage, emerging segment. 82% of survey respondents reported not having any passive monitoring technology partners. However, of those without a partner, roughly a third expect to implement passive monitoring within the next 12 months, signaling moderately growing interest in these solutions.

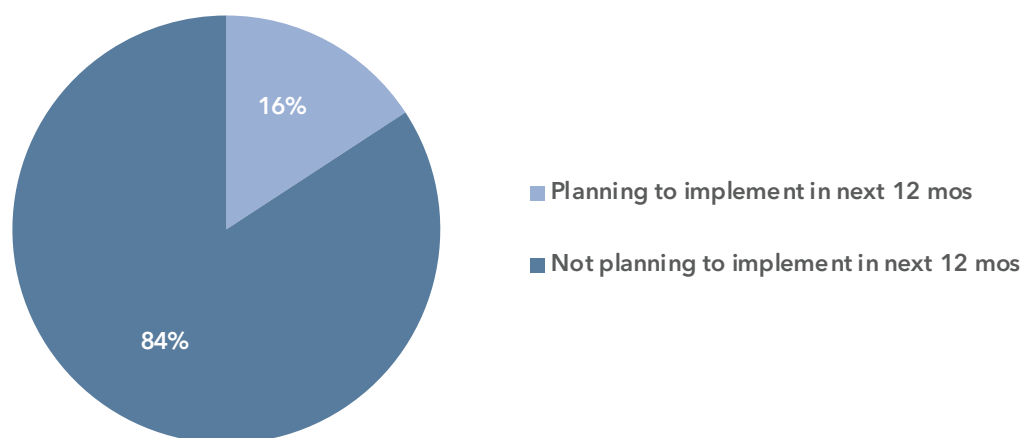
Post-acute Referral Management Technologies

Who is Your Post-acute Referral Management Technology Partner?



While overall usage of post-acute referral management technology is sparse, the segment appears to be gaining young new entrants. A handful of vendors including ExaCare, Sentra, Careport (WellSky), Cascala, and several others were mentioned by survey respondents. However, no single partner has emerged as a clear market leader.

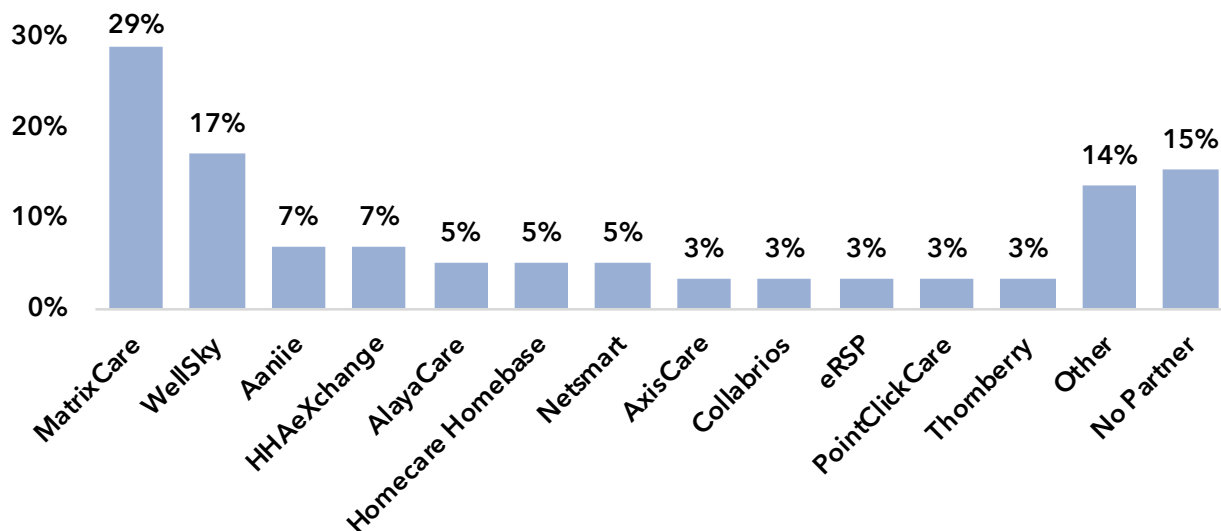
If You Do Not Have a Post-acute Referral Management Technology, Do You Plan to Implement One?



81% of respondents reported having no current technology partner for post-acute referral management. Among these, only 16% indicated plans to implement such a solution in the next 12 months, suggesting this is not a priority for many operators. We suspect this is partially due to the rapid evolution of AI, which has enabled technologies addressing this issue to emerge en masse in a matter of months, with market awareness still catching up. We also believe these results would differ in the for-profit sector, where large concentrations of post-acute beds are more common and careful referral management is therefore more likely to be mission-critical.

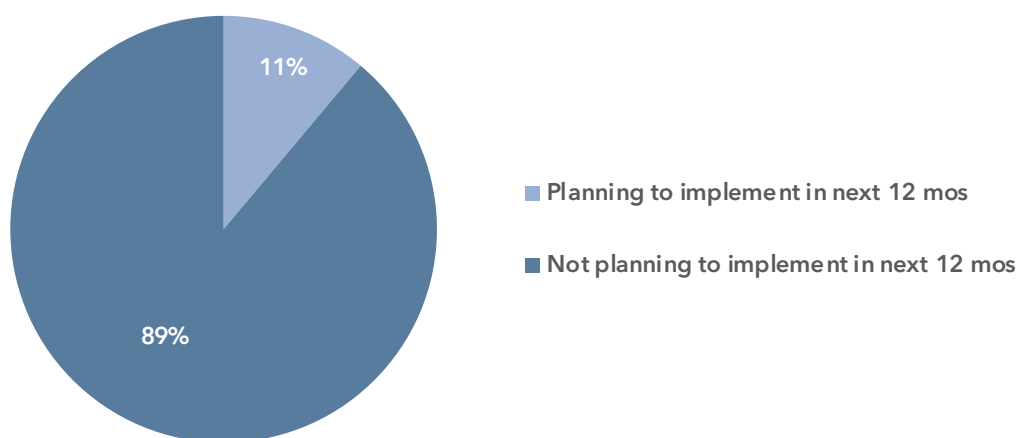
Home- and Community-Based Services (HCBS) Technologies

Who is Your Technology Partner to Support HCBS?



For HCBS management, MatrixCare is the clear technology leader with 29% of respondents who offer HCBS services using MatrixCare to manage them. MatrixCare apparently has a stronger foothold in HCBS compared to its positioning in the broader EHR market, with PointClickCare falling much farther down the field for this specialty category. 19 companies split the rest of the market: like the general EHR market, the HCBS segment has a couple of significant players and a large number of smaller specialty providers downfield.

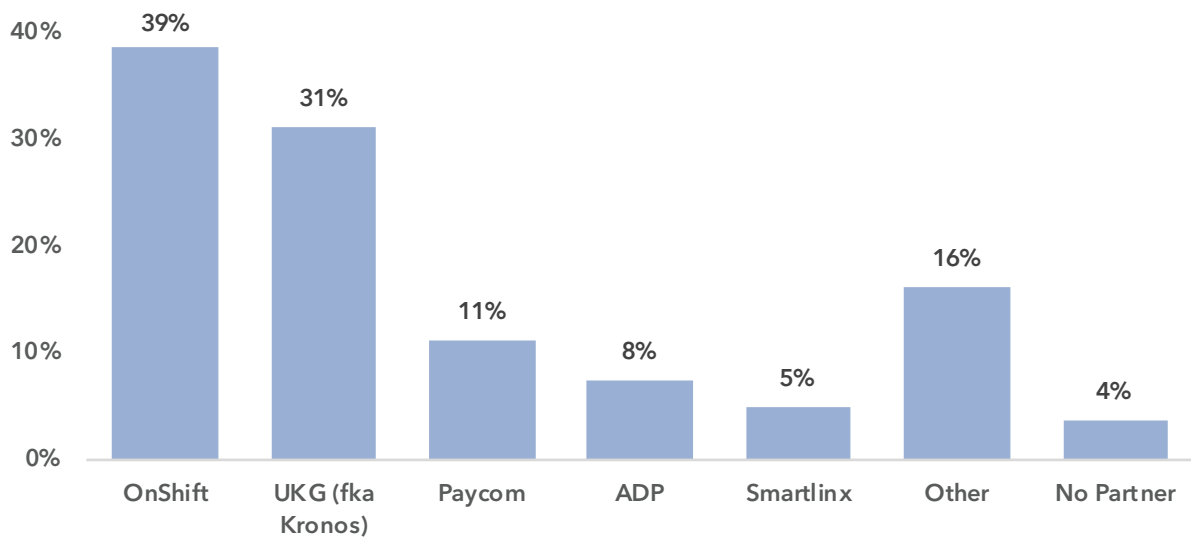
If You Do Not Have a Technology Solution to Support HCBS, Do You Plan to Implement One?



15% of respondents who said they offered HCBS indicated that they do not have an HCBS technology partner and of these, roughly one in ten plan to implement such a technology in the coming year. This indicates that while the HCBS tech vendor landscape is active, the market is likely to remain highly competitive and fragmented, with many providers opting for in-house management without a vendor partner.

Staff Scheduling Softwares

Who is Your Staff Scheduling Software Partner?



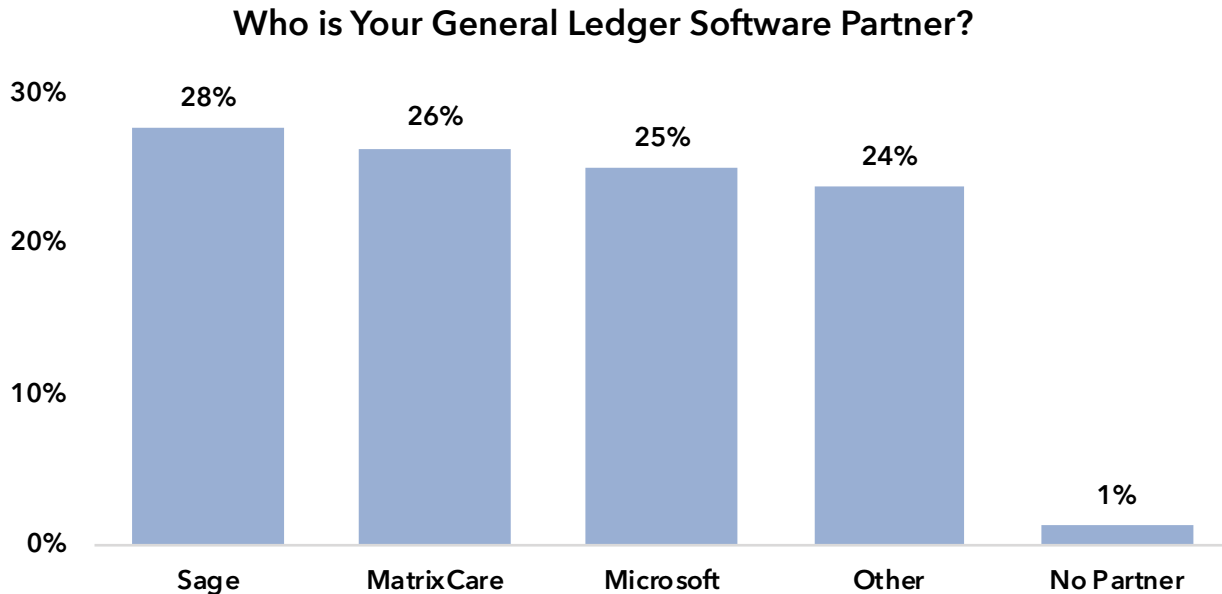
Nearly all respondents, 96%, reported using staff scheduling software, demonstrating widespread adoption across the industry. While more than a dozen scheduling platforms were mentioned, the field is led by a few key players. OnShift and UKG (formerly Kronos) appear to dominate overall, with a moderate amount of usage of other vendors.

Staff Scheduling Softwares by Organization Size

	OnShift	UKG (fka Kronos)	Paycom	ADP	Smartlinx
Single-Site	35%	23%	26%	6%	3%
Multi-site: 2 - 3 sites	43%	29%	0%	7%	14%
Multi-site: 4 - 8 sites	36%	45%	9%	0%	9%
Multi-site: 9+ sites	42%	38%	0%	13%	0%

Breaking down this data by operator size shows some interesting trends. OnShift and UKG are nearly equally popular among multi-site operators, but among single-site providers, Paycom joins OnShift and UKG as a top choice, showing that smaller organizations may prioritize different features or pricing models. While the overall market is relatively consolidated at the top, the variety of niche solutions also reflects ongoing experimentation and tailoring to different operational scales.

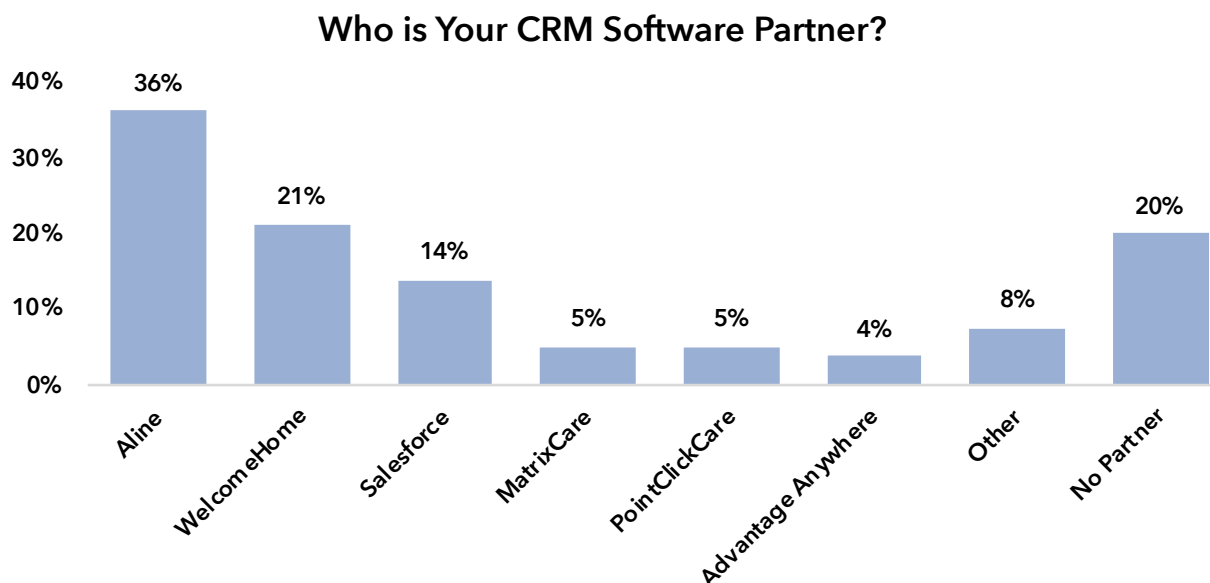
General Ledger Softwares



The data on general ledger software partners shows very high adoption, with only one responding organization reporting no partner. The market appears to have three major leaders (Sage, MatrixCare, and Microsoft) but a significant number of smaller vendors received a handful of mentions apiece. This indicates a diverse but top-heavy market.

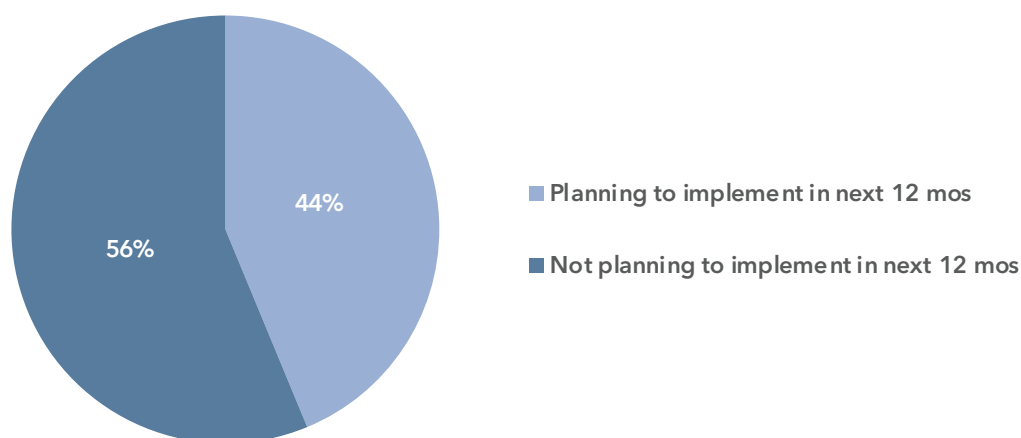
The strong showing from Microsoft likely reflects its broad integration capabilities and familiarity, while Sage and MatrixCare may offer specialized accounting functions tailored to the healthcare settings they focus on. Overall, the data suggests a well-penetrated and competitive market, with organizations leveraging a mix of mainstream and niche platforms to manage their general ledger needs.

Customer Relationship Management (CRM) Softwares



CRM software adoption among respondents reveals a competitive and varied market, with a notable 20% reporting having no such partner today. Among existing CRM users, Aline (including Enquire/Sherpa) is the most widely used at 36% of respondents, followed by WelcomeHome and Salesforce. Smaller players like MatrixCare, PointClickCare, and Advantage Anywhere each received a handful of mentions, while five other vendors were mentioned just once or twice each, highlighting another diverse technology landscape, particularly among single-site operators.

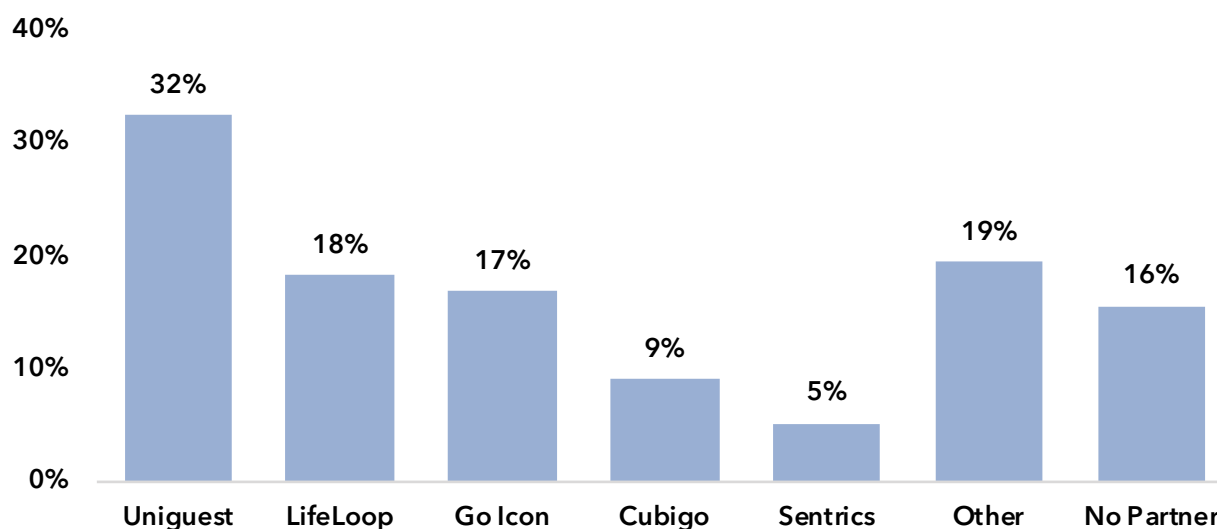
If You Do Not Have a CRM, Do You Plan to Implement One?



While a meaningful percentage of respondents - roughly 20% - reported not having a CRM today, 44% of those plan to implement one in the coming year, indicating that CRM usage is becoming a norm and an expectation.

Social Connectedness and Engagement Technologies

Who is Your Social Connectedness and Engagement Technology Partner?

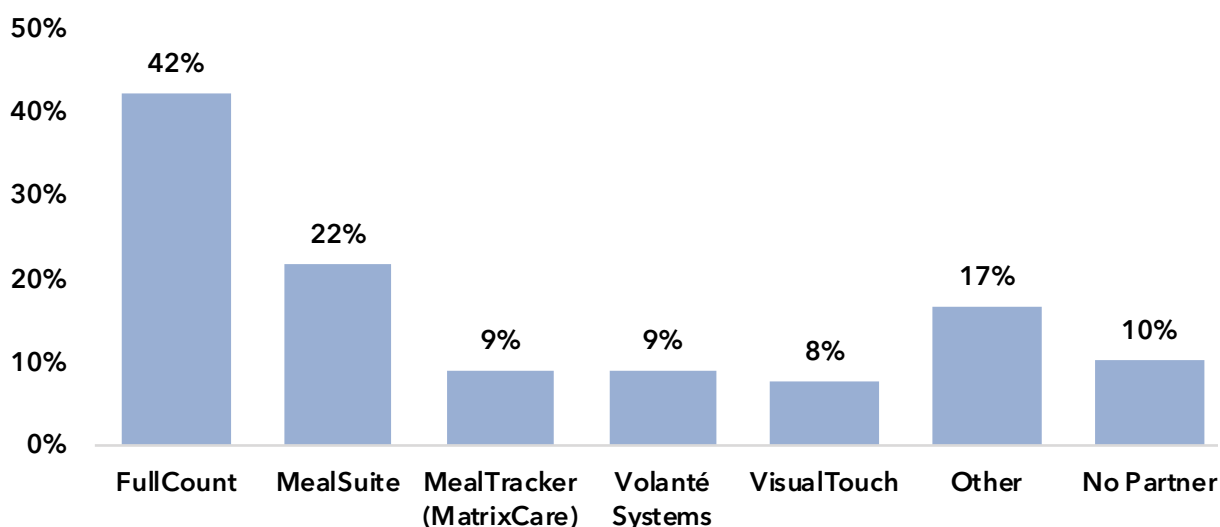


The data on social connectedness and engagement technology reveals a fractured market, with responses spread across a wide range of providers, but one vendor leading the way - Uniquist. Other players like LifeLoop and Go Icon had more modest representation at about 17-18% apiece. Additionally, over a dozen providers received just a few mentions apiece, reflecting the broad diversity of solutions being used in this space.

Notably, 16% of respondents reported having no current partner. The widespread distribution of vendors suggests organizations are still experimenting with or tailoring solutions to their specific needs - unsurprising for a technology category focused on responding to the diverse social, emotional, and logistical needs of residents, which may differ substantially between communities. This lack of consolidation underscores an evolving market with room for innovation and growth.

Digital Dining Service Softwares

Who is Your Digital Dining Service Software Partner?

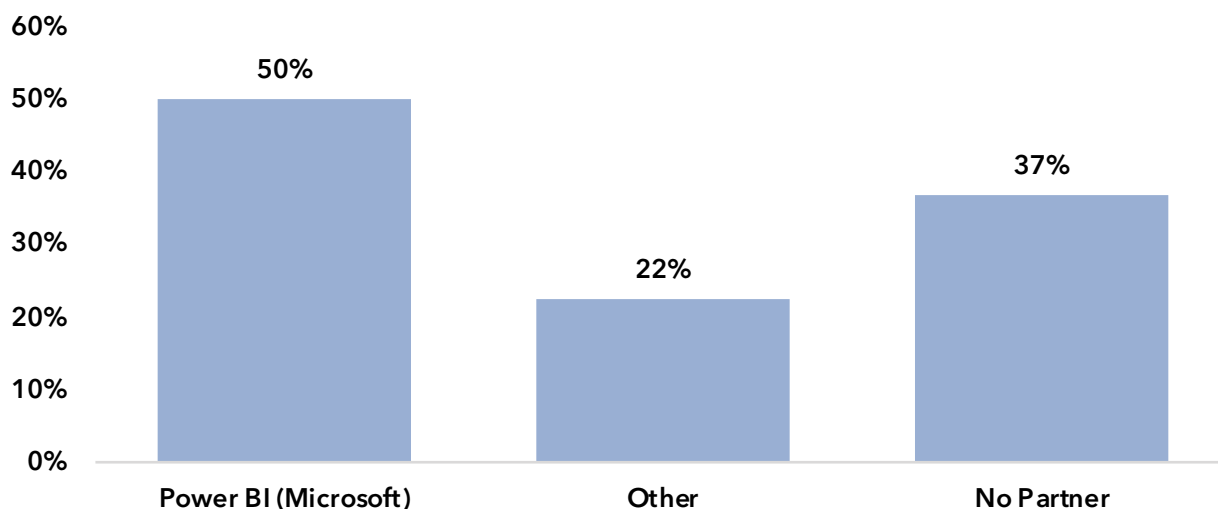


While a wide range of digital dining service vendors were mentioned, FullCount stands out as the leader with nearly double the number of mentions as the next most common provider, MealSuite. Other notable players include MealTracker (MatrixCare), Volanté Systems, and VisualTouch. Eight other vendors received only a few mentions each, highlighting opportunities for market consolidation.

Only 10% of respondents reported not having a partner, indicating that digital dining software is commonplace in the industry. The high number of small and niche providers suggests that many organizations are selecting solutions tailored to their specific operational needs, further reinforcing the customized and dispersed nature of the market.

Data Analytics Softwares

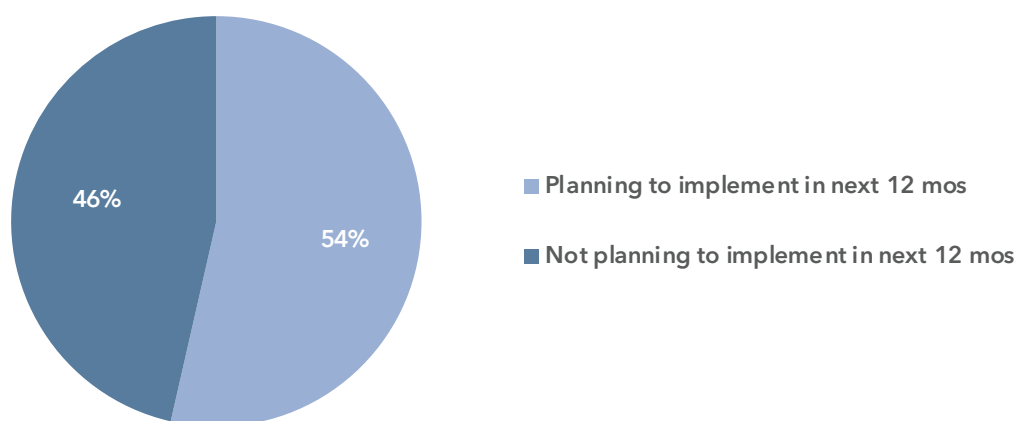
Who is Your Data Analytics Software Partner?



While a majority of respondents use a data analytics platform, a significant portion (37%) still do not. Power BI (Microsoft) leads the space by a significant margin. 11 other solutions received a few mentions apiece, overwhelmed by Power BI's 50% market share.

Lack of analytics tools is especially pronounced among smaller organizations. 63% of single-site respondents and 43% of 2-3-site operators reported not using any analytics platforms.

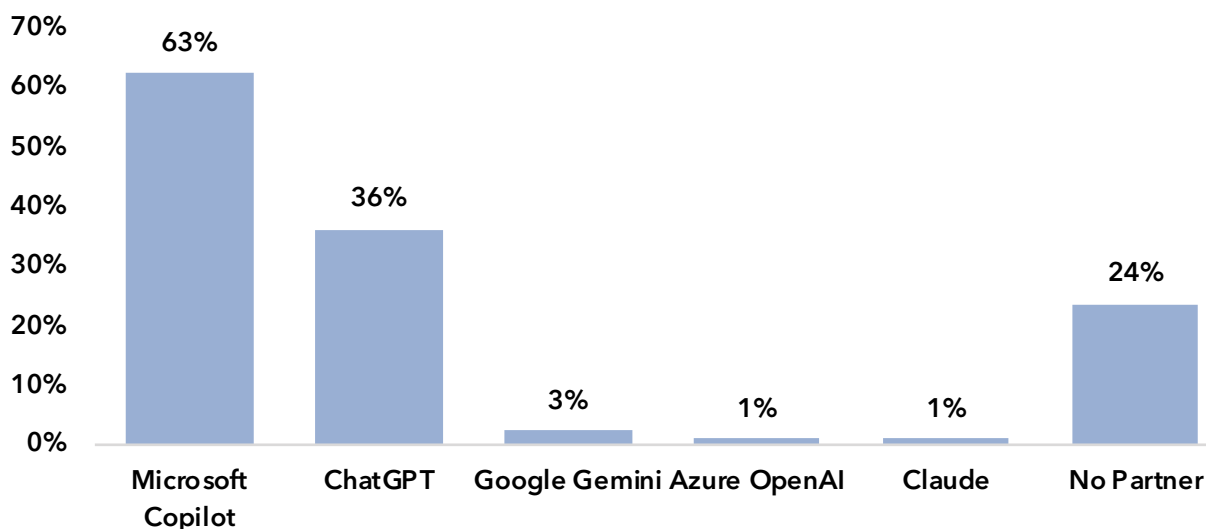
If You Do Not Have a Data Analytics Software, Do You Plan to Implement One?



However, there is momentum toward broader adoption: among those currently without a partner, 54% plan to implement a solution within the next 12 months. This suggests that while analytics adoption is uneven, particularly among smaller providers, there is growing interest in integrating data tools to support decision-making.

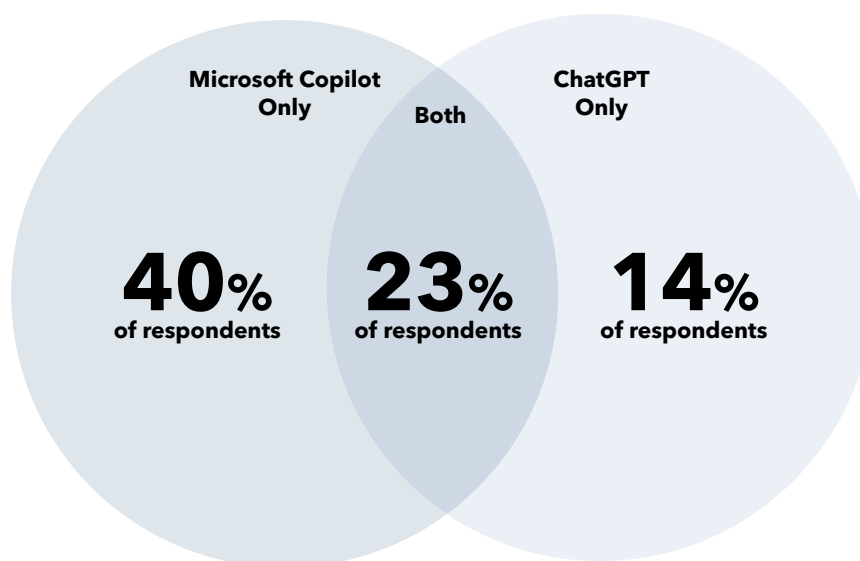
Large Language Models (LLM)

Who is Your LLM Partner?



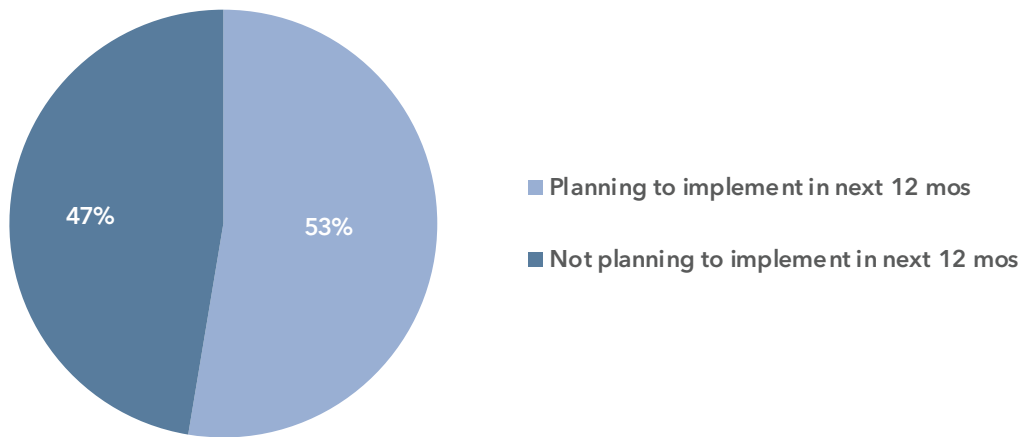
The survey results on LLM adoption show strong engagement with AI tools. Microsoft Copilot is the leading solution in this industry, used by 63% of respondents, while ChatGPT follows with 36%. Adoption rates for other LLMs such as Google Gemini, Azure OpenAI, and Claude remain minimal, each mentioned only once or twice.

Microsoft Copilot and ChatGPT: Commonly Used Together



Notably, there is a high degree of overlapping usage: for instance, 23% of respondents use both Copilot and ChatGPT. This demonstrates that many organizations are leveraging multiple LLMs concurrently, likely to meet a variety of operational or use-case-specific needs. This overlap highlights an emerging trend where organizations are building hybrid AI ecosystems to address needs in different departments or functions, and to learn more about the differing capabilities of these rapidly evolving tools.

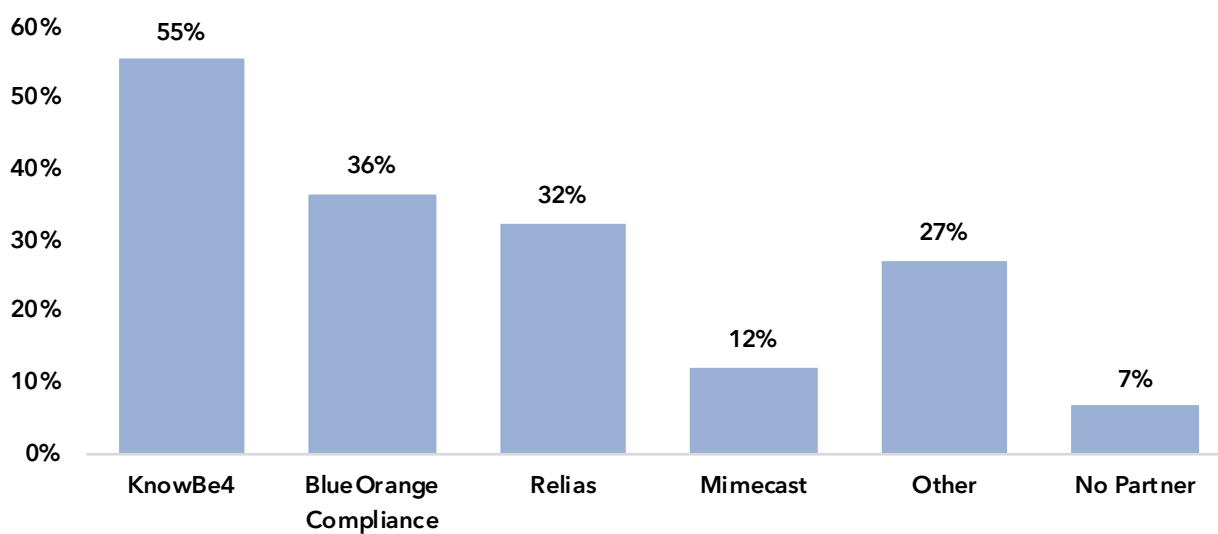
If You Do Not Have an LLM, Do You Plan to Implement One?



Among the 24% of respondents currently without an LLM partner, 53% plan to implement one within the next 12 months, suggesting continued momentum in this space.

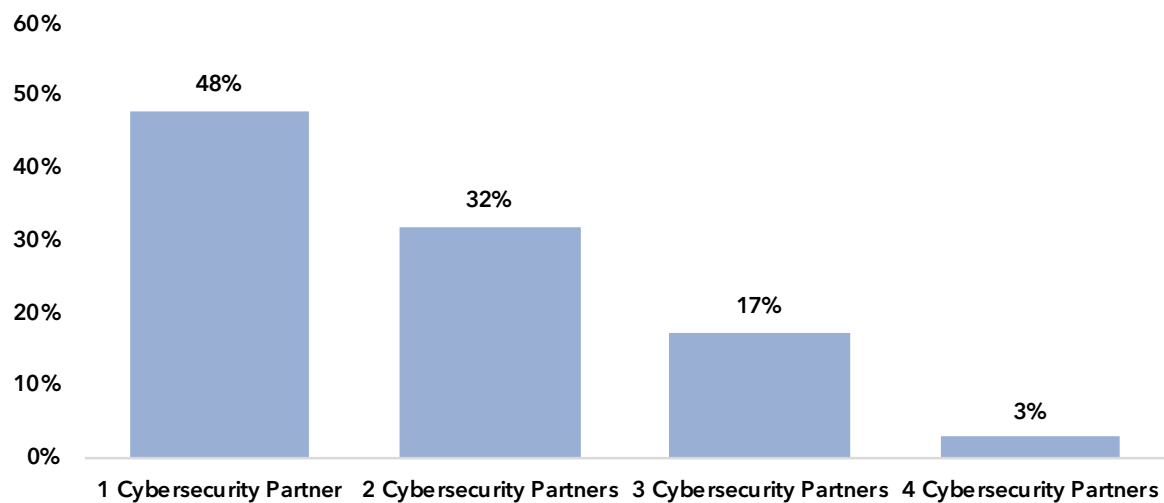
Cybersecurity Testing Solutions

Who is Your Cybersecurity Testing Solution Partner?



The cybersecurity testing solution landscape is characterized by both vendor variety and the common use of multiple providers concurrently. The leading provider is KnowBe4, followed by BlueOrange Compliance, and then Relias, with Mimecast trailing in fourth place. The wide-ranging “Other” category reflected in this chart included 17 additional vendors receiving a few mentions apiece. Only 7% of respondents reported having no partner at all, indicating near-universal engagement in cybersecurity testing.

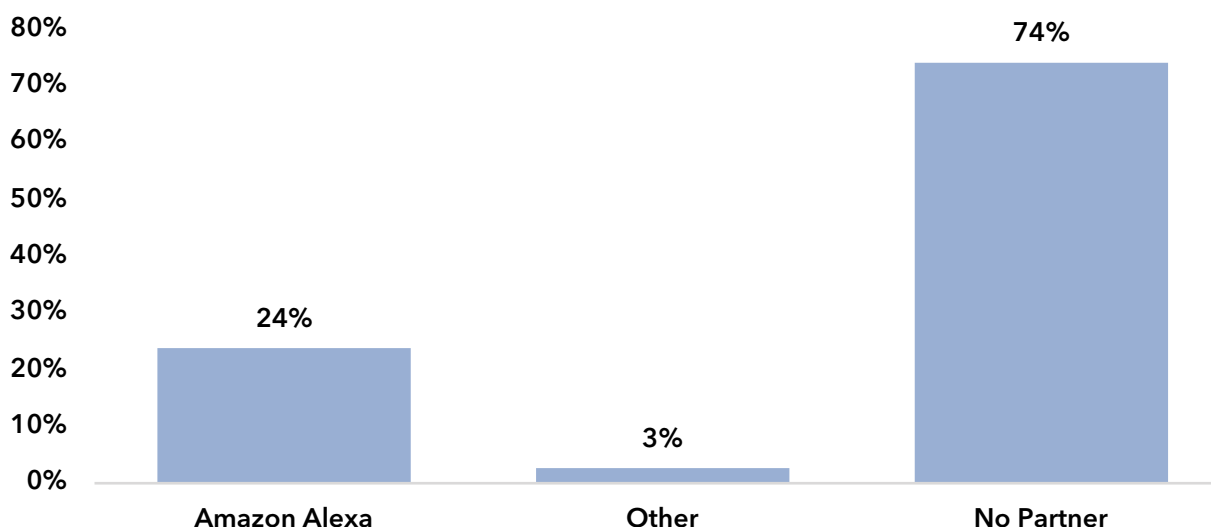
Use of Multiple Cybersecurity Testing Partners Concurrently



A key trend is the prevalence of multi-vendor strategies with over half of respondents using more than one partner for cybersecurity testing. This layered approach reflects the growing complexity and importance of cybersecurity in senior living and care operations, as organizations seek to diversify their risk coverage and toolsets by combining compliance, training, threat detection, and email security solutions across vendors.

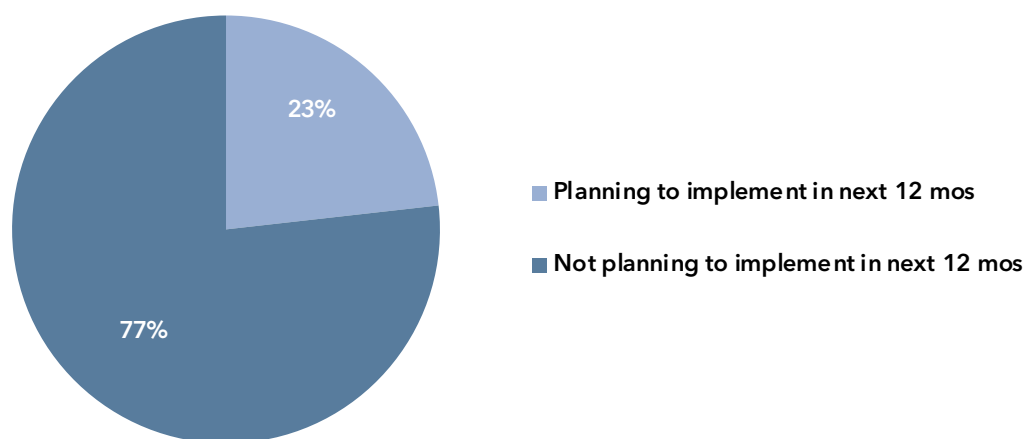
Fleet-Managed Smart Home Devices

Who is Your Fleet-Managed Smart Home Device Partner?



Fleet-managed smart home device adoption shows low overall usage but emerging interest in growth. Amazon Alexa is the only widely used platform, cited by 24% of respondents. Just 3% reported using an alternative provider, while 74% reported having no partner at all, suggesting this is still a nascent technology category in many communities. It is likely that in many communities, residents commonly “BYOD” (bring your own device), implementing their own smart home solutions in their units. Such solutions were excluded from this question, which focused on fleet-managed devices.

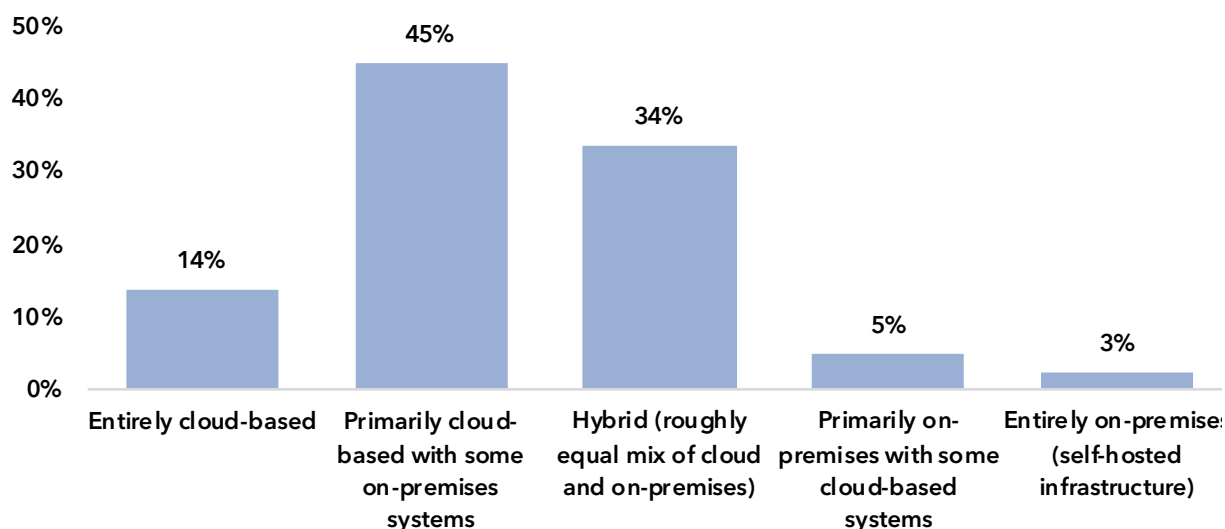
If You Do Not Have a Fleet-Managed Smart Home Device Partner, Do You Plan to Implement One?



Despite limited current adoption, there is clear momentum building: 23% of those without a fleet-managed smart home device partner plan to implement one within the next 12 months. This signals moderate potential expansion in this space and a growing interest in the relative benefits of centralized device management versus BYOD approaches.

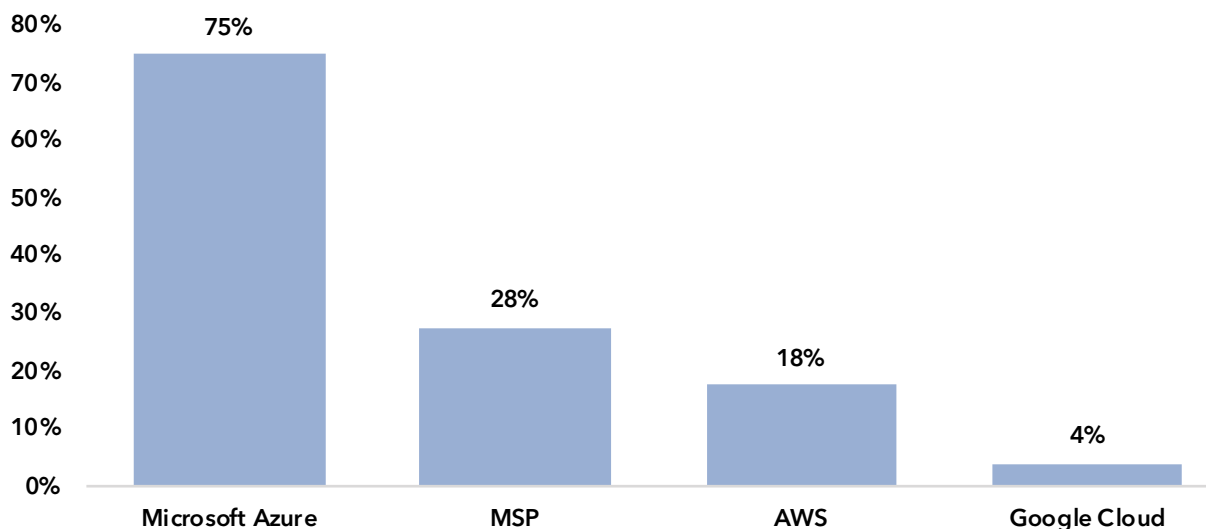
Computing Models and Cloud Providers

What is Your Organization's Current Primary Computing Model?



Survey responses on primary computing models reveal a clear industry shift toward cloud adoption. 45% of respondents report being primarily cloud-based with some on-premises systems, while another 14% are entirely cloud-based. Only a small minority, roughly 8%, rely mostly or entirely on on-premises solutions.

Which Cloud Providers or Platforms do You Currently Rely on?



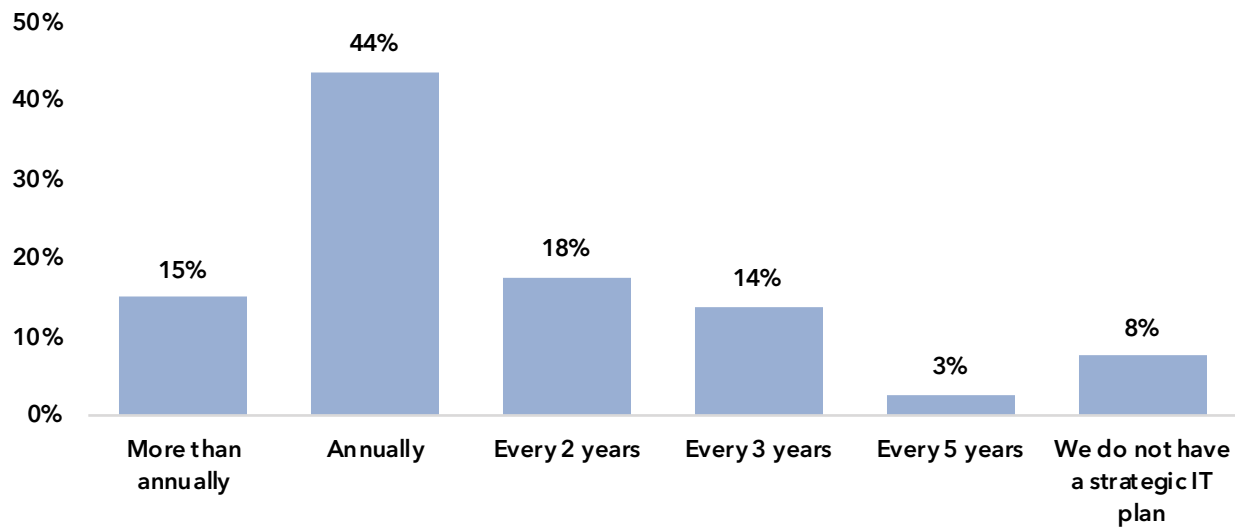
When it comes to cloud platforms, Microsoft Azure is the most widely used by a meaningful margin, with 75% of respondents naming it as their sole cloud provider or one of their cloud providers. This far exceeds usage of MSPs, AWS, and Google Cloud. The heavy reliance on Azure aligns with its integration into Microsoft's broader suite of enterprise tools, which had demonstrated popularity in other survey questions. Overall, these findings suggest a strong cloud orientation, particularly centered on Microsoft platforms, with limited dependence on alternative cloud infrastructure providers.

Section III

Technology Planning

Strategic IT Planning

How Often do You Update Your Strategic IT Plan?

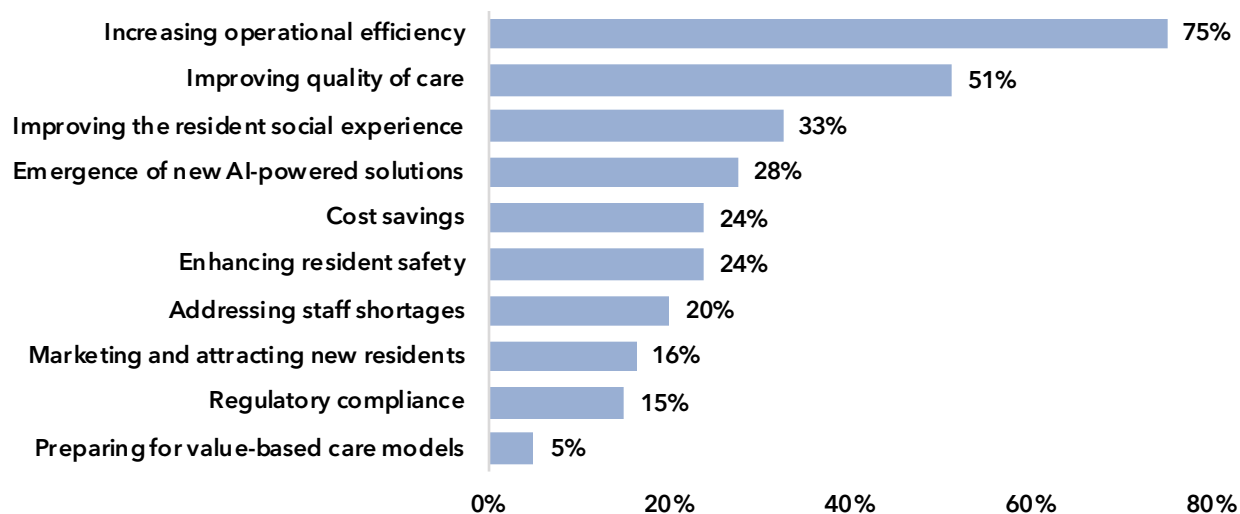


Nearly 60% of respondents review or update their organization's strategic IT plan at least annually, with 44% doing so annually and 15% more frequently than once a year. This reflects a strong commitment to keeping IT strategies aligned with organizational goals and technological advancements, as well as awareness that falling behind on the market's rapid changes can lead to serious organizational detriment.

Notably, only 8% of respondents reported not having a strategic IT plan at all, indicating that the vast majority of organizations recognize the importance of formal IT planning.

Motivators for Adopting New Technology

What are the Top Three Motivators Driving New Technology Initiatives at Your Organization?



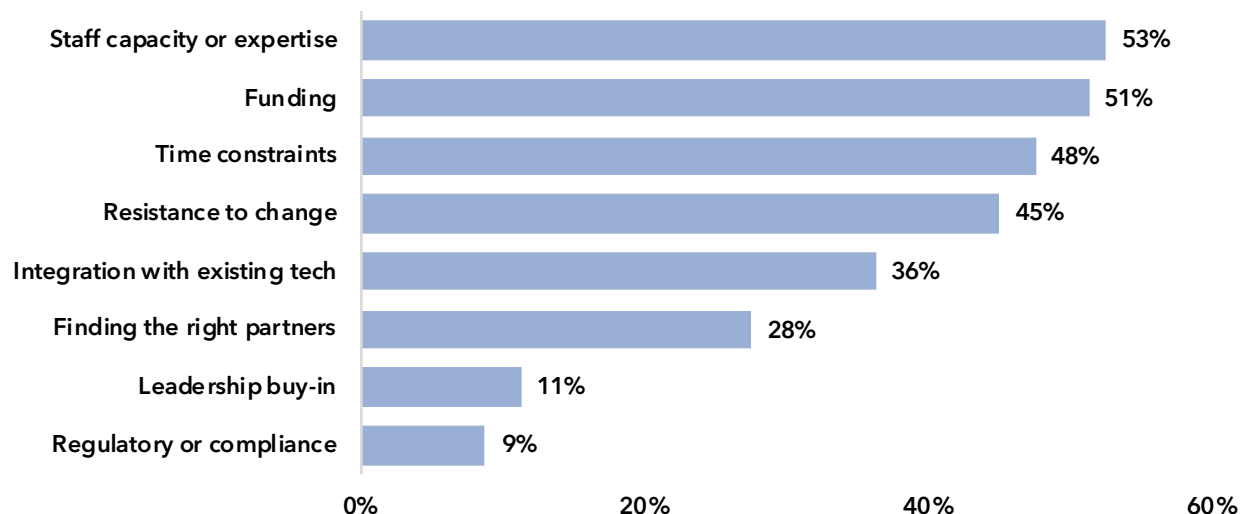
According to 75% of survey participants, a desire to boost operational efficiency is among the most pressing reasons for adopting new technology initiatives. This is followed by improving the quality of care, which was cited by 51% of respondents, underscoring a dual focus on both organizational performance and resident outcomes.

Other motivators, such as enhancing the resident social experience, exploring AI-powered solutions, and achieving cost savings or improving safety, were mentioned less frequently but still indicate an interest in innovation and value.

Notably, only 5% of respondents identified preparation for value-based care (VBC) models as a key motivator, suggesting that, for most, VBC is not currently a major influence on technology strategy and potentially may not be part of organizational strategy at all yet. Overall, the data suggests that current tech investments are primarily driven by efficiency gains and care quality improvement.

Barriers to Adopting New Technology

What are the Top Three Barriers Your Organization Faces in Effectively Implementing New Technology Initiatives?

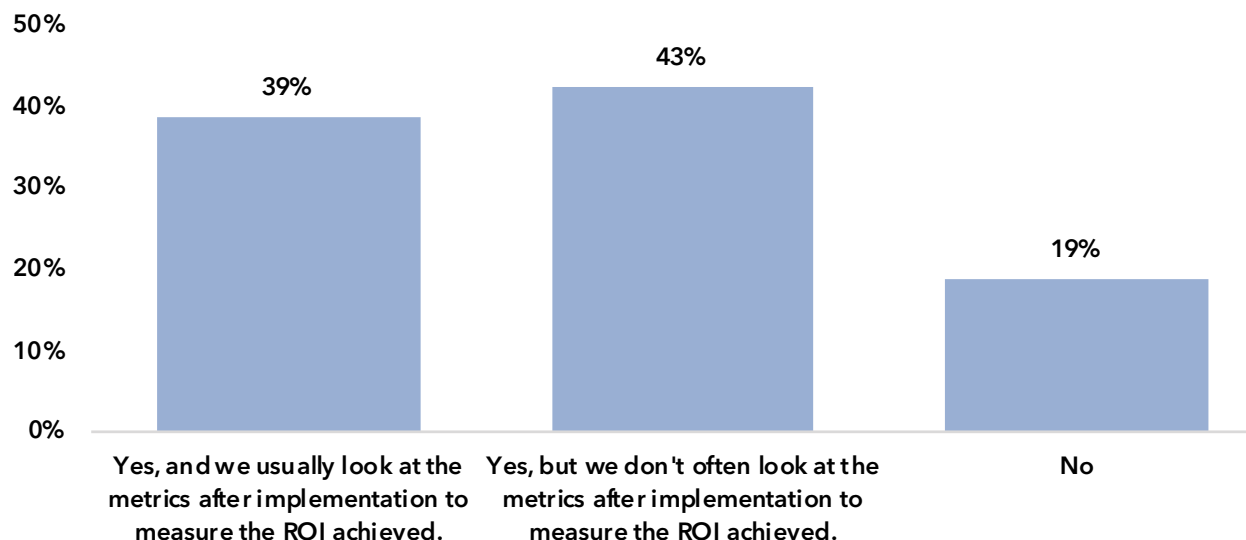


The greatest challenges to implementing new technology initiatives for senior living and care organizations boil down to limitations on internal resources, particularly insufficient staff capacity and expertise, inadequate funding, and time constraints. Organizational culture can also challenge technology adoption, with internal resistance to change identified as a top-three barrier by 48% of respondents; garnering sufficient leadership buy-in to launch new technology was relatively uncommon to rank as a concern, but it is important to bear in mind that most respondents were themselves leaders.

By contrast, external challenges such as regulatory compliance and difficulty identifying appropriate partners were cited infrequently. This suggests that while organizations are generally aligned on strategic intent to embrace new technology, they are struggling with the day-to-day realities of execution. The results highlight a critical need for solutions that reduce complexity, ease integration, and provide more accessible support models for resource-strapped teams.

Measuring Technology Success

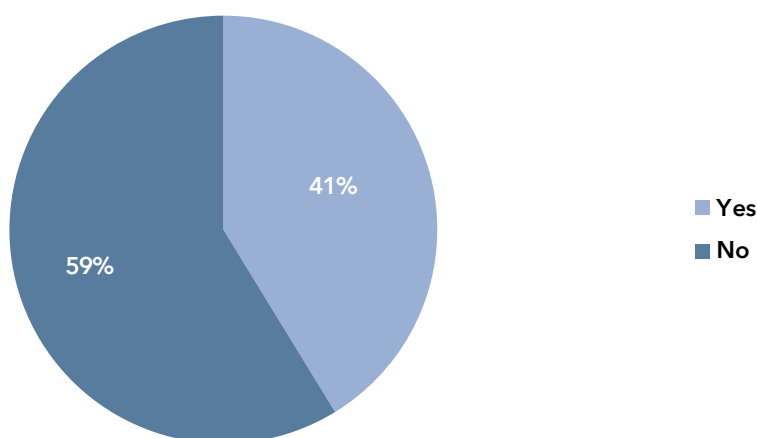
When You Implement New Technology Solutions, Do You Set Metrics for Success?



Most organizations report that they regularly establish success metrics when implementing new technology; however, a large portion of them do not follow up post-implementation to evaluate whether those goals were met. While 81% say they define metrics upfront, fewer than half regularly review those benchmarks to assess actual return on investment. Correcting this disconnect could help mitigate challenges with funding which was identified as one of the top barriers to technology adoption. This also presents an opportunity for technology vendors to assist their customers in establishing achievable and meaningful targets and measuring ROI outcomes on an ongoing basis.

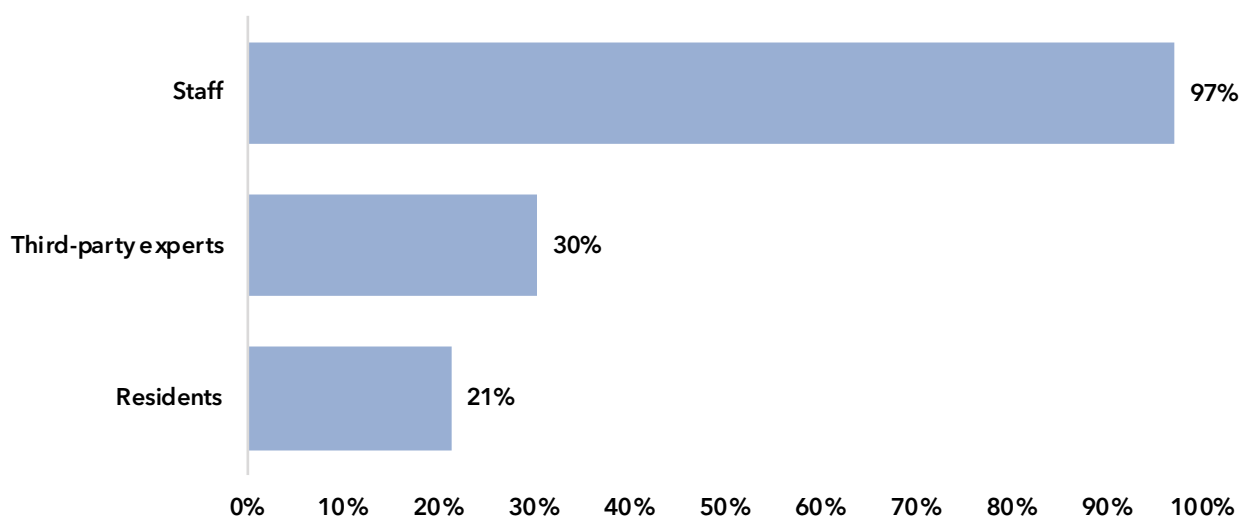
Innovation Councils and Committees

Does Your Organization Have A Centralized Committee Responsible for The Governance of Key Innovation and/or IT Activities?



Only 41% of organizations report having a centralized committee to oversee innovation or IT initiatives.

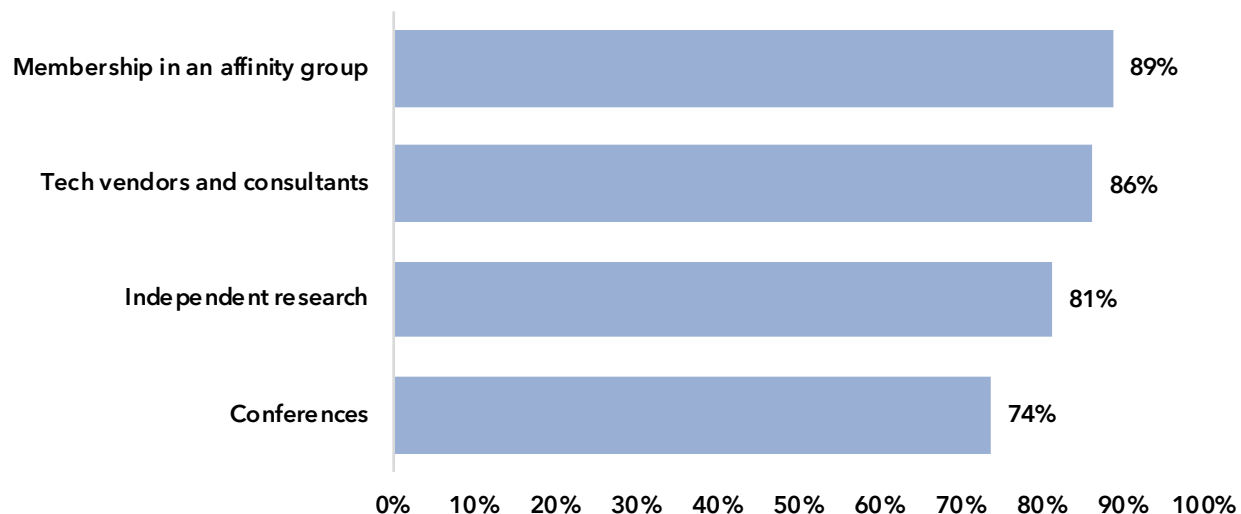
Who is on Your Innovation Councils and Committees?



Among those that do, staff participation is nearly universal, while only a minority of committees include third-party expert and/or resident representatives. This suggests that while internal professional perspectives are prioritized, external viewpoints and resident voices are less commonly integrated into IT planning processes, a potential area for improvement.

Preferred Sources of Technology Information

What Sources Do You Use for Reliable Information about Technology?

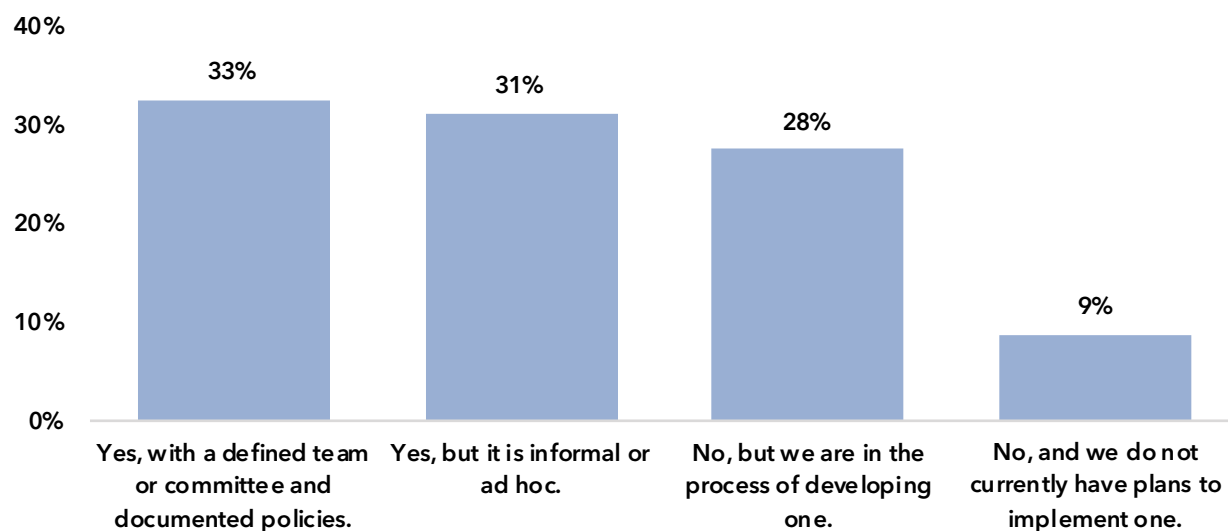


The CTO Hotline findings indicate that senior living and care organizations draw on multiple sources of information to guide their technology decisions, with affinity group membership emerging as the most frequently used resource, cited by 89% of respondents. This is followed closely by tech vendors and consultants, independent research, and conferences.

These findings suggest that while providers value formal channels like conferences and expert advice, they also place a strong emphasis on peer collaboration and shared learning within affinity groups. The high levels of engagement across all four categories indicate a collaborative, multichannel approach to exploring and making decision about technology is common.

Data Governance Programs

Does Your Organization Have A Formal Data Governance Structure or Program in Place?

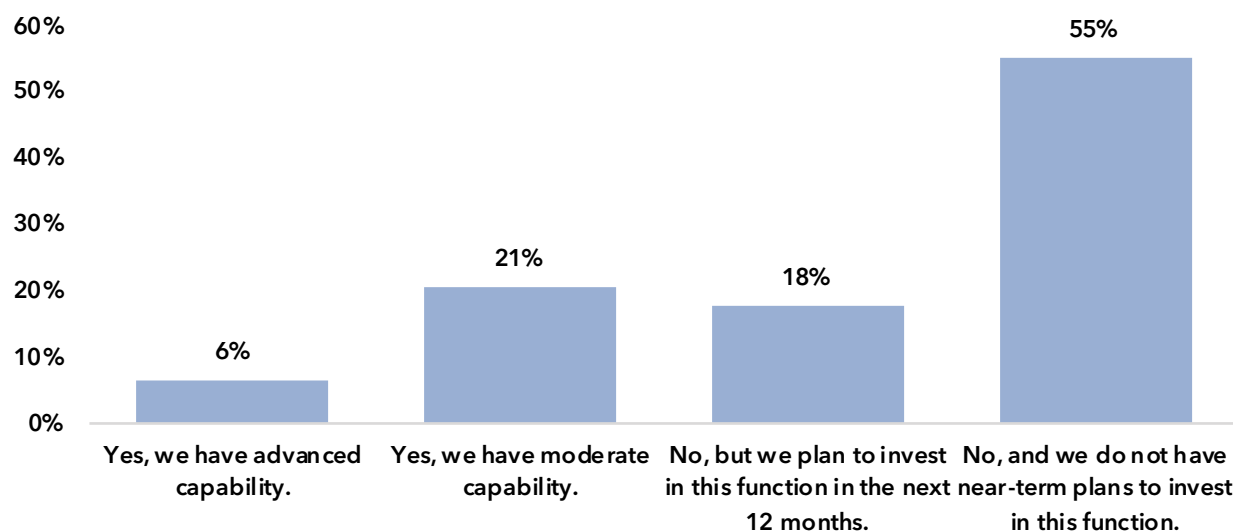


Data governance practices among respondents reflect significant variance in maturity levels. 33% of respondents report having a formal data governance structure in place, complete with a defined team or committee and documented policies. Nearly the same share, 31%, have governance efforts in place but in an informal or ad hoc fashion.

Another 28% are currently developing a governance program, suggesting an upward trend in formalization and awareness of data management practices. However, 9% of organizations have no governance framework and no current plans to create one, highlighting an area of potential risk that these operators may be overlooking. Overall, the data shows that while data governance is a growing focus, many organizations are still in the early or transitional stages of implementation.

Data Science Functions

Does Your Organization Have A Data Science Function?



The CTO Hotline reveals that data science capabilities remain limited across the not-for-profit senior living and care sector, with 73% of respondents reporting no current function. Only 6% of organizations report having advanced data science capabilities, and 21% report moderate capability.

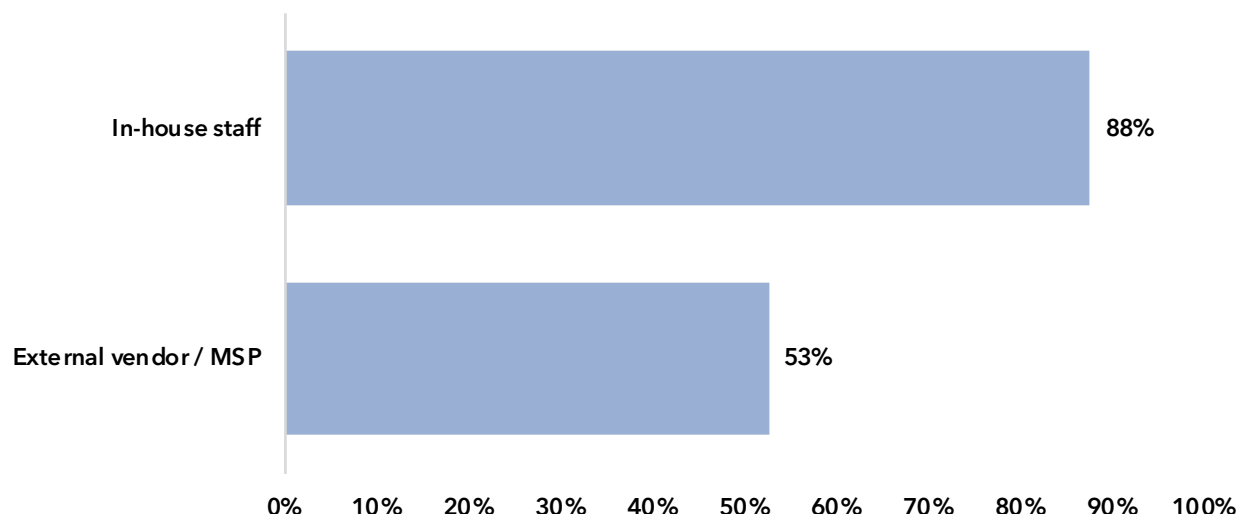
Data Science by Organization Size

	Have Capability?	
	Yes	No
Single-Site	10%	90%
Multi-site: 2 - 3 sites	29%	71%
Multi-site: 4 - 8 sites	55%	45%
Multi-site: 9+ sites	33%	67%

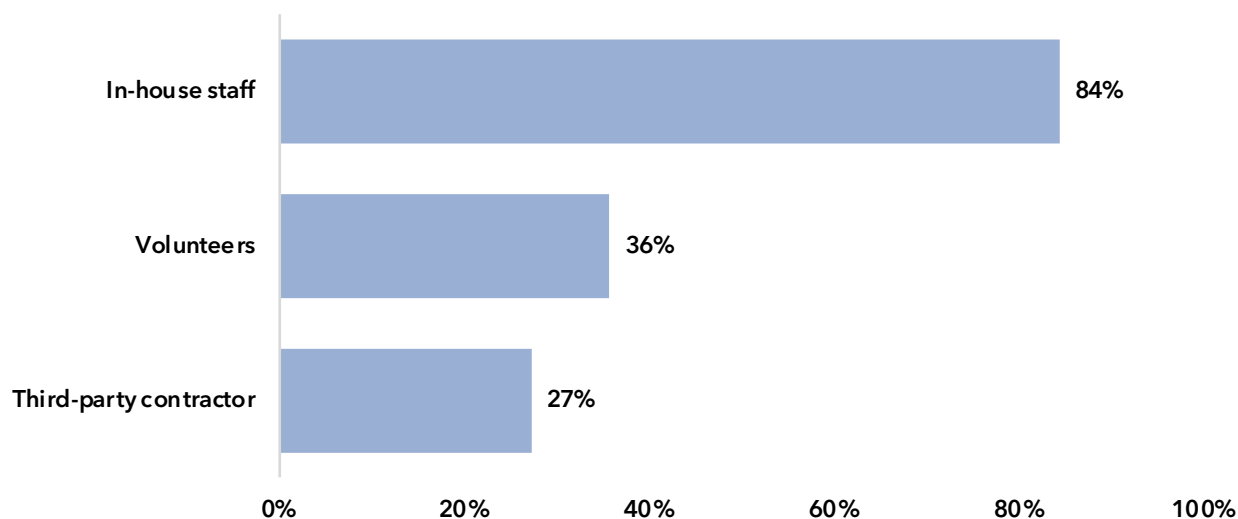
Looking at the data by organization size, multi-site operators with 4-8 locations are the only group more likely to have data science capabilities than not, with 55% reporting having this capability. By contrast, single-site providers are the least likely to have data science functions, at just 10%. These findings point to a meaningful correlation between scale and investment in data science, with smaller providers facing greater resource or prioritization challenges in building out these functions. One oddity in this data is the largest multi-site providers, with 9+ locations, are less likely than smaller multi-sites to have data science functions.

Technology Support for Staff and Residents

How Does Your Organization Provide Technology Support for Staff?

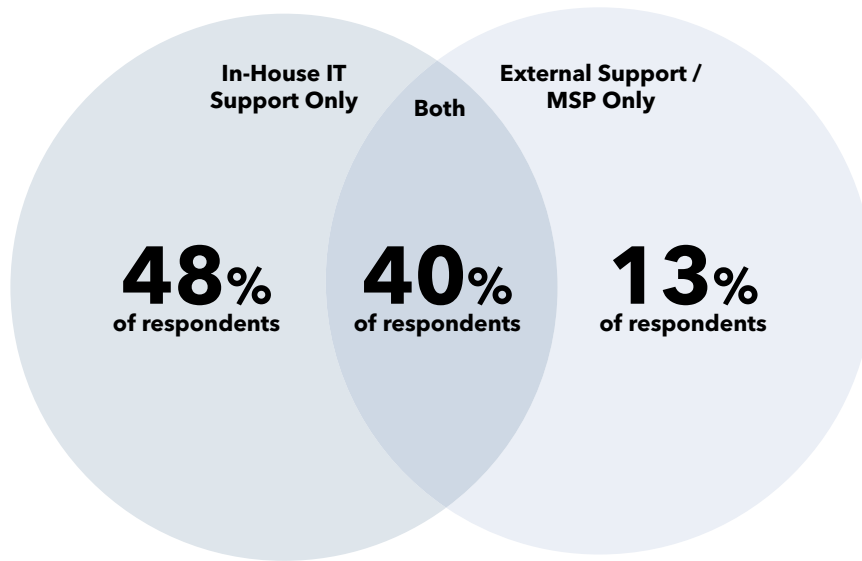


How Does Your Organization Provide Technology Support for Residents?



Senior living and care organizations show a marked preference for delivering tech support through in-house teams, for both staff and residents. Among organizations surveyed, 88% provide IT support for staff through internal teams. Similarly, 84% of organizations that offer tech support to residents do so wholly or partially with in-house staff.

Multiprong Tech Support for Staff



Among those using outside solutions such as MSPs and third-party contractors to deliver support, they usually still use some in-house staff as well: hybrid support models are quite typical.

Changing Consumer Technology Expectations

Key Takeaways

The CTO Hotline survey asked respondents, “How are consumer expectations around technology changing?” and allowed them to type in their responses in free-form. The results were compelling and consistent. We distilled the information into four key insights. Quotes may be lightly edited for clarity.

- 1. Residents now expect significantly better connectivity, specifically, private in-unit WiFi networks capable of supporting 10 or more personal devices, along with reliable public WiFi access throughout the entire campus.**
 - “Secure WiFi per resident is now a requirement; today’s senior couple is bringing 10+ connected devices into their apartment; if you’re not able to support the technology they already have in their own home they’re not interested.”
 - “Residents are increasingly using one or more streaming services and expecting WiFi for that, for computers, tablets, digital frames, and some Alexa devices.”
 - “Expectations are for everything to be connected, and you need the bandwidth to make that happen.”
- 2. Residents have increasingly complex technology needs and therefore expect greater support from the community to set up tech upon move-in, consistently upgrade technology, and manage day-to-day troubleshooting.**
 - “Every day, residents’ expectations evolve and expand, particularly in terms of home-use technologies that are easy to troubleshoot and manage. As we strive to enhance experiences and provide better services, we should consider adding another FTE, or partner with a high school, to handle the requests and expectations of new residents moving into a life plan community.”
 - “The expectation is that technology upgrades and changes won’t impact them. If there is a change, it should be simple enough for them to manage without extra effort.”
- 3. Smart home devices and services are becoming the norm, both in the unit (e.g., streaming services) and outside (e.g., dining room robots).**
 - “I hear that many want to know that we have better tech at our CCRCs than they have at home!”
 - “No one wants to move from a smart home to a dumb home.”

“Residents now expect technology to be embedded in daily life –not added as an afterthought.”
- 4. Residents expect wellness technology to be a core component in their senior living and care experience.**
 - “Residents also have expectations about using connected data to inform health and wellness.”

Other Illustrative Feedback

We include below a series of comments we found particularly interesting in the survey which did not fit into one of the core takeaways listed above.

"Technology is changing from a 'like to have' to a 'must have.' **Technology is another limb.**"

--

"Basic out of the box solutions are no longer sufficient. More integrated, configurable options outside the current senior living sector are preferred. **Senior solutions feel prehistoric and diminishing.**"

--

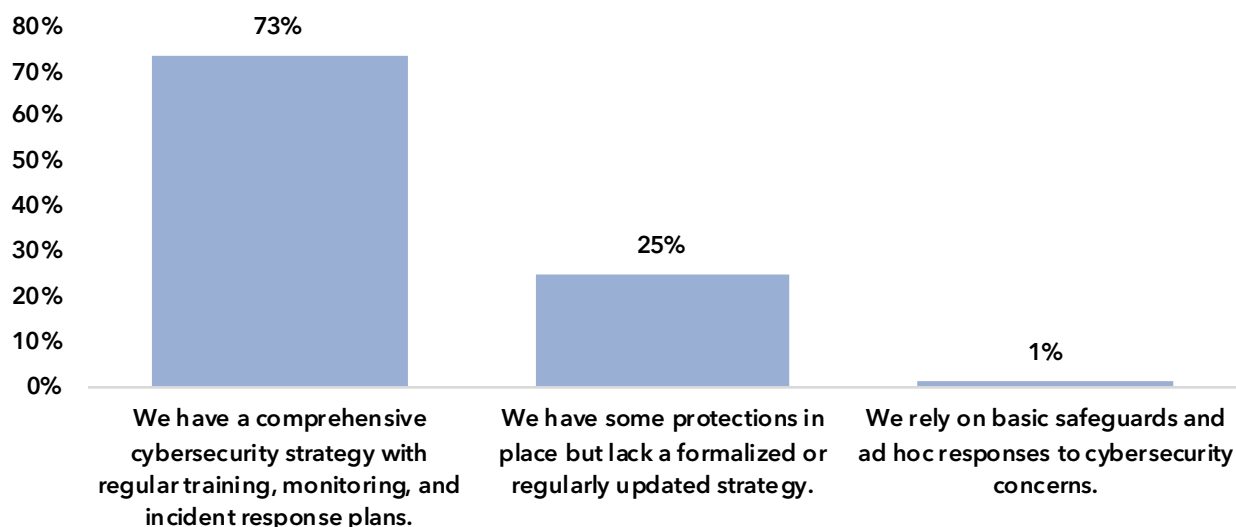
"There is an **expectation of choice** that is hard to provide securely and at scale."

--

"**Expectations are based on offerings provided at prior residences and sites of care** (e.g., local hospitals)."

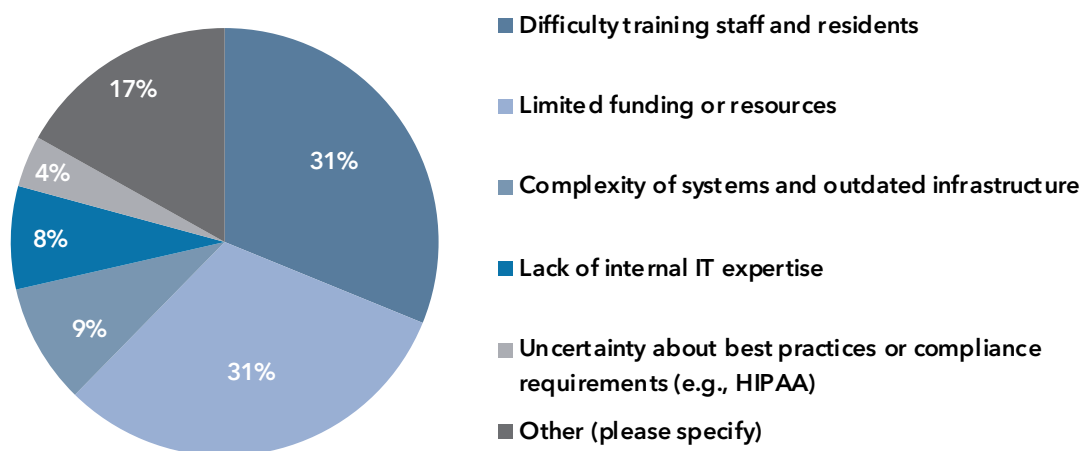
Cybersecurity Preparedness

How Would You Describe Your Organization's Current Cybersecurity Preparedness?



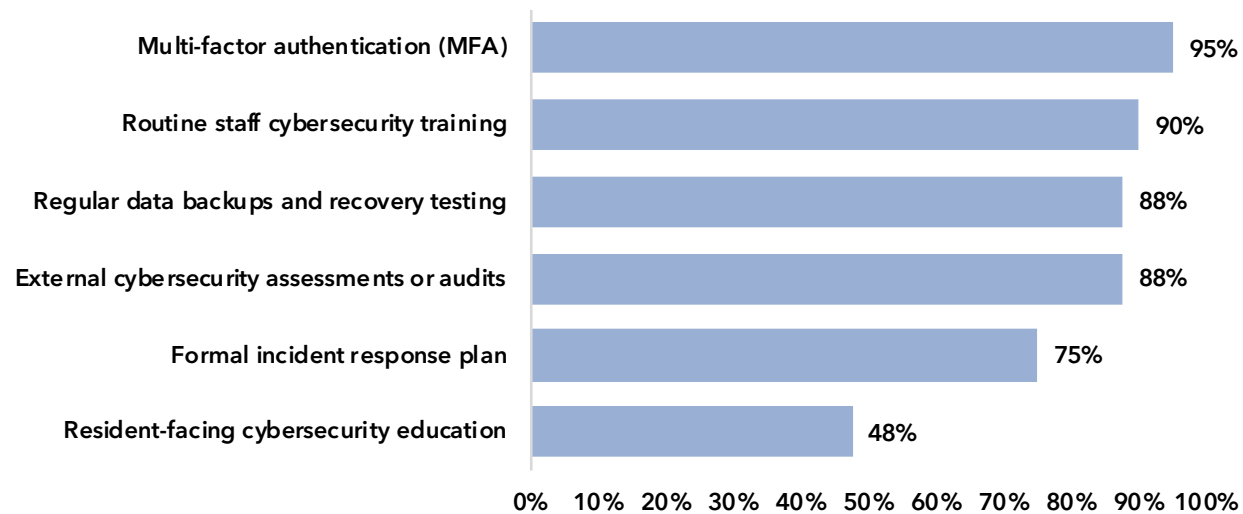
The data indicates that most senior living and care operators feel confident in their current cybersecurity position. 73% of respondents reported having a comprehensive cybersecurity strategy that includes regular training, monitoring, and incident response planning. An additional 25% have some protections in place, although their strategies may not be formalized or routinely updated. Only 1% rely on basic safeguards and ad hoc responses, signaling broad awareness and investment in cybersecurity across the sector.

What is the Greatest Challenge Your Organization Faces in Improving Cybersecurity Protections?



Despite this strong foundation, challenges remain in enhancing protections further. When asked about barriers to cybersecurity improvement, the most commonly cited issues were difficulty training staff and residents and limited funding or resources, each noted by 31% of participants. Other obstacles included complex, outdated infrastructure; a lack of internal IT expertise; and uncertainty around best practices and compliance requirements. Several respondents wrote in additional concerns, particularly related to the difficulty of keeping pace with the rapidly evolving cybersecurity threat landscape.

Which of The Following Cybersecurity Practices has Your Organization Implemented?

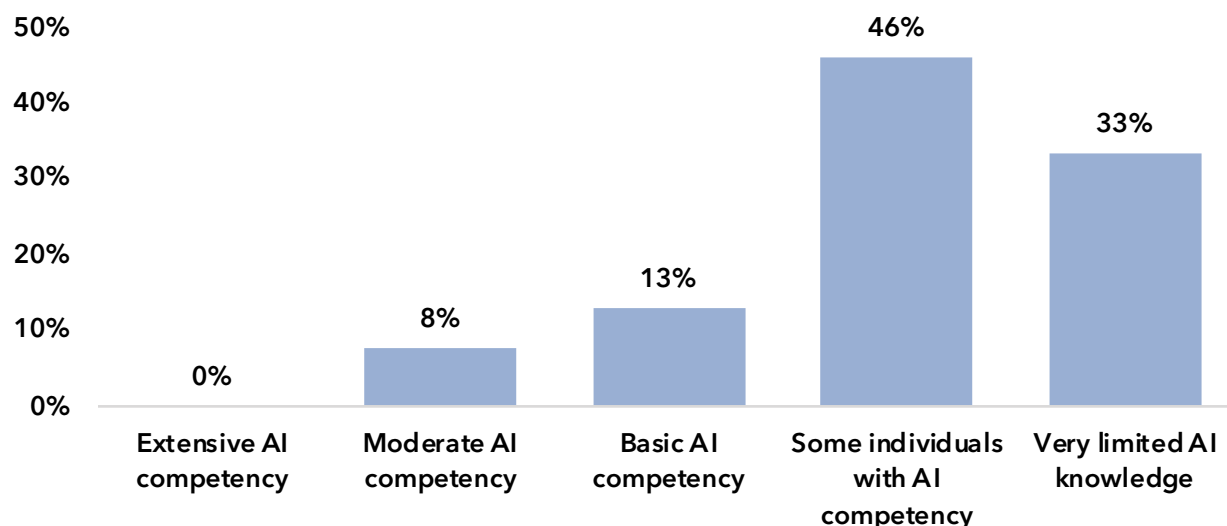


Most organizations have implemented a solid set of cybersecurity practices: the survey identified five practices which at least three-quarters of respondents had adopted. However, one clear gap remains: only 48% of respondents reported offering resident-facing cybersecurity education, suggesting that while defenses for professionals in senior living and care communities are strong, resident preparedness is an area for growth.

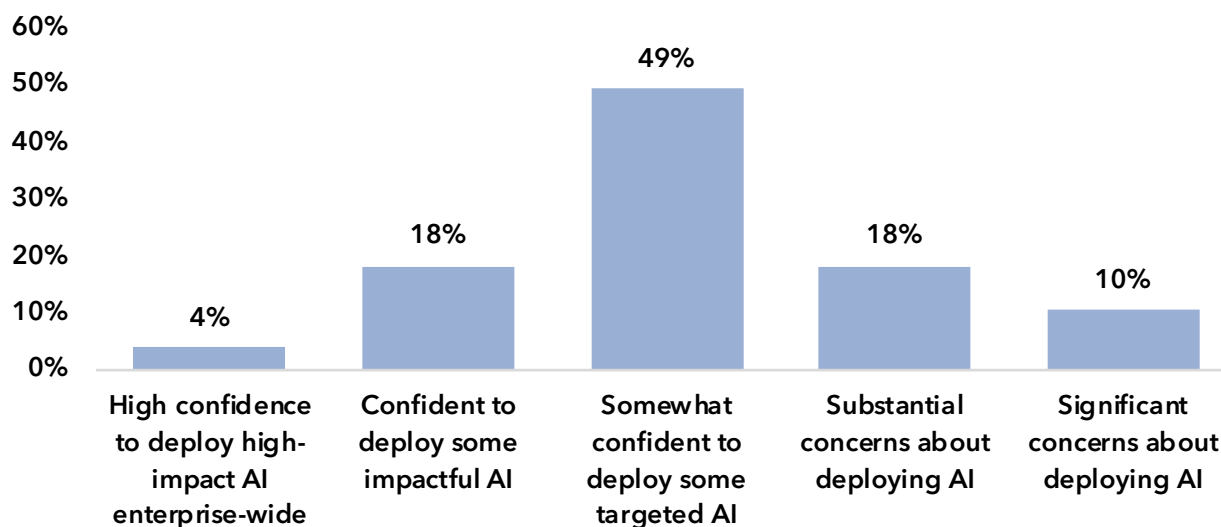
Overall, the findings highlight that the not-for-profit senior living and care sector has made substantial progress in cybersecurity readiness but continues to face resource, training, and scalability challenges, particularly when it comes to supporting residents alongside staff.

Enterprise-Level Adoption of AI

At The Enterprise Level, What Do You Believe is the Level of AI Competency and Understanding?



At The Enterprise Level, What Do You Believe is the Level of Confidence to Meaningfully Deploy AI?



According to survey results, senior living and care organizations are still in the early stages of developing AI capabilities and confidently deploying AI. Nearly 80% of respondents indicated that AI knowledge within their organization is either very limited or exists only within select teams. Notably, no respondents reported having extensive, enterprise-wide AI competency. When asked about their confidence in deploying AI, about half felt only “somewhat confident” in their ability to apply it in targeted use cases, suggesting a cautious but growing interest in adoption.

How Would You Rank Your Chief Concerns around AI from Highest (1) to Lowest (5)?

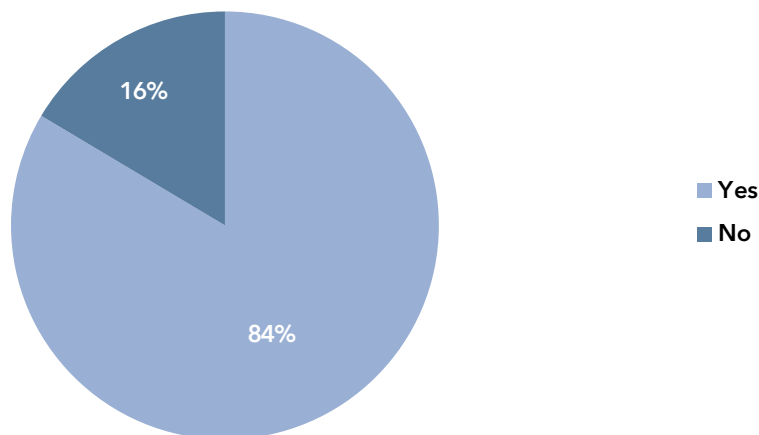
Aggregated Rankings

- #1 Legal/regulatory
- #2 Organization/roles/governance
- #3 Identification, mobilization, and scaling of priority use cases
- #4 Developing/nurturing AI competencies, including internal resources and partnerships
- #5 Stakeholder impact, including potential bias and ethical issues

Legal and regulatory issues emerged as the top concern when considering AI adoption, followed closely by organizational readiness, including clarity around roles and governance. While interest in AI is rising, organizations appear to be balancing their enthusiasm about these emerging technologies with a realistic assessment of their preparedness and risk tolerance.

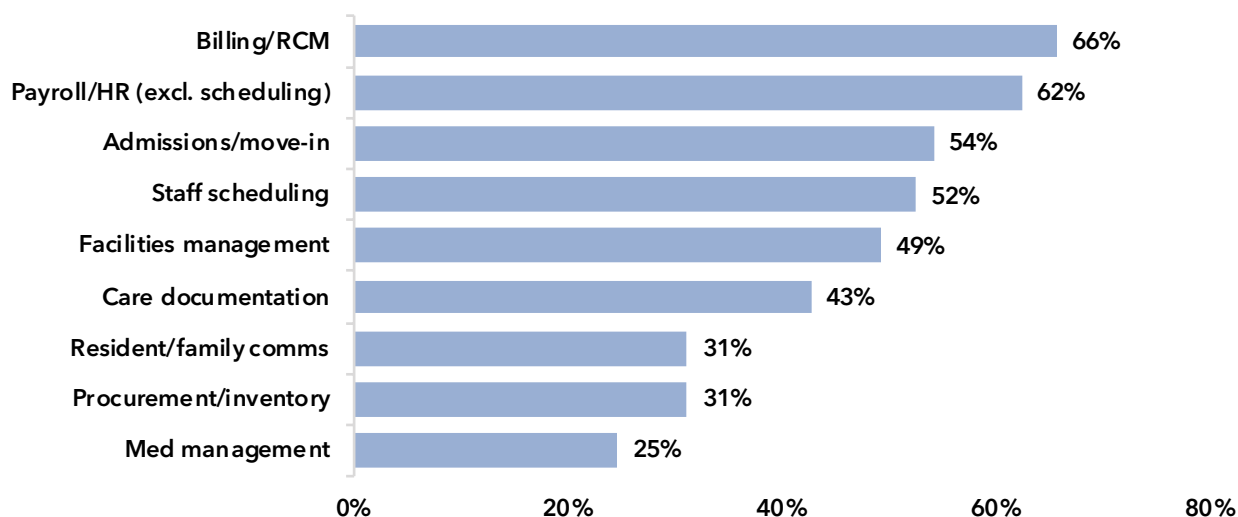
Enterprise-Level Adoption of Automation

Has Your Organization Implemented or Made Plans to Implement Automation?



Over 80% of respondents indicated that they have already implemented or made plans to implement automation, illustrating the rapid rise to prominence of automation technologies in senior living and care and – hopefully – also successful use.

In Which of The Following Operational Areas has Your Organization Implemented or Made Plans to Implement Automation?



Over half of respondents reported implementing automation for billing and revenue cycle management, payroll/HR including scheduling, and admissions or move-in processes. Interestingly, care documentation and medication management were adopted at lower rates (43% and 25%, respectively), which may suggest sustained discomfort with automating clinical processes.

Additional Feedback on Technology Strategies

The CTO Hotline survey asked respondents, “How are consumer expectations around technology changing?” and allowed them to type in their responses in free-form. The results were compelling and consistent. We distilled the information into four key insights. Quotes may be lightly edited for clarity.

- **Top Priorities**

Senior living and care organizations are prioritizing technology governance to align resources and manage costs effectively. Security and modernization remain foundational goals for new IT teams, while efforts to automate, consolidate, and rationalize technology platforms are shaping strategic direction. AI and automation are viewed as promising areas, with some organizations establishing dedicated AI committees. Broader modernization initiatives are geared toward improving resident experiences, increasing workforce productivity, and ensuring sustainability over the long term.

- **Key Challenges**

Concerns about data security, particularly data leaks, are top of mind. Skepticism toward emerging technologies is hindering adoption, while cost constraints and the rapid pace of technological change continue to present obstacles. There is also widespread uncertainty around the long-term viability and adoption of new technologies.

- **What Senior Living and Care Operators Need Now**

Many organizations are still in the research or vendor selection phase, with most showing openness to innovation. There is a growing demand for stronger guidance and leadership from national industry organizations like LeadingAge. Lastly, organizations are increasingly interested in how to track and manage the “tail” of adoption; ensuring that new systems remain effective and sustainable over time.

Other Illustrative Feedback

We include below a series of comments we found particularly interesting in the survey which did not fit into one of the core takeaways listed above.

“Big focus on **technology governance** to better manage priorities and resources that make the best use of our financial resources.”

--

“**Fear of emerging tech** is holding us back.”

--

“Priorities are **automation, rationalization, consolidation**: overall reduction of number of applications being used within the enterprise and adopting best in class strategy versus best of breed.”

--

“We are **bracing for the impending changes for the AI explosion** and currently trying to come to terms with the financial impact of adopting and securing new technologies using our current operational and financial models.”

Appendix

This appendix includes full survey results on technology partners respondents use in a variety of categories. Questions are reprinted here exactly as they appeared in the CTO Hotline survey and all vendors named by respondents are included. We hope this will be useful to readers interested in exploring new technology partner opportunities. Note that responses may not add up to 100% due to rounding errors, the exclusion of respondents who recorded not using partners for particular categories, and the frequent occurrence of respondents using more than one partner in any given category.

Who is your electronic medical/health record (EMR/EHR) partner? (Select all that apply.)

Company	% Respondents
PointClickCare	61%
MatrixCare	34%
Netsmart	14%
WellSky	6%
Homecare Homebase	2%
American Data	1%
Collabrios	1%
eClinicalWorks	1%
HHAeXchange	1%
KanTime	1%
Net Health	1%
NextGen	1%
PACE Care Online	1%
Residex	1%
Salesforce	1%
Yardi	1%

Who is your automatic fall detection technology partner?
(Select all that apply.)

Company	% Respondents
VirtuSense	9%
Safely You	4%
AUGI	1%
CarePredict	1%
Helpany	1%
KamiCare	1%
Lifeline Medical Alert	1%
Nobi	1%
RCare	1%
Status Solutions	1%
Vayyar	1%

Who is your passive monitoring technology partner?
(Select all that apply.)

Company	% Respondents
Safely You	4%
Amba Health	2%
CarePredict	2%
K4Connect	2%
FitRight CONNECT	1%
JNL QUANTUM	1%
Lifeline Medical Alert	1%
RCare	1%
SARA (Status Solutions)	1%
Silversphere (Sentricks)	1%

Who is your partner for post-acute referral management technology?
(Select all that apply.)

Company	% Respondents
ExaCare	4%
Sentra	4%
Careport (WellSky)	3%
Cascala	3%
Netsmart	1%
pac-IQ	1%
Rosa (Qatalyst Health)	1%
SMARTMD	1%

Who is your technology partner to support HCBS (homecare) software?
(Select all that apply.)

Company	% Respondents
MatrixCare	28%
WellSky	16%
Aanii	7%
HHAEExchange	7%
AlayaCare	5%
Homecare Homebase	5%
Netsmart	5%
AxisCare	3%
Collabrios	3%
eRSP	3%
PointClickCare	3%
Thornberry	3%
AASC Online	2%
Alora Plus	2%
Axxess	2%
Generations	2%
Careficient	2%
Kantime	2%
NetHealth	2%
Yardi	2%

Who is your staff scheduling software partner?
(Select all that apply.)

Company	% Respondents
OnShift	39%
UKG (fka Kronos)	31%
Paycom	11%
ADP	8%
Smartlinx	5%
Dayforce	3%
Paylocity	3%
AOD	1%
eRSP	1%
EZShift	1%
Homecare Homebase	1%
MakeShift	1%
PayNW	1%
SchedulePop	1%
Valid Shifts	1%
7shifts	1%

Who is your general ledger software partner?
(Select all that apply.)

Company	% Respondents
Sage	28%
MatrixCare	26%
Microsoft	25%
Oracle NetSuite	8%
Workday	5%
PointClickCare	3%
Yardi	3%
AccuFund	1%
Acumatica	1%
Infor	1%
MIP	1%

Who is your customer relationship management (CRM) software partner?
(Select all that apply.)

Company	% Respondents
Aline	36%
WelcomeHome	21%
Salesforce	14%
MatrixCare	5%
PointClickCare	5%
Advantage Anywhere	4%
Yardi	3%
Carefeed	1%
Continuum CRM	1%
Rocketfuel	1%
SMARTMD	1%

Who is your social connectedness and engagement technology partner?
(Select all that apply.)

Company	% Respondents
Uniguest	32%
LifeLoop	18%
Go Icon	17%
Cubigo	9%
Sentrics	5%
Wellzesta	3%
K4Connect	3%
Alosant	1%
Carefeed	1%
Exolet	1%
ResHub	1%
Salesforce	1%
Sentek	1%
Serenity Connect	1%
SmartBug	1%
Speak2	1%
Spectrio	1%
TSOLife	1%

**Who is your digital dining service software partner?
(Select all that apply.)**

Company	% Respondents
FullCount	42%
MealSuite	22%
MealTracker	9%
Volanté Systems	9%
VisualTouch	8%
Cubigo	4%
Cardwatch	3%
Dietech	3%
eMenuCHOICE	3%
Agilysys	1%
CBS NorthStar	1%
HPSI	1%
Nutrition Mgmt Program	1%

**Who is your data analytics software partner?
(Select all that apply.)**

Company	% Respondents
Power BI (Microsoft)	50%
Net Health	4%
Domo	3%
Qlik	3%
Tableau	3%
Workday	3%
Avalon Health	1%
AWS QuickSight	1%
Prophix	1%
Sage	1%
ThriveWell Tech	1%
Yardi	1%

Who is your large language model (LLM) partner?
(Select all that apply.)

Company	% Respondents
Microsoft Copilot	63%
ChatGPT	36%
Google Gemini	3%
Azure OpenAI	1%
Claude	1%

Who is your cybersecurity testing solution partner?
(Select all that apply.)

Company	% Respondents
KnowBe4	55%
BlueOrange Compliance	36%
Relias	32%
Mimecast	12%
CLA	3%
Parasol Alliance	3%
Sentinel	3%
Adaptive	1%
Arctic Wolf	1%
Integrity Tech Solutions	1%
iSECURE	1%
Katalyst	1%
Meriplex	1%
OutThink	1%
Phin Security	1%
Pondurance	1%
ProCircular	1%
Proofpoint	1%
Rapid7	1%
SilverSky	1%
Sophos	1%

Who is your fleet-managed smart home device (devices managed by community rather than "BYOD") partner?
(Select all that apply.)

Company	% Respondents
Amazon Alexa	24%
ecobee	1%
Serenity Smart Homes	1%

Which cloud providers or platforms do you currently rely on?
(Select all that apply.)

Company	% Respondents
Microsoft Azure	75%
MSP	28%
AWS	18%
Google Cloud	4%