Ziegler Link•age Funds | LeadingAge CAST

CTO Hotline

JULY 2026

Ziegler Link·age Funds

LeadingAge® CAST
center for aging services technologies

About Ziegler Link•age Funds

Ziegler Link•age Funds invests in innovative technology and services companies improving the lives of older adults and those who love and care for them – connecting capital, expertise, and a community of senior living, healthcare providers, and payors to transform aging. The Funds offer a combination of financial expertise and deep aging sector specialization that no other fund can replicate.

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
Research Associate
Ziegler Senior Housing & Care Finance
mcunningham@ziegler.com

Throughout this report, respondents' quotes have occasionally been edited for length and/or clarity.

Table of Contents

A Note from Ziegler Link•age Funds

Ziegler Link•age Funds is pleased to once again partner with LeadingAge CAST to bring you our second annual CTO Hotline report!

With our first fund raised in 2012, the Ziegler Link•age Funds were the first dedicated venture capital platform investing in the future of aging. Built on a partnership between two organizations, Ziegler and Link•age, each with deep roots in aging, senior living, and care, we have long supported innovation among not-for-profit life plan communities who represent the core of our strategic investor base. Our investment strategy creates distinct value for the three groups at the heart of our ecosystem: Investors, Founders, and Co-investors. Each pillar reinforces the others to drive financial returns, strategic insights, and lasting impact, and this report is a perfect example of that strategy in action.

Senior living and care providers, the growing companies we invest in, and our co-investors are always interested in learning more about technology adoption in this market: Who makes the decisions on what technologies to adopt? Are providers focused on a quantifiable ROI or predominantly feedback from staff and residents? Do providers have the bench strength to self-integrate solutions and standardize and analyze data, or do vendors need to take the lead? While this year's data highlights advances in innovation in a number of categories, the data also underscores areas where there remains room to improve.

We hope this report provides our strategic investor base with insight into the technology tools being adopted and the areas we can improve in our execution strategies, founders with a view into the decision-making process life plan communities adopt as they plan their go-to-market strategies, and our fellow venture investor community a lens into the opportunities for innovation and growth among these providers.

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

Katie Schmitz
Managing Partner
Ziegler Link•age Funds

A Note from LeadingAge CAST

At LeadingAge CAST, we are pleased to continue our partnership with Ziegler Link•age Funds on the CTO Hotline report.

What began as a first-of-its-kind benchmark has quickly become an important year-over-year resource for understanding how not-for-profit senior living and care organizations are approaching technology strategy, adoption, governance, and innovation.

This year's findings reinforce what we continue to hear across the field: technology is becoming central to the future of aging services. It is increasingly tied to executive leadership, workforce capacity, resident and family expectations, cybersecurity, data governance, AI, automation, and long-term operational sustainability. At the same time, the purpose of technology must remain clear. The goal is not simply to adopt more tools, but to use technology in ways that strengthen organizations and improve the lives of older adults and the people who support them.

A helpful lens for this year's report is that technology should be focused on the back of the house and human-centered at the front of the house. The greatest value comes when technology reduces administrative burden, improves decision-making, supports staff, and creates more time and capacity for meaningful human connection with residents, clients, and families.

We hope this report helps providers, technology partners, investors, and other stakeholders better understand where the field is making progress, where challenges remain, and where thoughtful collaboration can help technology fulfill its promise in aging services.

With appreciation,

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

Executive Summary

This spring, Ziegler Link•age Funds and LeadingAge CAST conducted the second annual *CTO Hotline* survey. The survey uncovers how not-for-profit senior living and care providers are approaching the swiftly evolving technology landscape, including how they prioritize new technology initiatives, resolve challenges, and assess efficacy. In this report, we aim to summarize this data in a way that helps readers better understand not only the prevailing trends in this industry, but also how their organizations can continue to progress on their digital journeys.

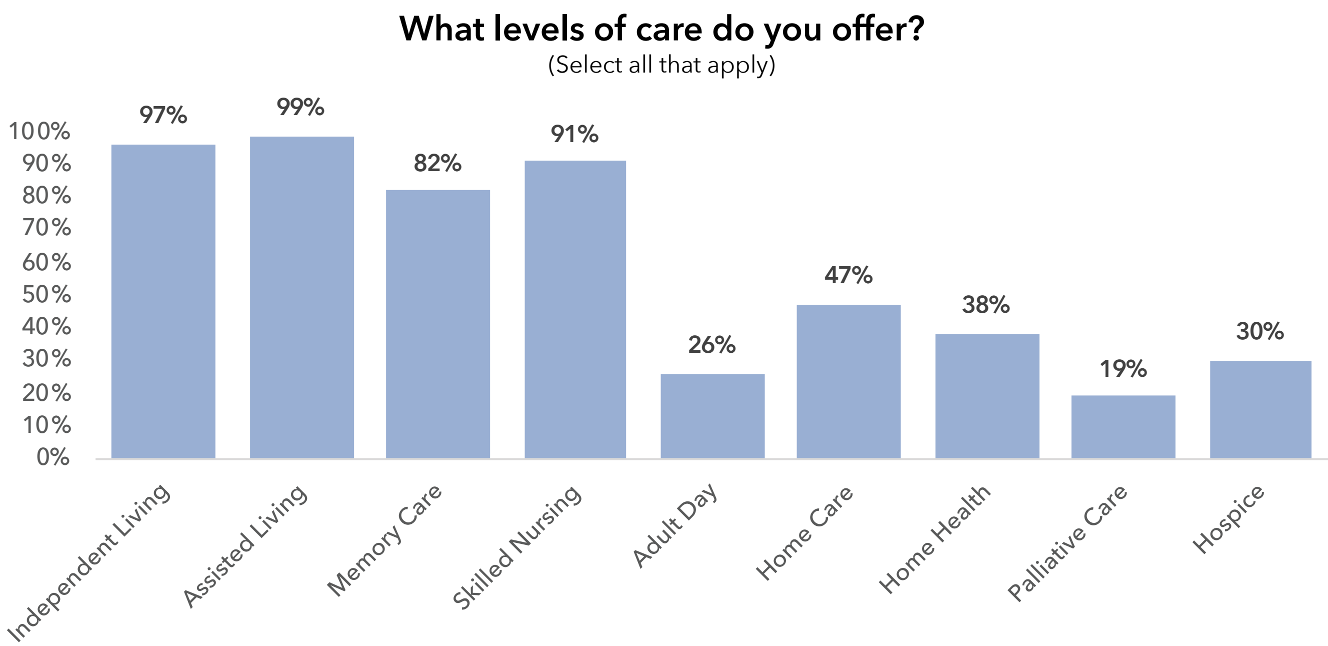
Readers of this report will notice several recurring themes:

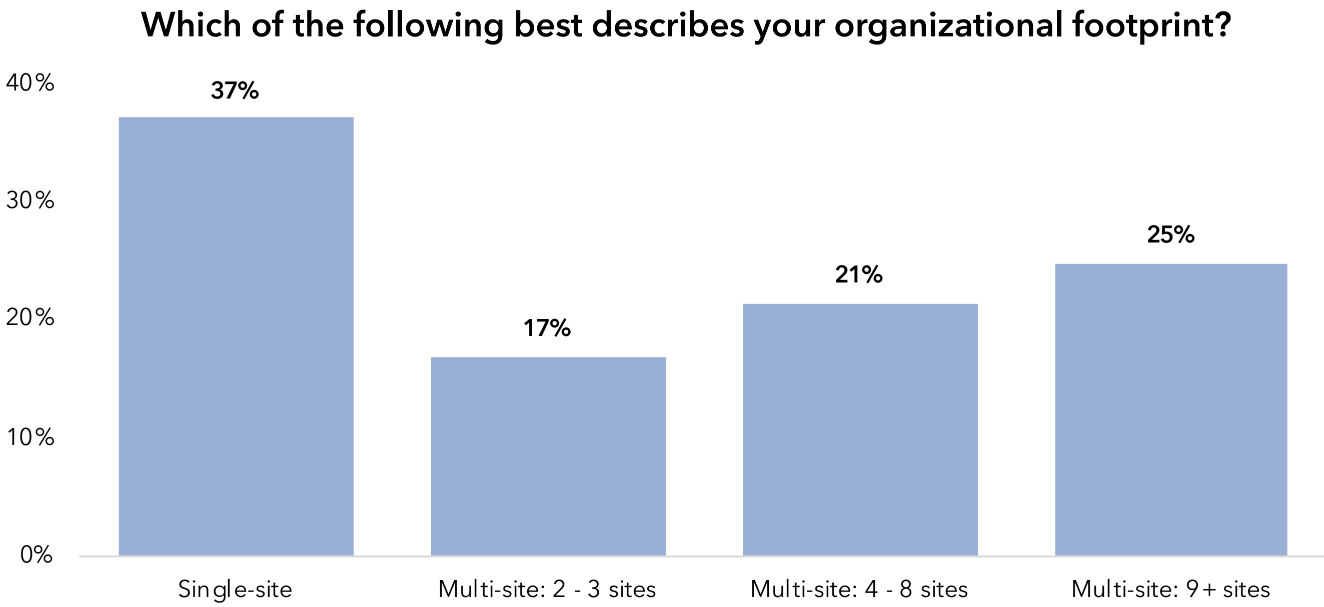
- **Providers want technology to optimize back-of-house operations, leaving more time and energy available for human staff to deliver a highly personal resident experience.** As Jon Fletcher, CEO of Presbyterian Homes & Services, eloquently explained his vision: "Technology-focused back of the house. Human-centered front of the house."
- **Change is exciting, but not always easy.** Providers firmly believe technology will continue to change their organizations for the better. They also believe that as technology impacts ever-larger portions of their businesses, they will need to spend more time and money on tech-related decision-making, training, and maintenance.
- **Technology governance to support more intentional decision-making is becoming the norm.** To avoid what one survey respondent called "random acts of technology," providers are increasingly creating formal innovation or technology committees that help align technology decisions with their strategic IT plans.
- **Residents and staff are expecting a higher-tech environment in which to live and work.** In particular, increased reliance on mobile solutions for everything from personal banking to clinical charting has led to a nearly uniform expectation that senior living providers will have strong, consistent Wi-Fi everywhere on their campuses.
- **AI competence and confidence are drastically improving, with adoption of new AI tech rising in tandem.** Although no one is willing to claim they have extensive AI competence enterprise-wide just yet, it is becoming increasingly common to have individuals or teams with strong AI skills scattered across an organization. Providers are also becoming more confident in their teams' abilities to deploy AI in meaningful ways given enough time and are making investments in AI-forward technology accordingly.
- **Cybersecurity remains a top priority.** Fortunately, most providers have made the investment of time and money needed to feel they are staying ahead of cyberthreats – for the moment. AI-powered cyberattacks that target human limitations rather than software gaps are rapidly advancing, forcing providers to stay vigilant.
- **Integrations are key.** To avoid disjointed data, redundant work processes, and costly errors, providers are making meaningful efforts to reduce data silos and tech fragmentation across their organizations. Over the last few years, providers feel they have come a long way toward centralizing their technology and data, and they are now focused on working with partners that support this goal by enabling easy integration.
- **Measuring the effectiveness of new tech remains a challenge.** As was the case last year, most providers are not measuring whether new technology is delivering an ROI. We urge leaders to look at measuring technology success as an opportunity not only to evaluate whether certain solutions are working as intended and to replace underperforming tools, but also to set an example of data-driven leadership that can impact the culture of decision-making across an organization.

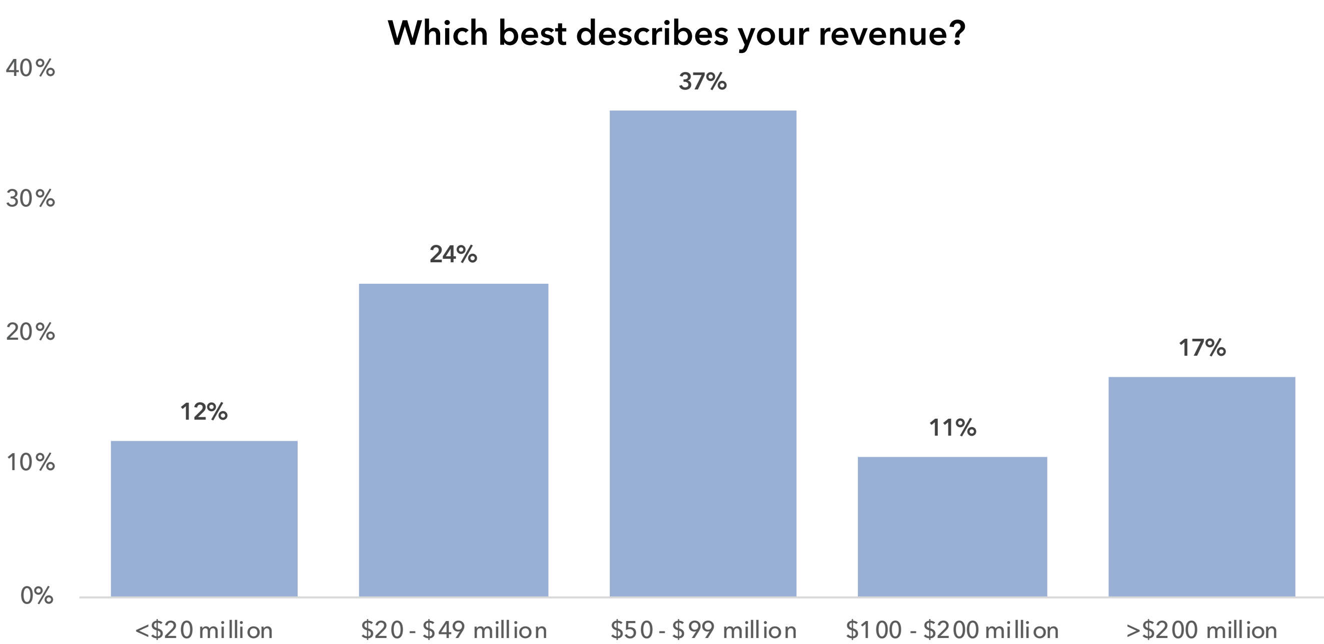
Section 1
Organizational Dynamics

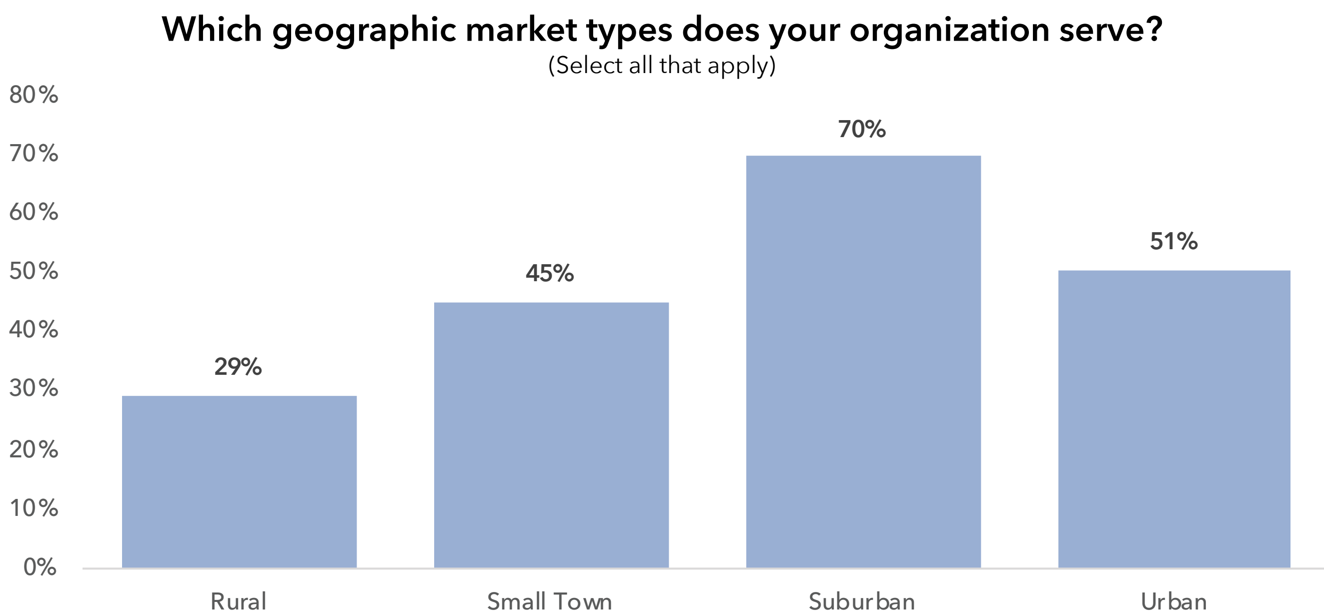
1.01 General Respondent Info

The data in this year's *CTO Hotline* is derived from representatives of diverse not-for-profit senior living and care organizations. Over a hundred professionals responded to the survey, offering a broad perspective on current industry needs, decision-making processes, and trends. An overview of these providers can be found below.

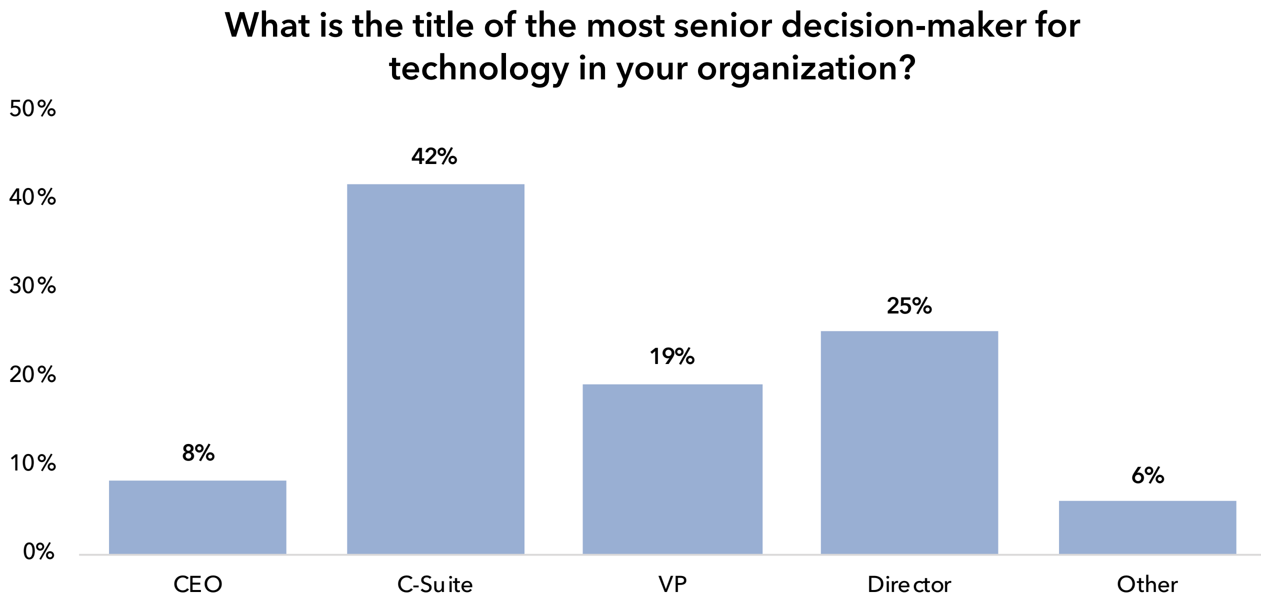



Which of the following best describes your organizational footprint?
40%
30%
20%
10%
0%
37%
17%
21%
25%
Single-site
Multi-site: 2 - 3 sites
Multi-site: 4 - 8 sites
Multi-site: 9+ sites

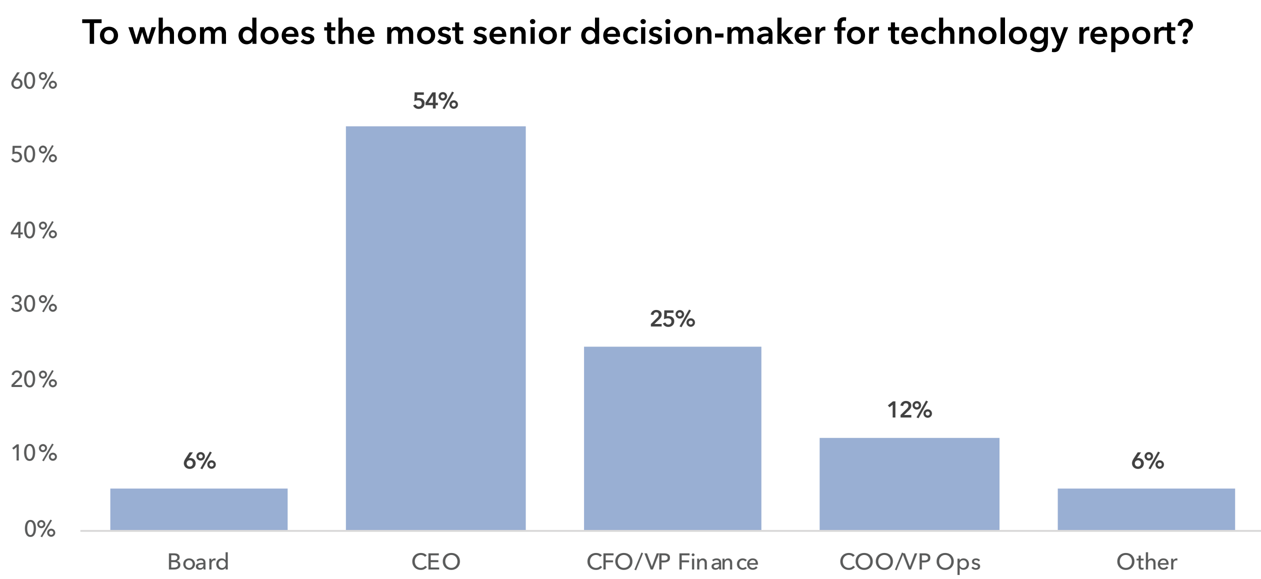

Which best describes your revenue?
40%
30%
20%
10%
0%
12%
24%
37%
11%
17%
<$20 million
$20 - $49 million
$50 - $99 million
$100 - $200 million
>$200 million


Which geographic market types does your organization serve?
(Select all that apply)
80%
70%
60%
50%
40%
30%
20%
10%
0%
29%
45%
70%
51%
Rural
Small Town
Suburban
Urban

1.02 Technology Leadership



As was the case in 2025, slightly over half of responding organizations reported that their most senior technology decision-maker was a member of the C-suite; 8% of respondents indicated this responsibility lay directly with the CEO. As technology becomes more integral to organizational strategy, the role appears to be evolving beyond an additional responsibility for CEOs and toward a dedicated executive leadership function.



Also similar to last year, over half of senior technology decision-makers report to their CEO, with CFO/VP of Finance as the next most common reporting structure, followed by the COO/VP of Operations. Careful readers of this chart will notice it does not exactly add up to 100% – this reflects that some organizations have a dual reporting structure, most commonly one in which the head of technology reports to both the CEO and the CFO.

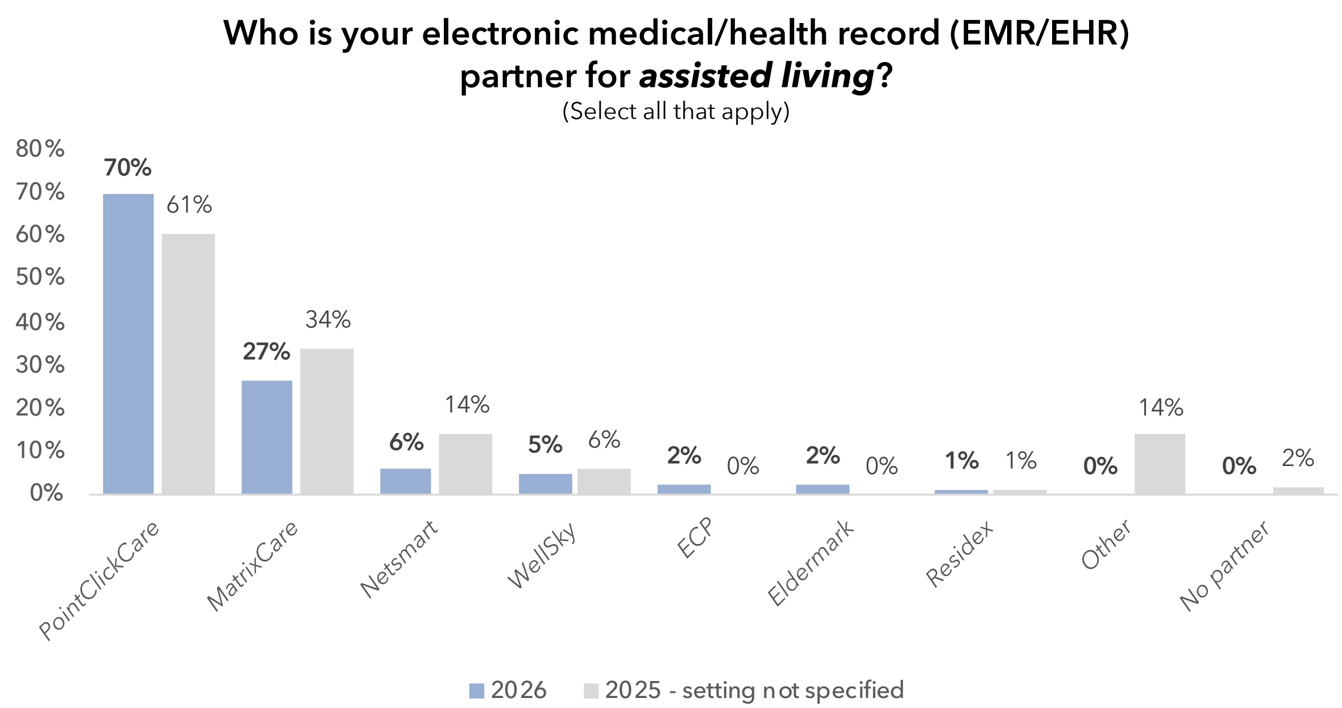
For organizations with between one and eight sites, it is typical to have somewhere between four and six total tech FTEs. Organizations with nine or more sites tend to have substantially larger tech teams, often with headcounts in the mid-teens.

Section 2
Technology Adoption

2.01 Electronic Medical/Health Records (EMR/EHR)

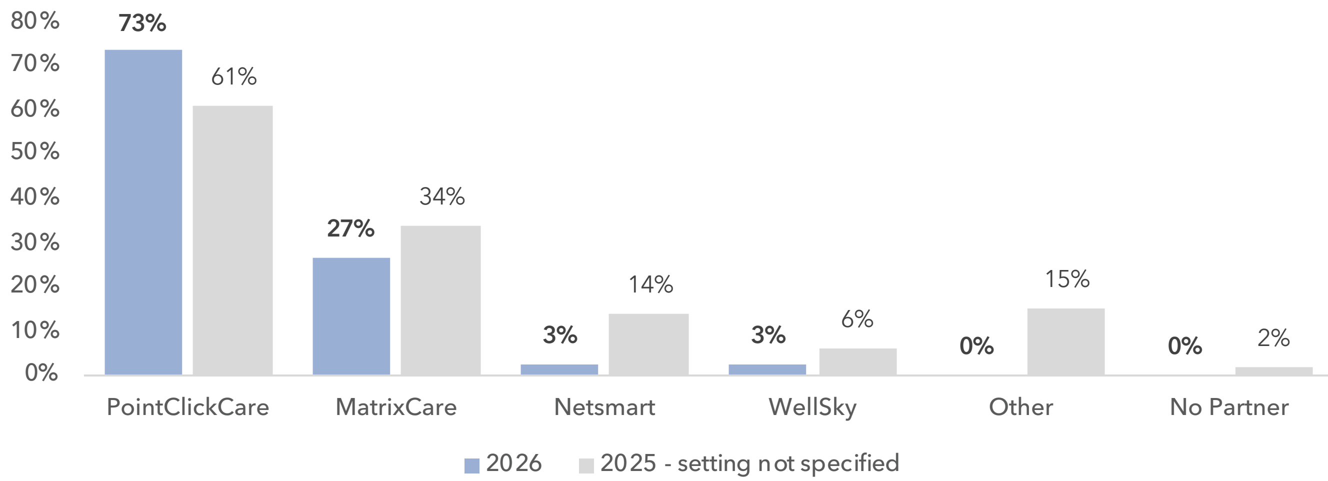
In 2025, we polled respondents on the EHR vendors used in their organizations without delineating between levels of care. As we see an increasing number of vendors offering dedicated assisted living EHRs, we decided this year to ask two separate questions: "Who is your EHR partner for ***Assisted Living***?" and "Who is your EHR partner for ***Skilled Nursing***?"

While our goal was to offer greater precision this year, the final data for assisted living and skilled nursing were quite similar:



Who is your electronic medical/health record (EMR/EHR) partner for ***skilled nursing***?

(Select all that apply)

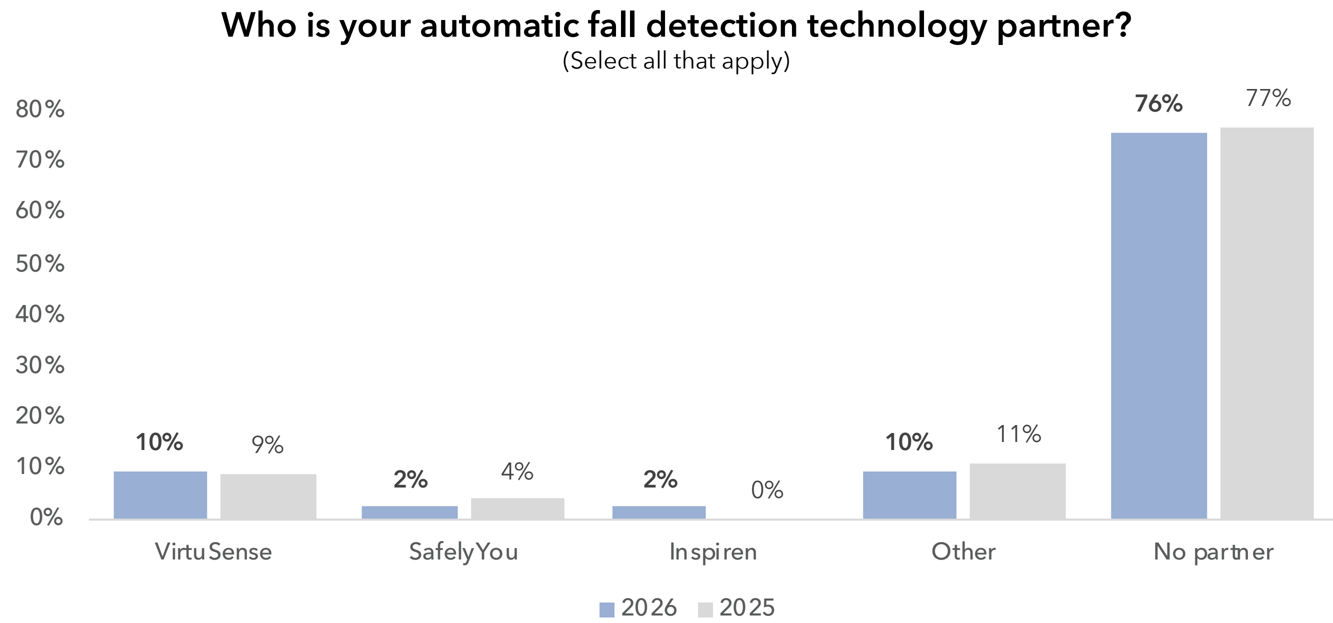


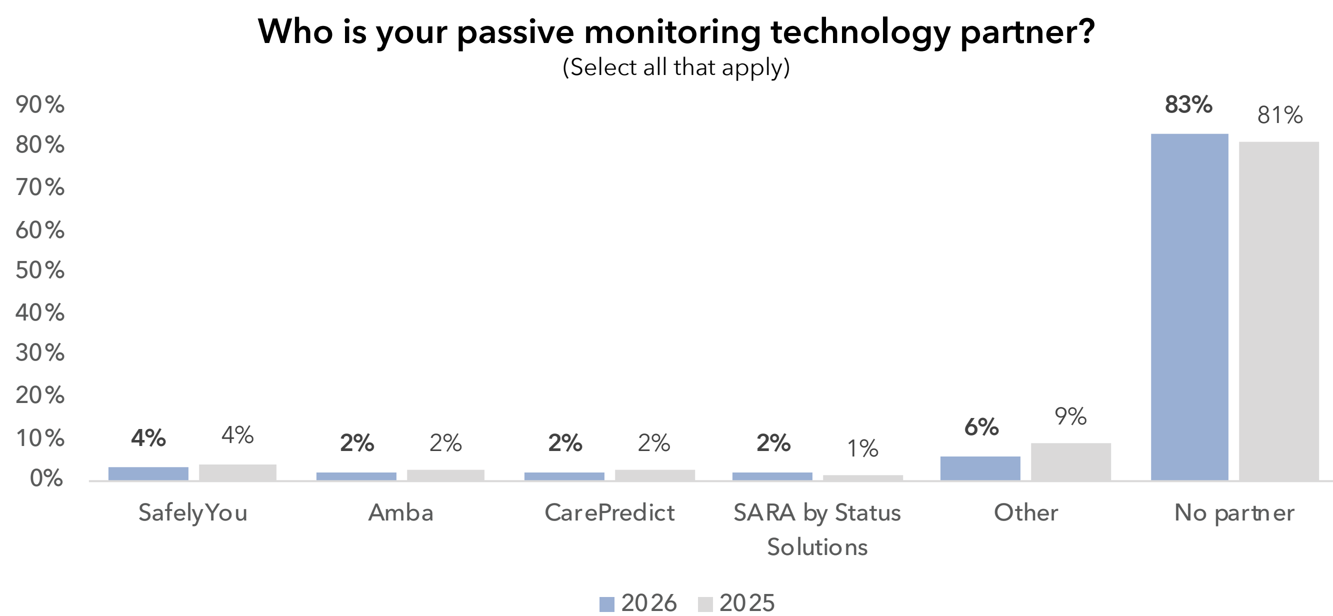
The propensity of not-for-profit life plan communities to use the same EHR for assisted living and skilled nursing likely reflects a desire for simplicity. Whereas a standalone for-profit assisted living community or skilled nursing community might have a setting-specific EHR, life plan communities are finding ways to make EHRs optimized for skilled nursing work even in the lower-acuity assisted living setting.

In each setting, nearly three-quarters of the market is controlled by PointClickCare, with MatrixCare coming in second place with 27% market share. WellSky and Netsmart each claim small portions of the market, with a few other small vendors appearing in the assisted living setting. For more information on PointClickCare's popularity, see **2.12 Standout Partners**.

The most noteworthy change between the EHR data in the 2025 *CTO Hotline* and this year's data is the rise in PointClickCare's popularity. This comes at the expense of numerous competitors, most notably MatrixCare.

2.02 Automated Fall Detection & Passive Monitoring Technology





Conference-goers, webinar-attenders, and email-readers in our industry this year would be hard pressed to ignore the proliferation of automated fall detection and passive monitoring technologies. And yet, only a very small number of providers in our survey report adopting any of these solutions, and among those without a current partner, most do not plan to seek one within the next 12 months. VirtuSense has a notable presence in the fall detection (and prevention) space, but the market is otherwise highly fragmented, with overall low penetration.

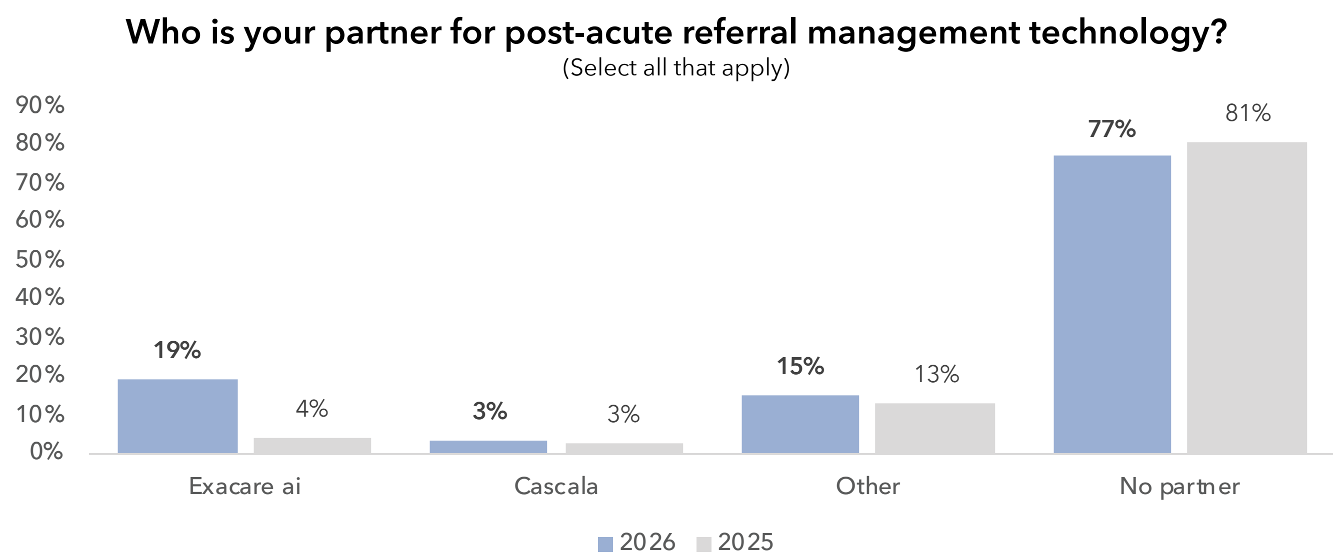
Given the marketing presence of fall detection and passive monitoring companies, these vendors are becoming increasingly common fixtures on conference sponsor lists and in our inboxes. It is likely that their strongest adoption is in the for-profit skilled nursing market, outside of the scope of this survey. Among our core survey respondent demographic — not-for-profit life plan communities — low adoption is the rule, as was true in 2025. Further research is needed to gain a fuller understanding of this low uptake, but providers have shared the following reasons with us for so far deprioritizing these technologies:

- Installation can be expensive and time-consuming
- Poor Wi-Fi severely limits the value of these solutions
- Staff and family members may prefer not to have in-room cameras, which is one component of many fall detection and passive monitoring systems
- Concerns about violating evolving state regulations related to monitoring
- Low realized ROI in communities where falls are already uncommon

2.03 Post-Acute Referral Management Software

Advances in large language models and other artificial intelligence tools have started to impact many functions in life plan communities, and there will be more information on that later in this report (for examples, see **2.10 Large Language Models (LLMs)** and the entirety of **Section 3: Artificial Intelligence and Automation**). One of the most notable new capabilities these tools have enabled is more efficient, high-quality management of post-acute care referrals.

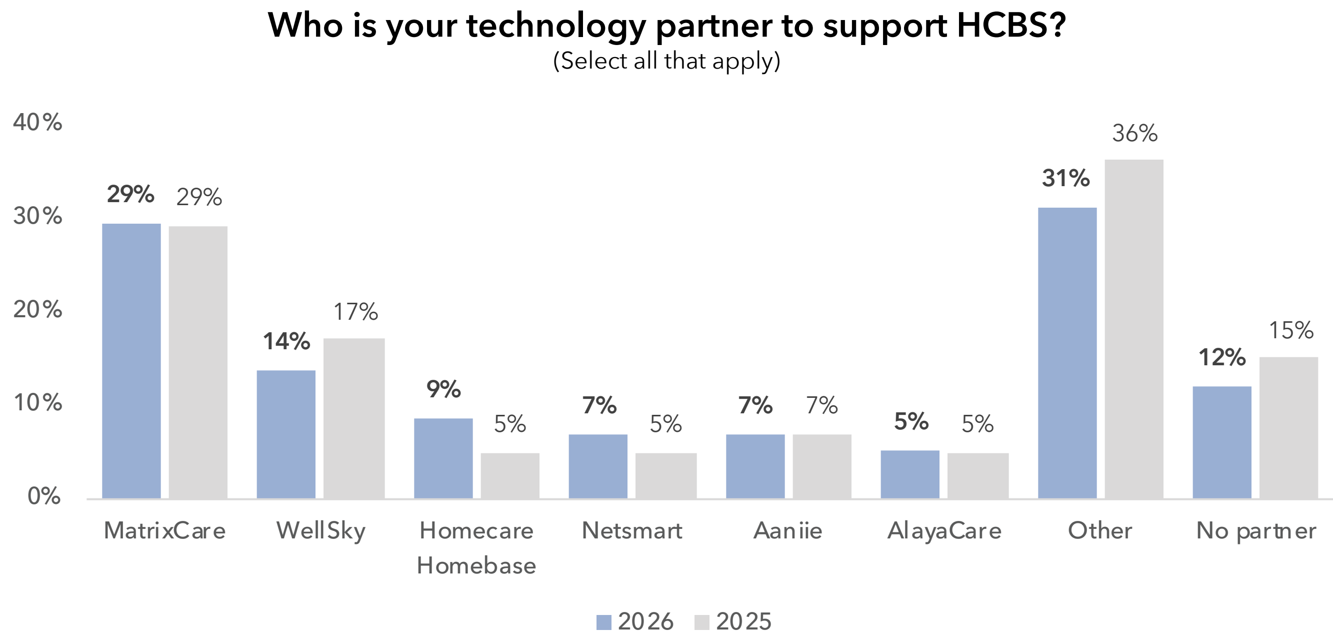
An increasing share of post-hospital discharges to skilled nursing are routed to specialized, for-profit SNF communities. However, a significant portion of not-for-profit life plan communities still accept post-acute care referrals for non-residents. Sorting through referral data from health system partners, determining which patients a SNF can safely and profitably support, and quickly replying to the referring entity requires onerous, time-consuming work that takes nurses away from serving patients. Post-acute referral management solutions make this process easier and more efficient by using AI to instantaneously digest a referred patient's data and match it against the capabilities, payer contracts, and capacity of the SNF, providing nurses with a short, clear summary of whether or not to accept a new patient referral.



The uptake of these solutions in the not-for-profit senior living sector is presently low, as seen in the chart above. Exacare.ai has the largest market share at 19%, representing the lion's share of new adoption since last year. Cascala is the next largest at 3%. Numerous other smaller technology solutions were mentioned, in addition to almost all the major SNF EHR companies as they develop referral management capabilities. However, three-quarters of the surveyed market still does not use post-acute referral management software.

Despite the relatively low adoption of referral management technology among the not-for-profit life plan communities surveyed for this report, industry observations indicate that for-profit providers are implementing these solutions more rapidly. These findings should be interpreted within the context of the sample for this survey, which is entirely made of not-for-profit providers. Adoption rates may differ in the broader market, particularly among for-profit providers. With approximately 74% of skilled nursing facilities operating on a for-profit basis, and many of these organizations maintaining larger skilled nursing and post-acute portfolios, demand for referral management capabilities is likely to be greater among for-profit providers than among the average not-for-profit life plan communities represented in this survey (source: CMS).

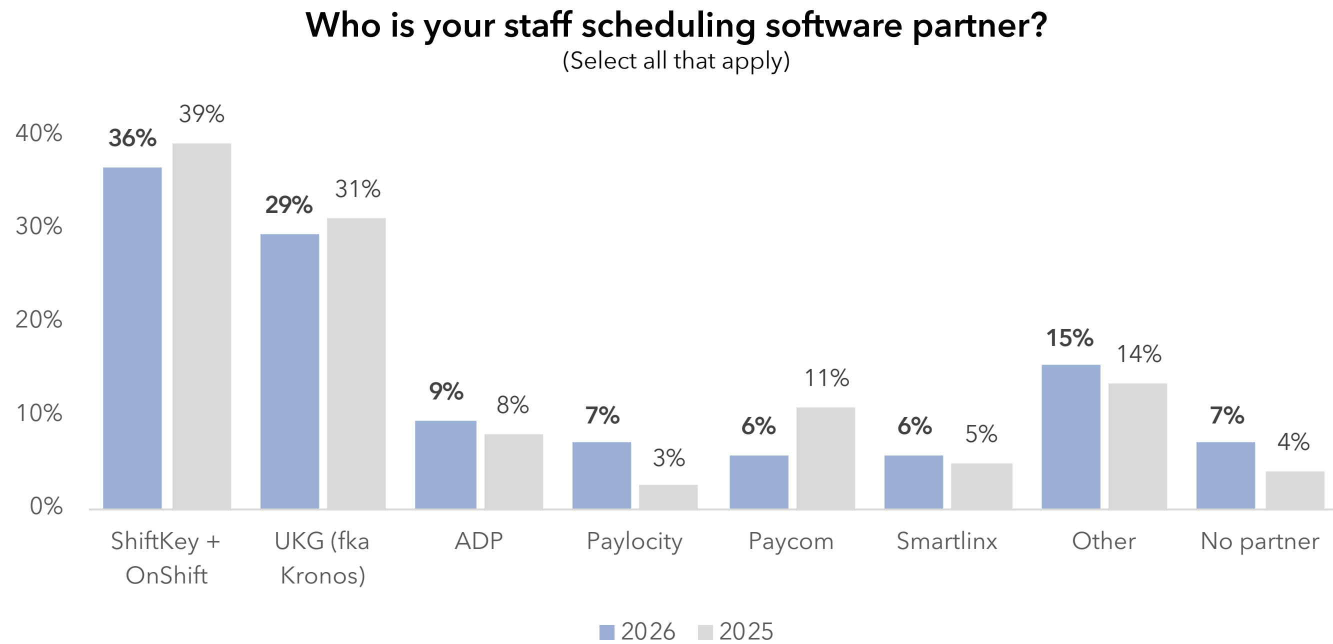
2.04 Home- and Community-Based Services (HCBS) Technology



As home- and community-based services (HCBS) grow in importance among senior living and care organizations, software and hardware solutions for this market are proliferating. This year's survey shows MatrixCare and WellSky continuing to lead the sector, with numerous smaller tech companies rounding out the market. In total, almost 20 distinct companies were named by survey respondents, with many solutions being designed for specific parts of HCBS, such as home health, home care, or hospice. Likely due to this specialization, it is not uncommon for HCBS providers to report using more than one technology partner to manage their services.

Respondents with no HCBS offerings were not included in this question, so our data reflects only those who offer these services.

2.05 Staff Scheduling Softwares

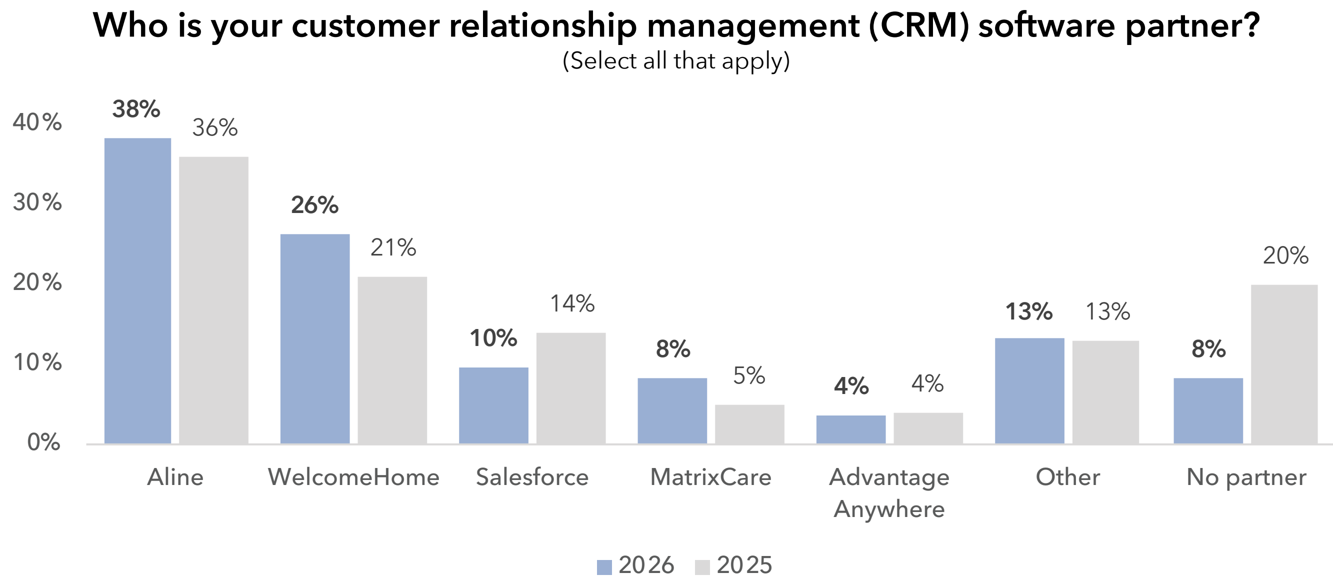


Staff are core to any senior living and care community, and that means managing complex schedules. Fortunately, technology has advanced most of the industry beyond the manual spreadsheets, phone calls, and sticky-notes of yesteryear. It is now highly unusual not to use staff scheduling software in a not-for-profit senior living and care community, with just 7% of this year's respondents reporting no vendor partners for this function.

ShiftKey + OnShift and UKG remain the dominant forces in the staff scheduling technology market this year, but there are numerous smaller companies with meaningful footprints as well. The larger number of organizations serving this segment suggests that the market remains fragmented, with providers selecting solutions based on their specific operational needs rather than converging around a single dominant platform.

The outcomes of the 2026 survey are very similar to 2025, demonstrating a relatively high degree of consistency in this function. It is unlikely that a large proportion of senior living and care providers are dissatisfied with and looking to replace their scheduling software, and this is contributing to the relative stability in the market.

2.06 Customer Relationship Management (CRM) Software

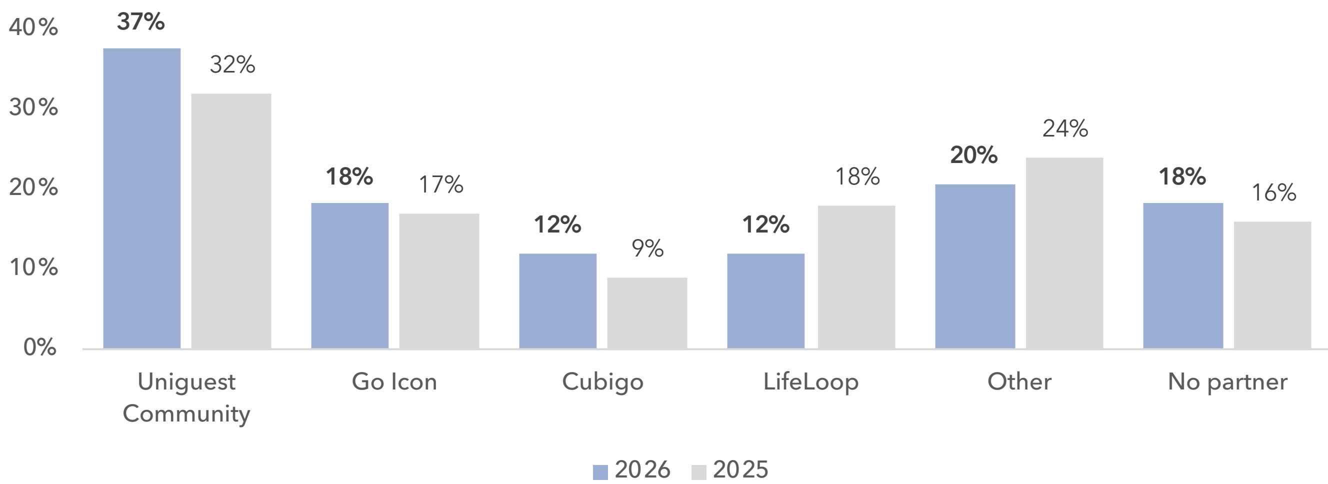


The share of survey respondents who indicated having no CRM partner has halved since last year and now sits below 10%. This indicates a rapidly growing consensus that sophisticated CRM functions are a necessity for successful modern senior living and care providers.

With just 8% of survey respondents indicating they do not use CRM software, down from 20% last year, investment in customer relationship management platforms is clearly widespread. Aline and WelcomeHome have emerged as leading partners, but several other vendors continue to capture meaningful adoption, suggesting that organizations are seeking solutions that align with their unique sales, marketing, and operational needs.

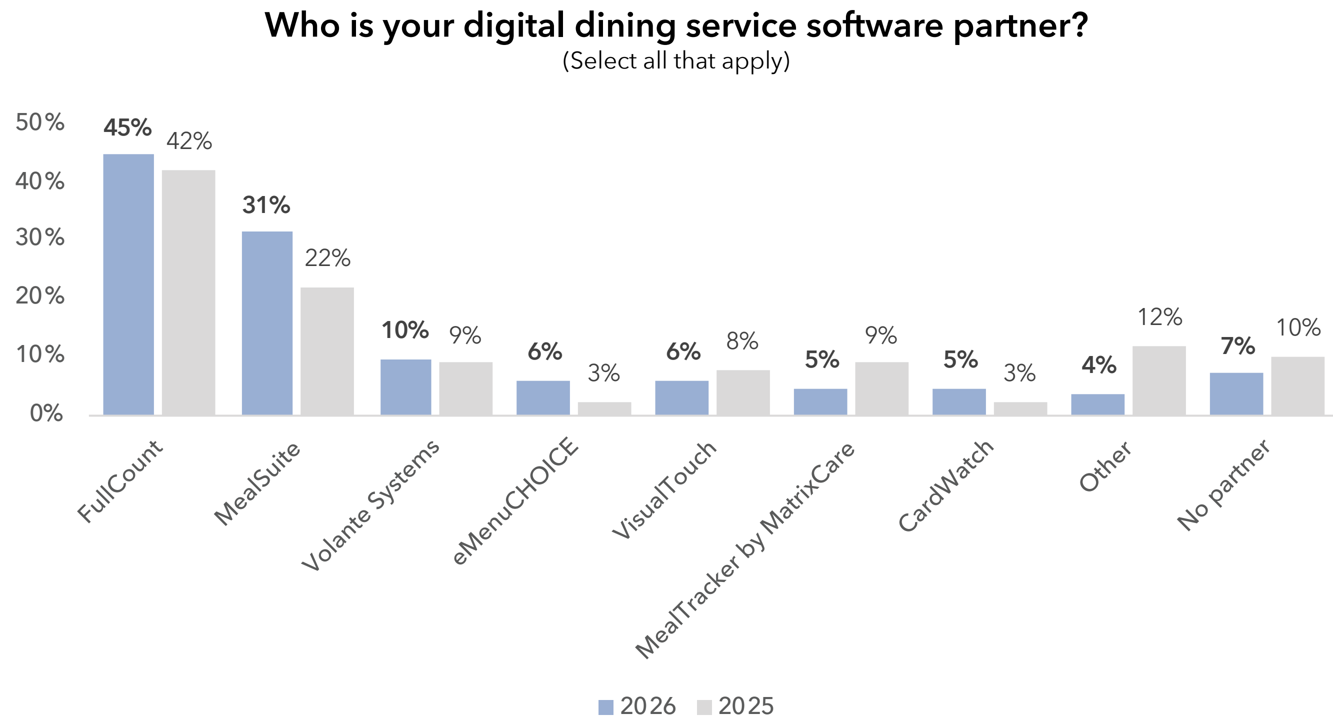
2.07 Social Connectedness and Engagement Technologies

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



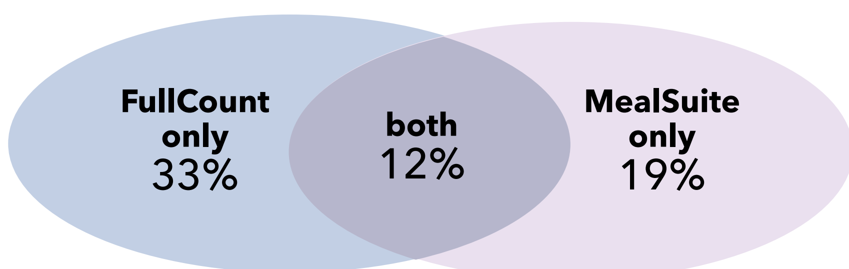
Uniguest remains the clear market leader among social connectedness and engagement software solutions, with Go Icon, Cubigo, and LifeLoop all holding meaningful market shares. But the sector is far from consolidated. Approximately 15% of respondents indicated they use more than one platform in this category, suggesting that organizations often rely on multiple solutions to address different aspects of their engagement needs, such as resident engagement, family communications, digital signage, analytics, calendars, smart-community technology, and more. The use of multiple partners may also reflect the diverse audiences served by these platforms, as organizations sometimes deploy separate solutions to support residents in different settings, such as independent living versus memory care. This trend may also reflect a continued search for best-in-class functionality as providers work to enhance the resident experience and support evolving resident expectations around engagement and wellness.

2.08 Digital Dining



Digital dining solutions are another nearly universal solution among our respondents, with a mere 7% reporting not having such a partner. This underscores the widespread desire for solutions that enhance both staff efficiency and resident experiences.

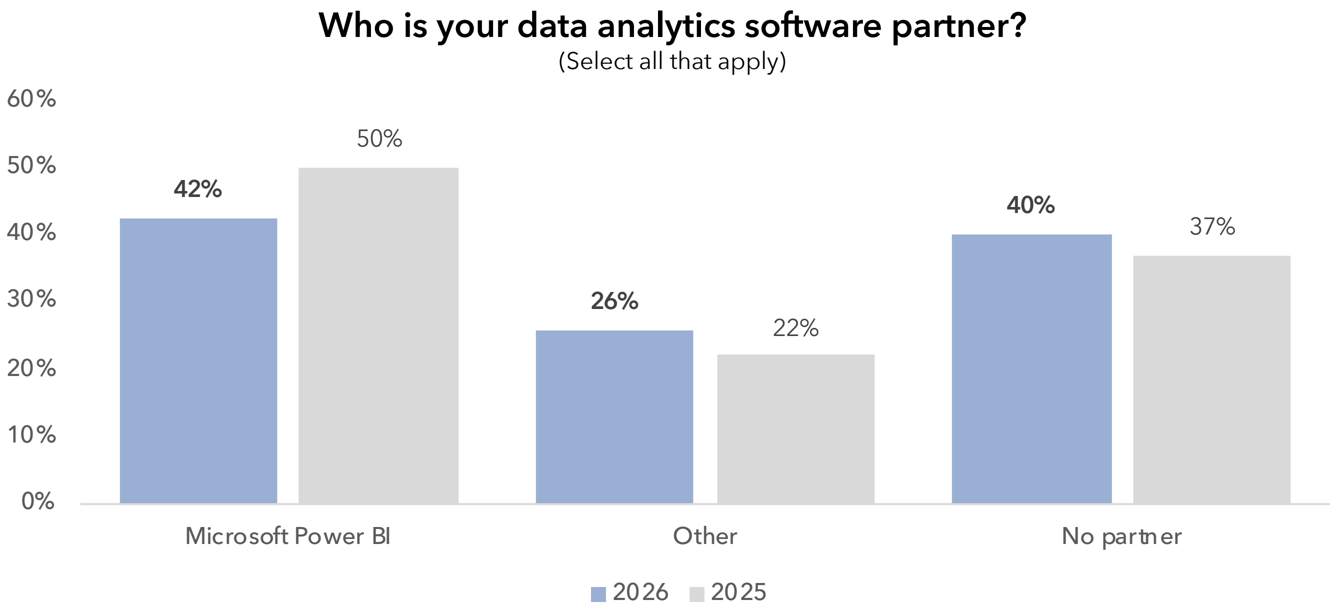
FullCount and MealSuite have substantial leadership positions among digital dining solutions for senior living and care. They are also often used in tandem:



This may reflect complementary capabilities, with FullCount being a particularly strong front-of-house solution, while MealSuite is often cited as a leading back-of-house tool.

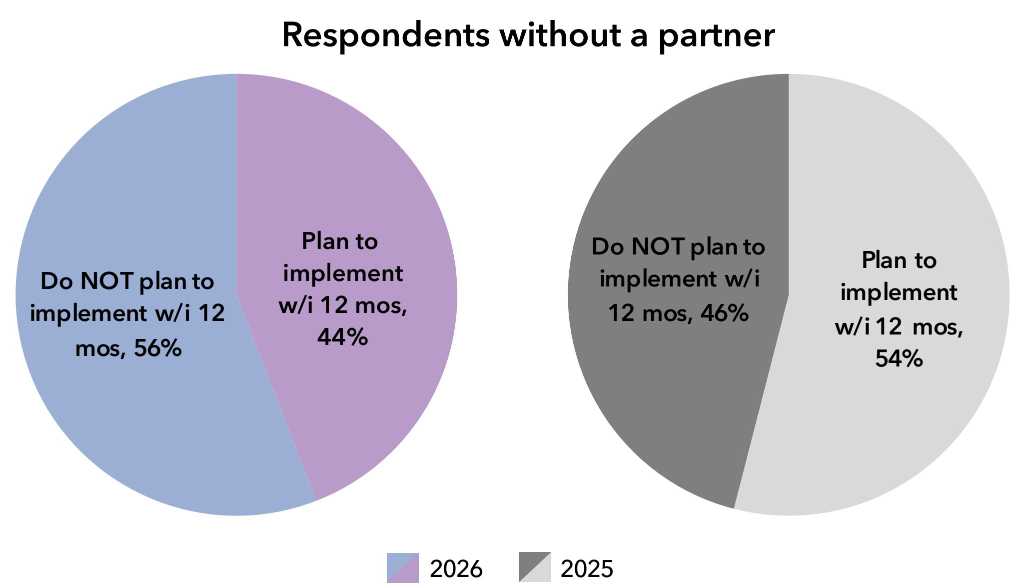
Several other vendors maintain a meaningful presence within the market, and respondents identified a few platforms not reported in the 2025 survey. Collectively, these findings suggest that while a couple of market leaders remain strong, the digital dining technology landscape remains dynamic, with organizations continuing to evaluate and adopt solutions that best meet their operational and resident experience objectives.

2.09 Data Analytics Softwares



Data analytics adoption continues to grow across the senior living sector, with Microsoft Power BI establishing itself as a clear market leader used by 42% of respondents. Numerous other vendors are present in the market, but none has more than 5% market share.

Notably, 40% of respondents report not having an analytics solution. However, nearly half of those are planning to implement one in the next 12 months, as seen in the pie chart below.



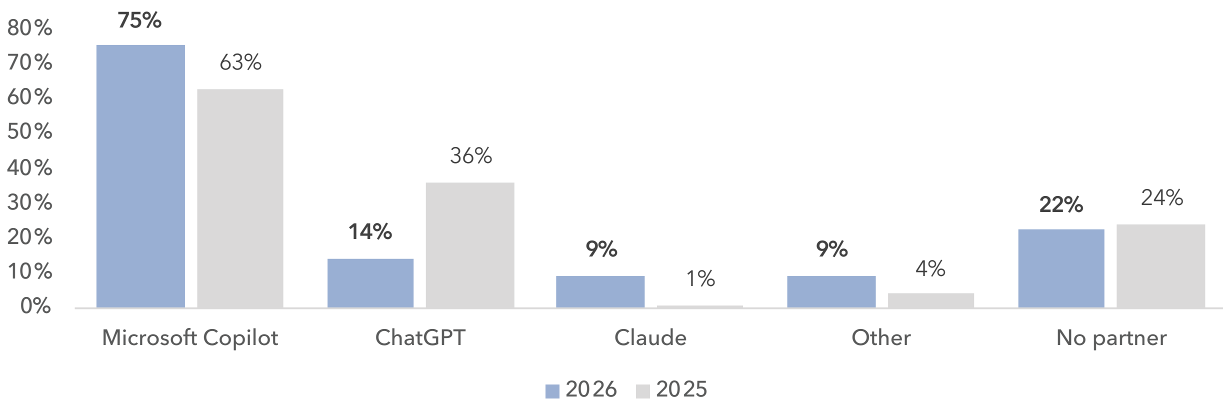
This could indicate a significant opportunity for sophisticated analytics tools in this sector to grow over the coming year. However, one must have a healthy dose of skepticism when considering this year's responses in light of last year's.

Last year, nearly the same percentage of respondents reported having no partner (37% in 2025 versus 40% in 2026). More than half of them reported planning to adopt a partner in 2026.

And yet, in 2026, the percentage of respondents without a partner has slightly ***risen***. So, while there may be significant desire to find a data analytics partner in the coming year, there is some question as to whether this will actually lead to adoption of a platform.

2.10 Large Language Models (LLM)

Which large language model (LLM) solutions does your organization currently pay for under an enterprise subscription?
(Select all that apply)

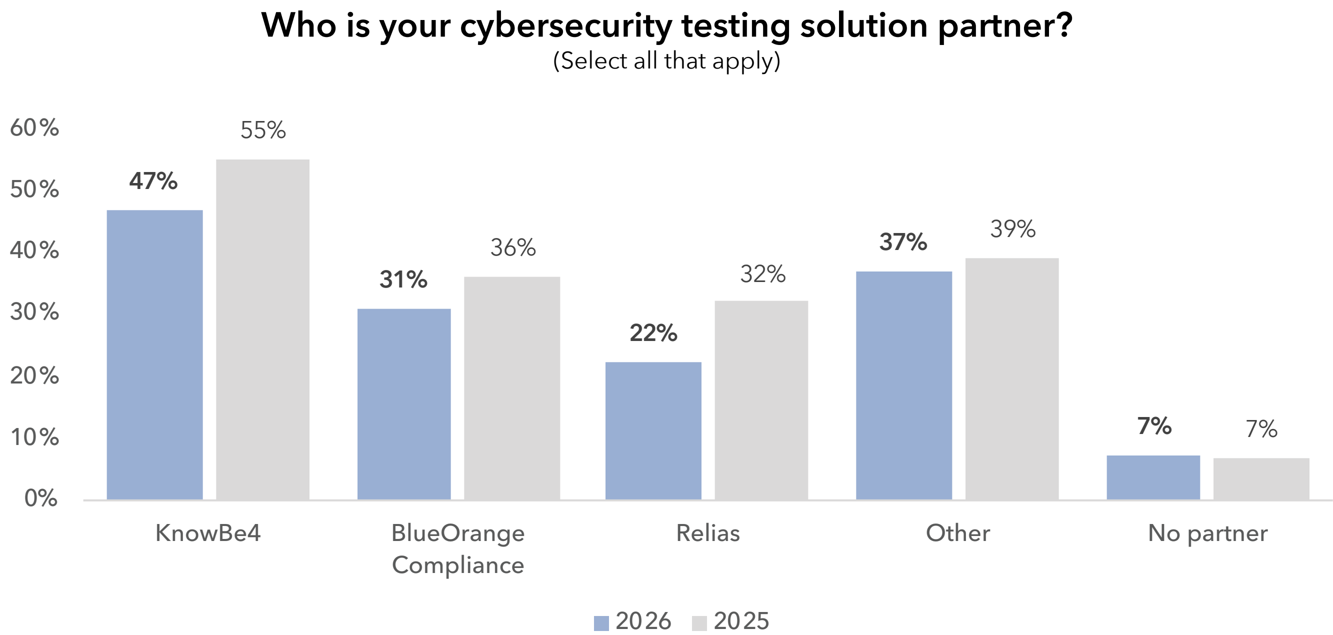


Enterprise adoption of large language models (LLMs) continues to accelerate across the senior living sector, with Microsoft Copilot further solidifying its position as the dominant solution. Copilot usage increased from 63% of respondents in 2025 to 75% in 2026, likely driven by its seamless integration with the Microsoft ecosystem already used by many providers.

In contrast, ChatGPT adoption declined from 36% to 14%, while Claude increased significantly from just 1% in 2025 to 9% in 2026. The loss of dominance for ChatGPT in enterprise settings and rise of Claude mirror broader market trends, even outside of senior living and care (source: Forbes). The results suggest that organizations are increasingly moving toward enterprise-grade AI solutions that offer stronger security, governance, and integration capabilities.

Additionally, 12% of respondents indicated plans to implement an enterprise LLM solution within the next 12 months, signaling that adoption is likely to continue expanding in the near term.

2.11 Cybersecurity Partners



Cybersecurity testing is a well-established priority among survey respondents, with only a small number indicating they do not currently have a partner. KnowBe4 remains the clear market leader, used by 47% of respondents, followed by BlueOrange Compliance and Relias. However, there is a high degree of diversification, with 24 other vendors named by survey respondents.

Notably, many organizations are leveraging multiple partners rather than relying on a single solution. Over one-third of respondents reported using two or more partners for cybersecurity. This trend suggests that organizations may be overlapping solutions to address different aspects of cybersecurity, compliance, workforce training, monitoring, and risk management. In an industry with a high and rising degree of operational complexity, we expect cybersecurity to continue being a priority. For further information, see **4.04 Cybersecurity Practices**.

2.12 Standout Partners

We asked each of this year's survey respondents, "Of the tech solutions currently in use on your campus(es), which is your standout partner and why?" We combed through dozens of answers. The two companies with the most mentions were:

- **PointClickCare** (mentioned by 17% of all respondents)
- **Go Icon** (mentioned by 9% of all respondents)

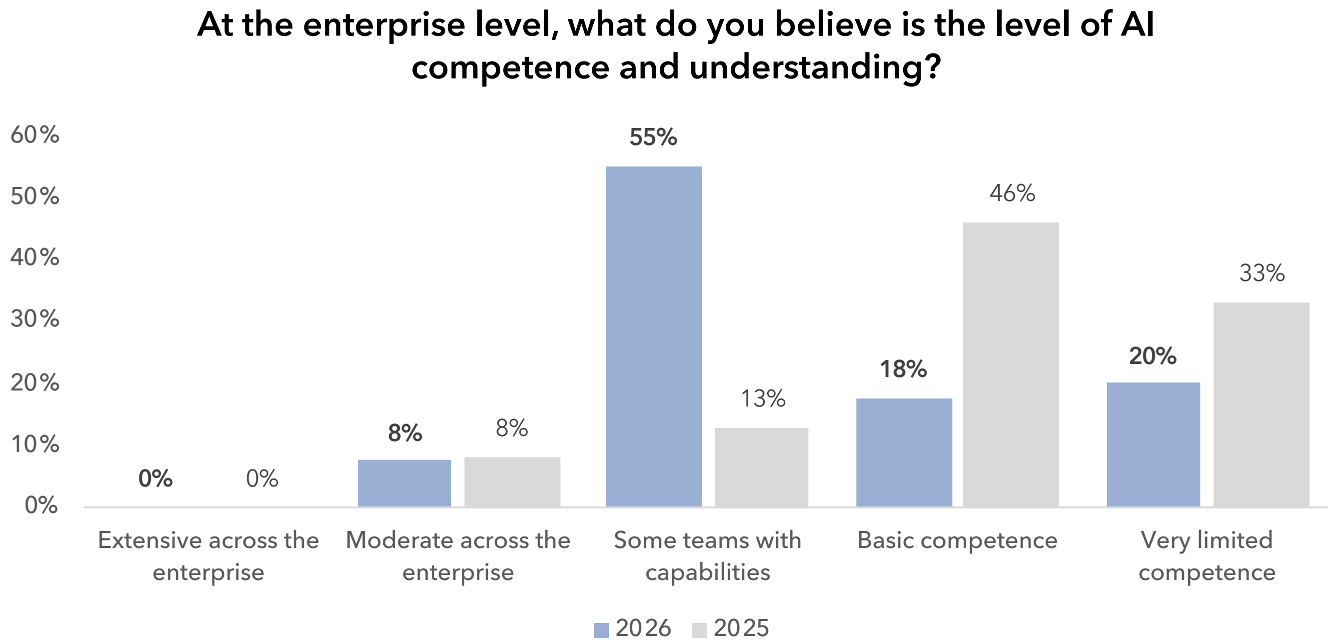
In a free-response field, getting this much recognition is a sign of significant support for PointClickCare and Go Icon. Fortunately, respondents told us what they like so much about each solution:

- **PointClickCare** received praise from numerous respondents for its ease of integration with other key technologies. The value of simple, reliable integrations with other technologies is a key theme in our industry today. When core systems like an EHR do not seamlessly support integrations, providers often feel constrained and left without many options to innovate. PointClickCare, fortunately, has used its industry-leading position to throw open the doors to innovation, creativity, and customization by enabling robust integrations and consistently upgrading its own product. PointClickCare's critical clinical and billing data can easily be used for a variety of analytics and programs across an organization without duplicative input or fragmented systems. This, combined with a strong partnership mentality, is undoubtedly core to its position as a top industry partner.
- **Go Icon** users shared diverse praise for their engagement partner. One indicated excitement about strong resident adoption; another called it a "game changer" for residents to connect with each other; and a third was pleased by how much time and money had been saved by transitioning to a digital engagement and communications solution after years manually managing these functions. Overall, Go Icon's continued innovations and deep partnership with clients seem to make them a cherished partner.

Section 3
Artificial Intelligence and Automation

3.01 AI Competence, Confidence, and Concerns

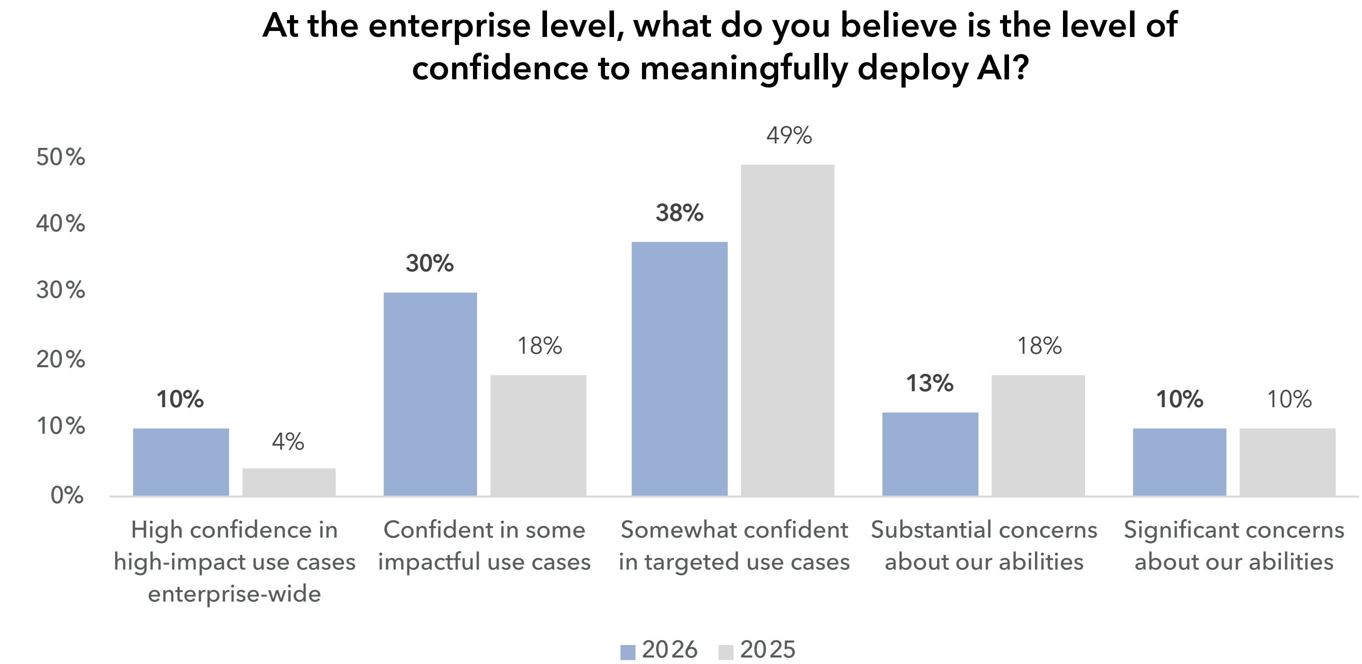
This year's report asked respondents, "At the enterprise level, what do you believe is the level of AI competence and understanding?" They were presented with five options to choose from and responded as displayed in the chart below.



The first thing one notices is that not a single respondent reported extensive capabilities across their enterprise again this year. The top ranking any respondent is willing to give their own organization is "moderate," and that represents a mere 8% of survey-takers. However, over half of respondents say select teams or individuals within their organization have reasonable AI competence. The remaining 38% report either "basic" or "very limited" capability.

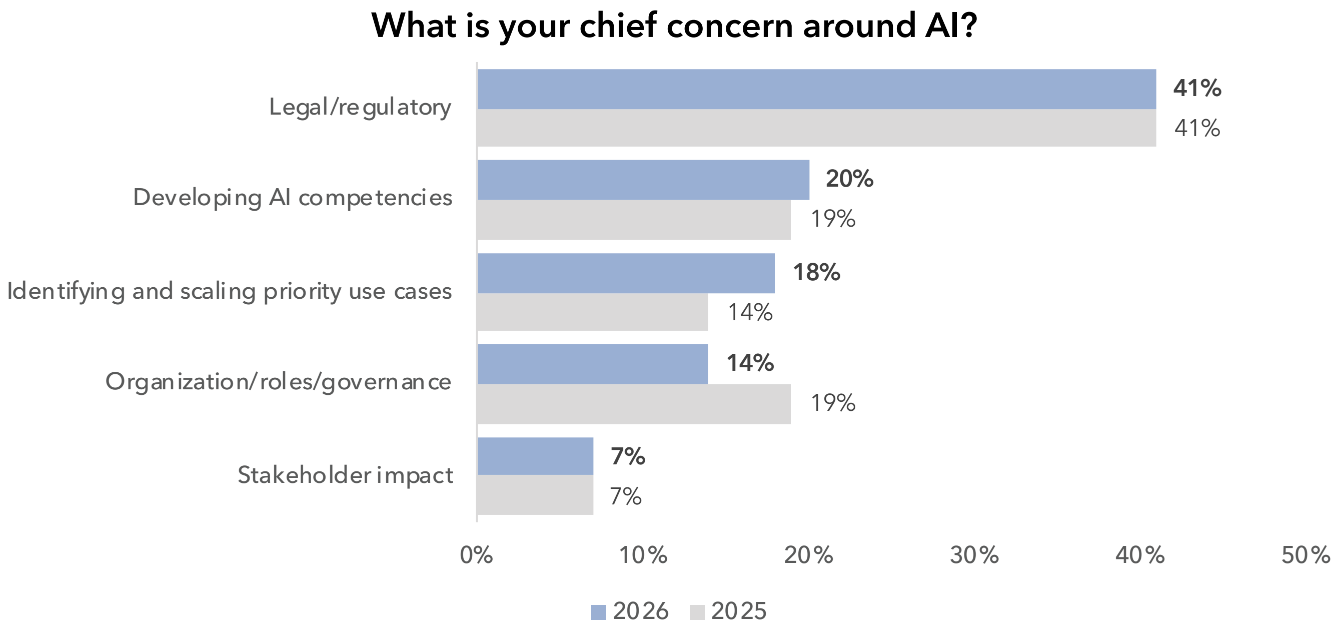
This is a marked improvement from last year, with a meaningful percentage of those who reported "basic" or "very limited" competence in 2025 now having moved to the middle bucket in 2026.

As we see competence increasing, so too is confidence in AI's abilities to improve senior living and care operations. We next asked respondents, "At the enterprise level, what do you believe is the level of confidence to meaningfully deploy AI?" and again provided five options. Their responses are illustrated below.



Since last year, the "high confidence" category has more than ***doubled***. There is an overall trend upward in respondents' confidence that their organizations can meaningfully deploy AI. Yet, just like last year, we still see 10% of respondents reporting significant concerns about whether their teams will be able to make an impact with AI.

So, what is creating concern for providers? Regardless of how respondents rated their organizational confidence in AI, they had fairly similar answers when asked to rank their concerns with these emerging technologies. Their top concerns ranked in this order:



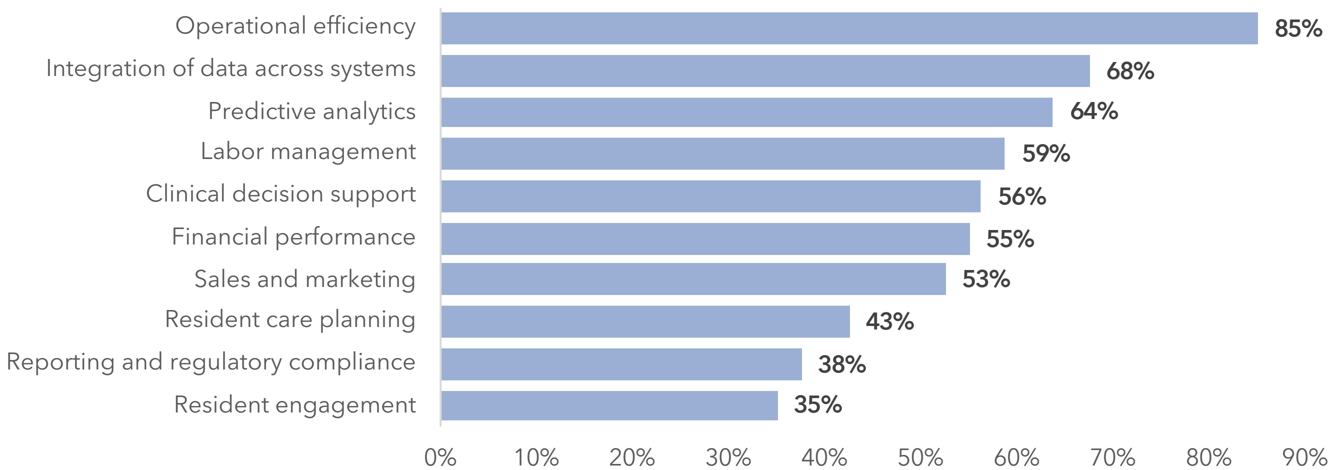
By a significant margin, survey-takers' greatest concerns surrounding AI are related to legal and regulatory issues (which was the top issue among 2025 respondents as well). This concern is not unreasonable, especially for organizations that manage significant amounts of protected health and personal data for residents, patients, and staff. The US has not created comprehensive or easy-to-understand regulations around AI, and with AI capabilities growing and use cases proliferating rapidly, there are many legal unknowns.

We call upon our partners, especially those who lobby on behalf of this industry, to press for reasonable, actionable regulations and guidance to help providers adopt technology safely and impactfully without expending excessive time, effort, and money trying to predict what regulations may eventually be implemented.

3.02 The Potential of AI

A new question added to this year's survey was: "In which areas do you see the greatest opportunity for AI to support your organization in the coming year?" Respondents were presented with a list of ten organizational functions and asked to select all that apply. They were ranked as follows.

In which areas do you see the greatest opportunity for AI to support your organization in the coming year?
(Select all that apply)



What we found most interesting in this list is that resident-facing options were ranked in the bottom half: sales (#7), care planning (#8), and engagement (#10). The top three items, meanwhile, can broadly be classed as data and workflow management priorities. These findings align with the prevailing ethos among most providers: that AI is optimal for reducing repetitive, data-oriented tasks on screens. When it comes to direct interactions with residents, the human touch remains paramount. To paraphrase a particularly eloquent comment from one survey respondent:

"Technology-focused back of the house.
Human-centered front of the house."

– Jon Fletcher, CEO, Presbyterian Homes & Services

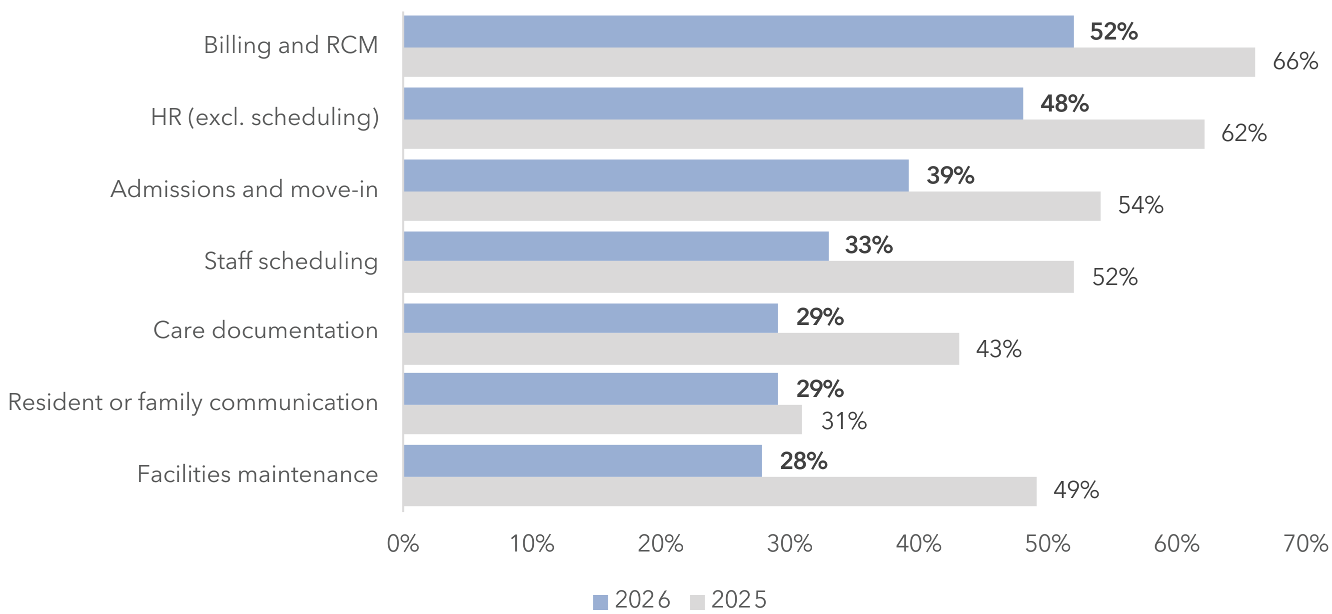
Fortunately, leveraging AI across proprietary data sets and optimizing workflows accordingly enables staff to use their time in the ways that are most impactful: interacting with residents. Resident interaction is frequently a driving factor for staff to work in the senior living and care field, typically being a much more motivating and interesting part of their roles than crunching numbers or inputting data. By prioritizing AI applications that remove repetitive, burdensome tasks from staff, providers not only enable them to spend more time with residents but also be less preoccupied and more present in those interactions.

3.03 Automation

AI is making it possible to entrust previously time-consuming, highly manual tasks to computers, but in the broader world of automation there are even more possibilities. Over 85% of respondents to this year's survey reported having implemented some kind of automation in their organizations.

Survey respondents were asked "In which of the following operational areas has your organization implemented or made plans to implement automation?" With nine options provided, they could select as many as applied to their organization. The most popular are ranked below.

In which of the following operational areas has your organization implemented or made plans to implement automation?
(Select all that apply)



These rankings are quite similar to last year, but overall enthusiasm for automation has decreased, possibly reflecting CTOs turning their attention to AI, specifically, rather than more general automation technologies.

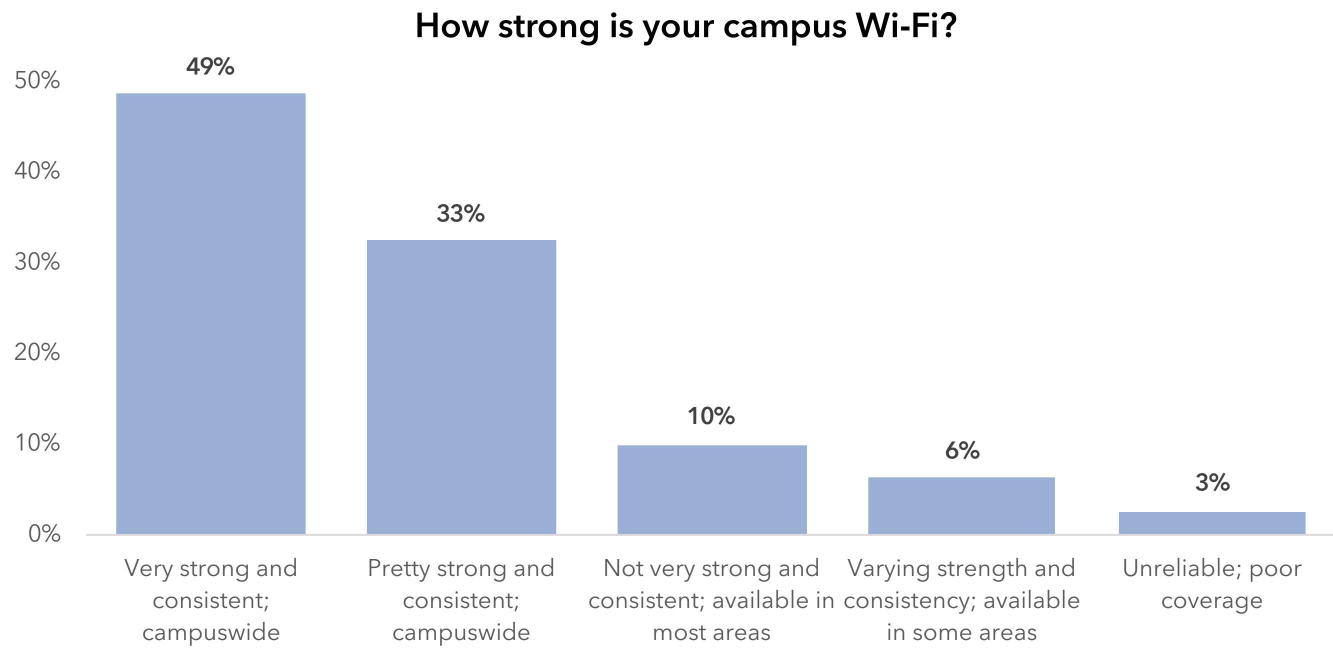
Billing and revenue cycle automation, and processes related to payroll, are particularly compelling top-ranked topics for the second year in a row. The complexity of financial management for life plan communities is incredible, incorporating private payments, insurance billing, recurring monthly fees, and one-time invoices for services as diverse as a full move-in and an hourlong art class. Payroll can be complicated by overtime payments, incentive payments for taking hard-to-fill shifts, and temporary staff PRN coverage, not to mention the challenges inherent in managing a workforce that traditionally has high turnover. Automating core processes in these functions can substantially reduce unnecessary expenditures of staff time and effort.

It is interesting that financial performance is relatively far down the list of functions respondents said AI could impact in **3.02 The Potential of AI**, while billing and RCM are at the top of the automation rankings. This may reflect the perspective that many finance functions that take significant human input today are repetitive enough they could be simplified with automated technology simpler than AI. For instance, sending out monthly invoices and automated follow-ups to delinquent payers does not require the relatively advanced degree of sophistication of AI, but can be managed by basic automated computer processes. There are numerous companies combining high-quality services and innovative technology to resolve financial management challenges (e.g., Sunbound), and this may be a significant area for growth in the coming years.

Functions that received very few votes from respondents (who could select as many options as they liked on this question) and therefore do not appear on this graphic include procurement/inventory management and medication management.

Section 4
Technology Infrastructure

4.01 Wi-Fi



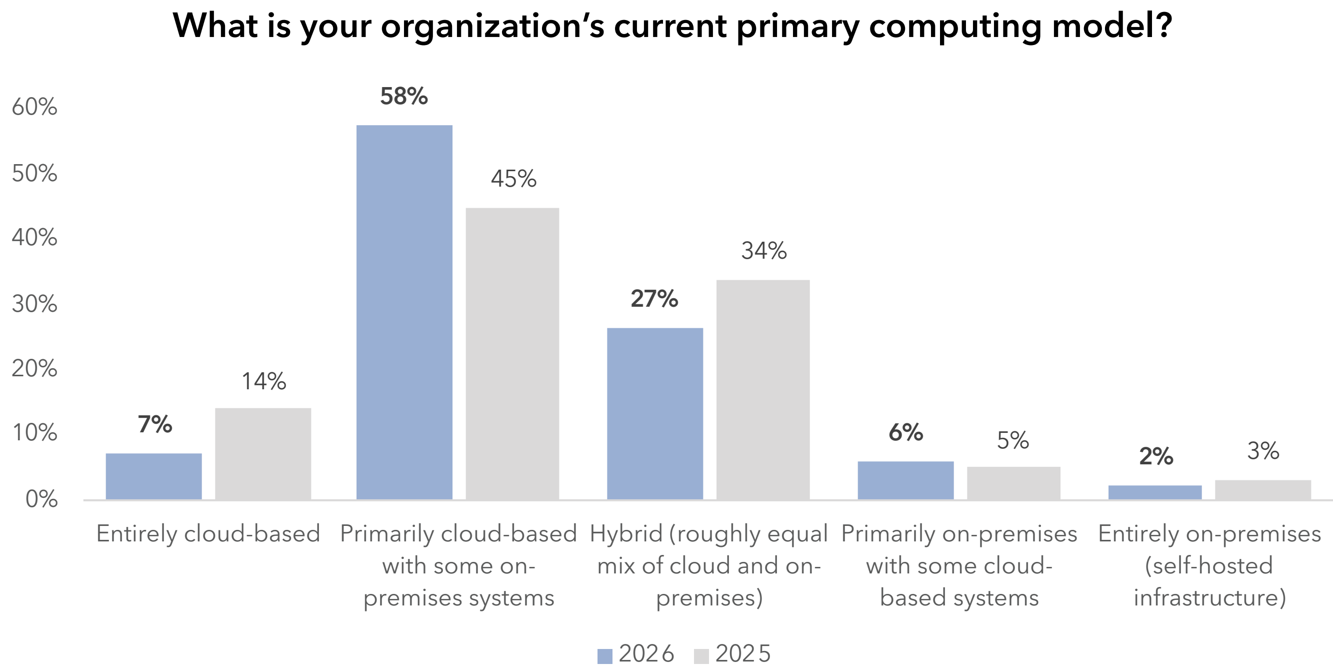
Americans increasingly view Wi-Fi not as a luxury, but as a basic utility, necessary for communication, healthcare, financial management, and accessing essential services such as government benefits. Older adults are no exception to this trend, and the importance of Wi-Fi to organizational digital readiness led us to add a question about Wi-Fi to this year's survey.

As seen in the **5.03 Expectations** section of this report, strong, consistent Wi-Fi in both public and private spaces of senior living campuses is viewed as a necessity by residents. It is reasonable, then, that the vast majority of respondents to this survey indicated their organization has invested in delivering "very strong" or "pretty strong" Wi-Fi campuswide.

Wi-Fi is not only key to the resident experience, but also the staff experience. Staff are accustomed to heavily using technology in their personal lives and expect a similar level of enablement in the workplace, with a particular preference for mobile-first tech solutions (here again, reference **5.03 Expectations** for more detail). Having spotty or inconsistent access to Wi-Fi makes it difficult to provide these tools.

For organizations beginning or accelerating their digitization journeys, a professional evaluation of connectivity campuswide can be an invaluable resource. By identifying and addressing connectivity shortcomings before investing in new technologies, providers can ensure they are building their technology stack on a stable foundation and avoid wasting time and money on pilots doomed to fail by a preexisting lack of infrastructure.

4.02 Computing Models



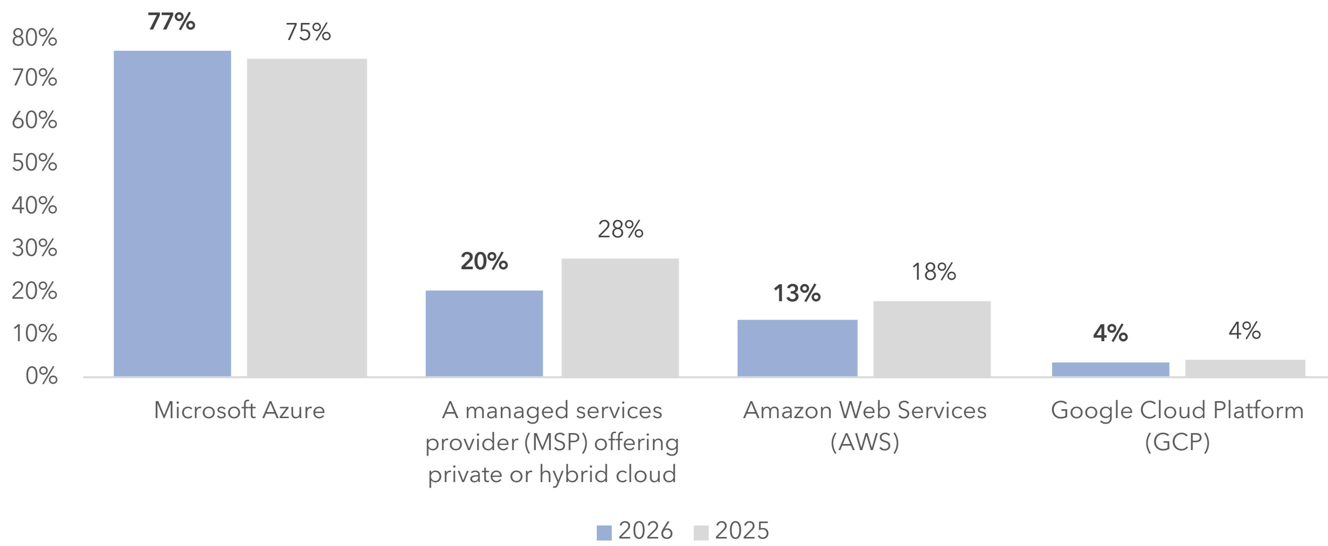
The not-for-profit senior living and care sector seems to be reaching a consensus around the most effective computing model: primarily cloud-based, with some on-premises systems. Among respondents, 58% use this combination, with another 27% using a more balanced mix of cloud and on-premises systems. This evidently offers providers the best of both worlds: cloud computing offers agility, scalability, and reduced maintenance at the expense of some control, while on-premises solutions require significant upfront investment and ongoing in-house management but provide total control over hardware and reduce reliance on external partners.

This same computing model was the most popular last year, but has made gains since that time, with entirely cloud-based and hybrid computing users moving toward the primarily-cloud model.

Once again this year, Microsoft Azure is by far the most popular cloud computing provider for survey respondents, with MSPs coming in a distant second. Amazon Web Services (AWS) and Google Cloud Platform (GCP) also registered on our survey, but at low levels of adoption.

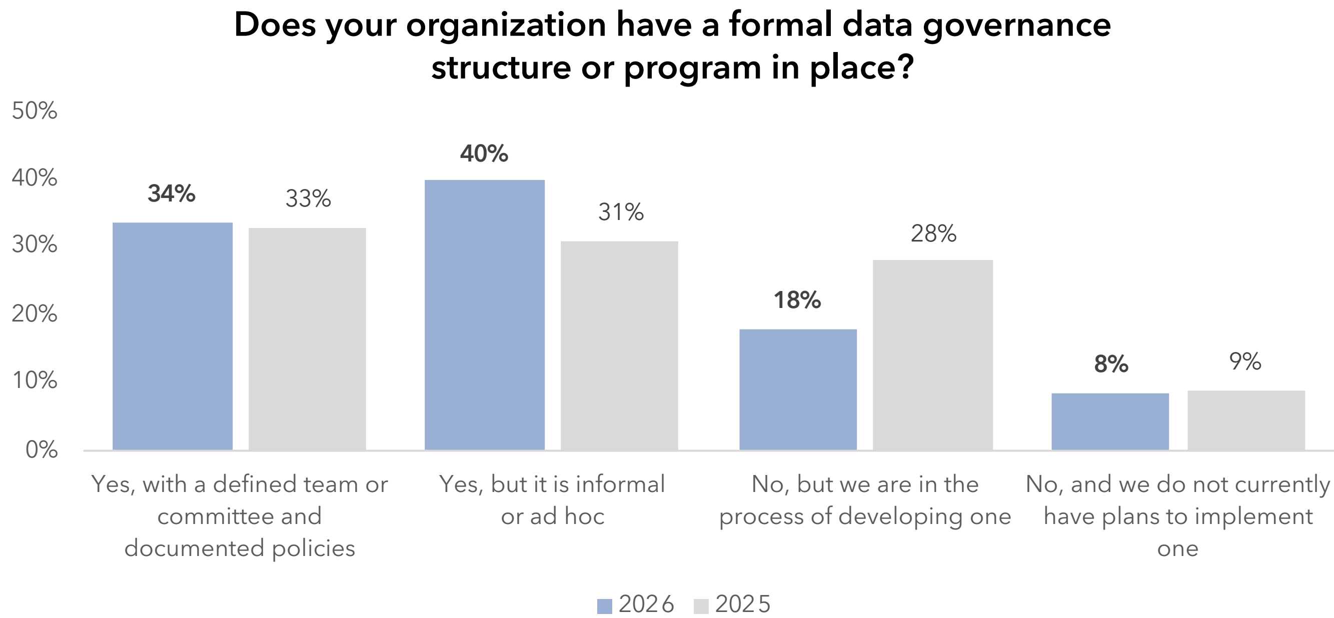
What cloud providers of platforms do you currently rely on?

(Select all that apply)



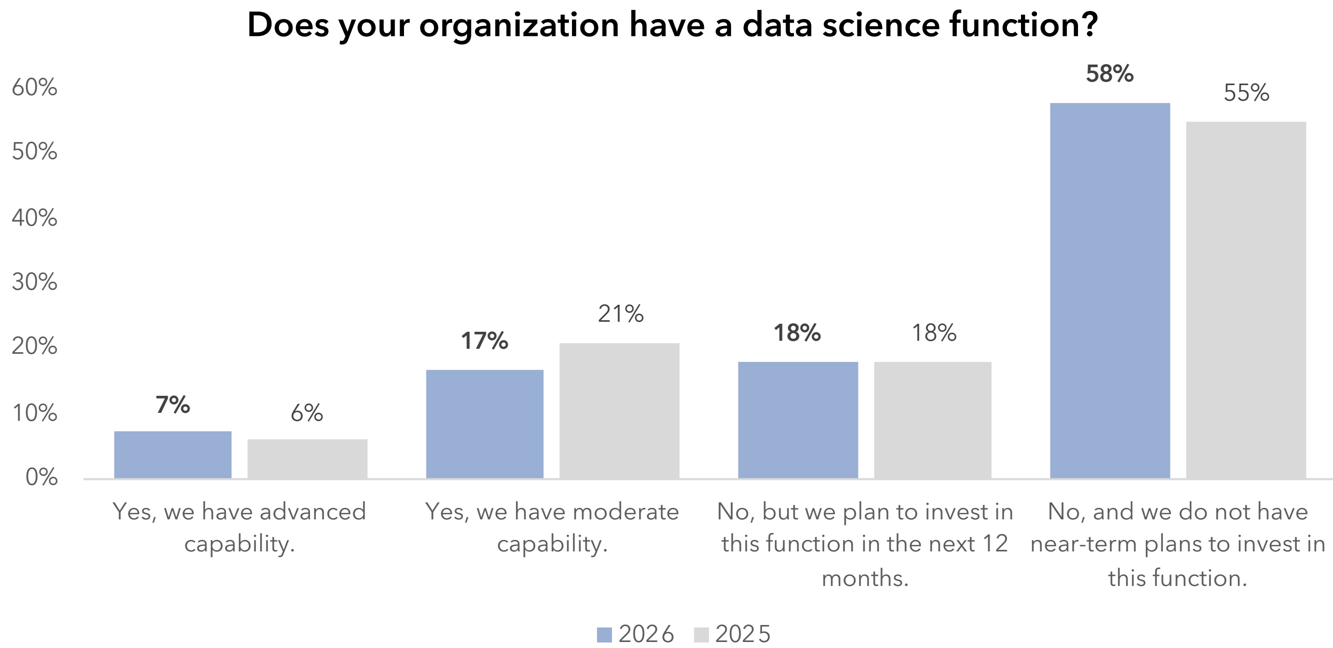
4.03 Data Governance Structures and Data Science Practices

When adopting significant information technology, data governance is key not only to security but in standardizing data to maximize its analytical value.



In this year's survey, nearly three-quarters of respondents indicated their organization maintains a data governance program, although most of those are informal or ad hoc. This is an improvement compared to last year, when roughly 10% of respondents who stated they planned to implement a data governance policy appear to have done so. While most of these seem to still be informal, it is a marked shift in the right direction.

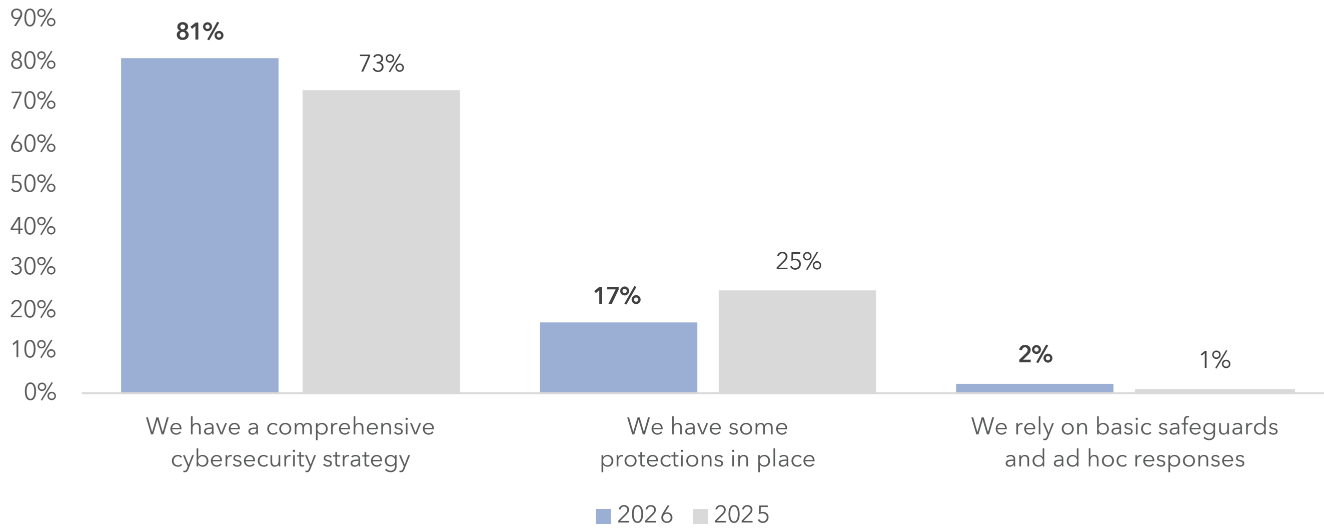
Data science generally requires robust data governance policies. While this year, like last, we did not see an extremely high rate of respondents reporting they have invested in data science capabilities, we would expect to see greater adoption of this function as time goes on and data governance advances. Given it is presently not a priority for nearly 60% of respondents, this may be a slow change taking place over multiple years.


Does your organization have a data science function?
60%
50%
40%
30%
20%
10%
0%
7%
6%
17%
21%
18%
18%
58%
55%
Yes, we have advanced capability.
Yes, we have moderate capability.
No, but we plan to invest in this function in the next 12 months.
No, and we do not have near-term plans to invest in this function.
2026
2025

4.04 Cybersecurity Practices

Strong cybersecurity practices are non-negotiable for any organization in 2026. Daily headlines inform the public of the latest phishing or ransomware attacks, and personal inboxes fill with spam. While new technology solutions come packaged with extensive security features, strong centralized cybersecurity defense remains a must. Fortunately, the senior living and care industry is taking these threats seriously and building strong cybersecurity defenses accordingly.

How would you describe your organization's current cybersecurity preparedness?

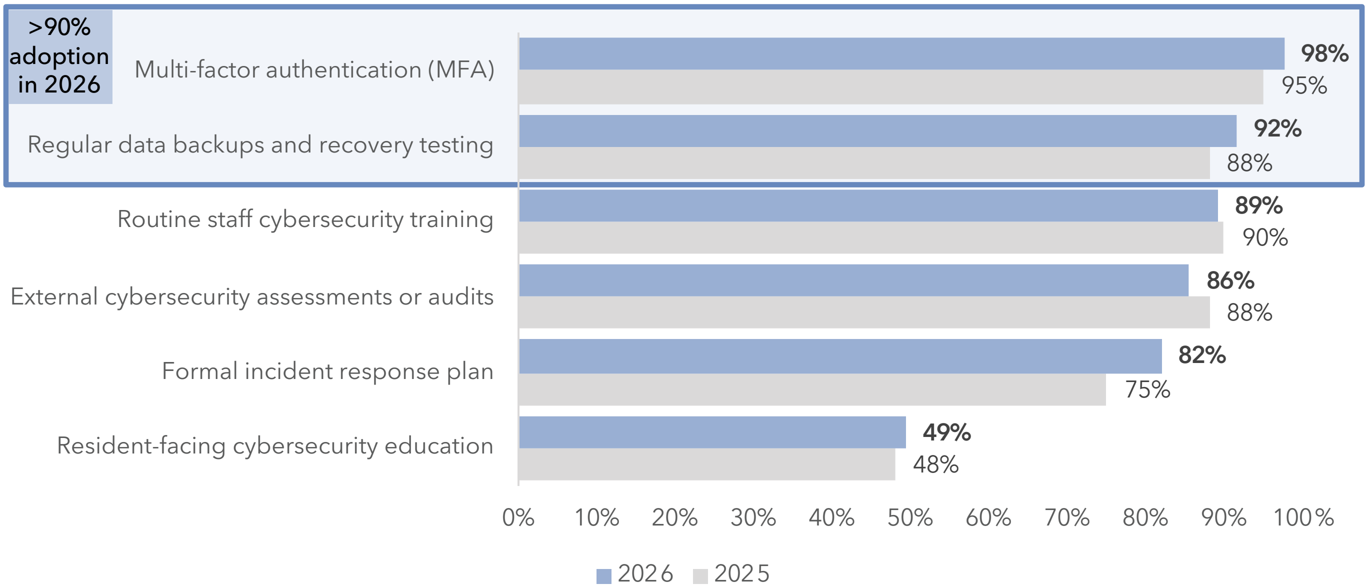


More than 80% of survey respondents reported having a "comprehensive cybersecurity strategy," including regular training, monitoring, and incident response plans. This represents an improvement over last year.

As was the case in 2025, an extremely small number of respondents still report having only "basic safeguards" with which to defend against cyberthreats. These organizations are in a precarious position: one significant cyberattack, without a well-coordinated response, can lead to a significant HIPAA breach, data being held for ransom, or operations being interrupted at the expense of resident wellbeing. There are dozens of steps providers can take to protect themselves against cybercriminals. The following are the most popularly adopted strategies among survey respondents.

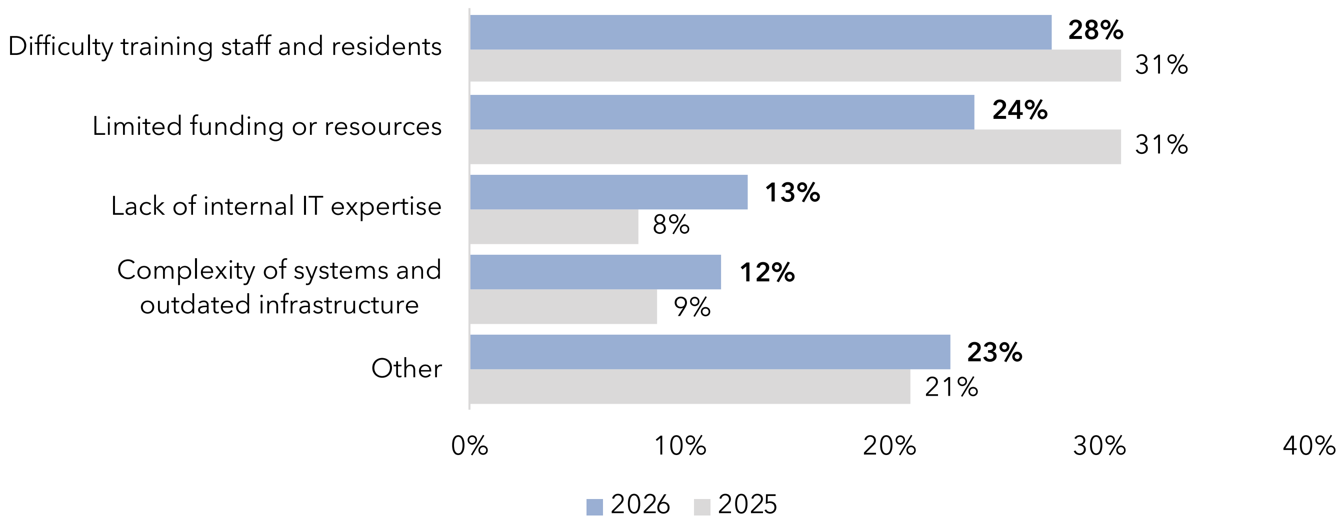
Which of the following cybersecurity practices has your organization implemented?

(Select all that apply)



It is concerning how few respondents report resident-facing cybersecurity education as a priority. While residents are less likely than staff to have access to sensitive components of the organizational tech stack, human elements – whether resident or employee – are the most vulnerable parts of any cybersecurity plan. Respondents even acknowledge this when asked about the greatest challenges they face in improving cybersecurity protections.

What is the greatest challenge your organization faces in improving cybersecurity protections?

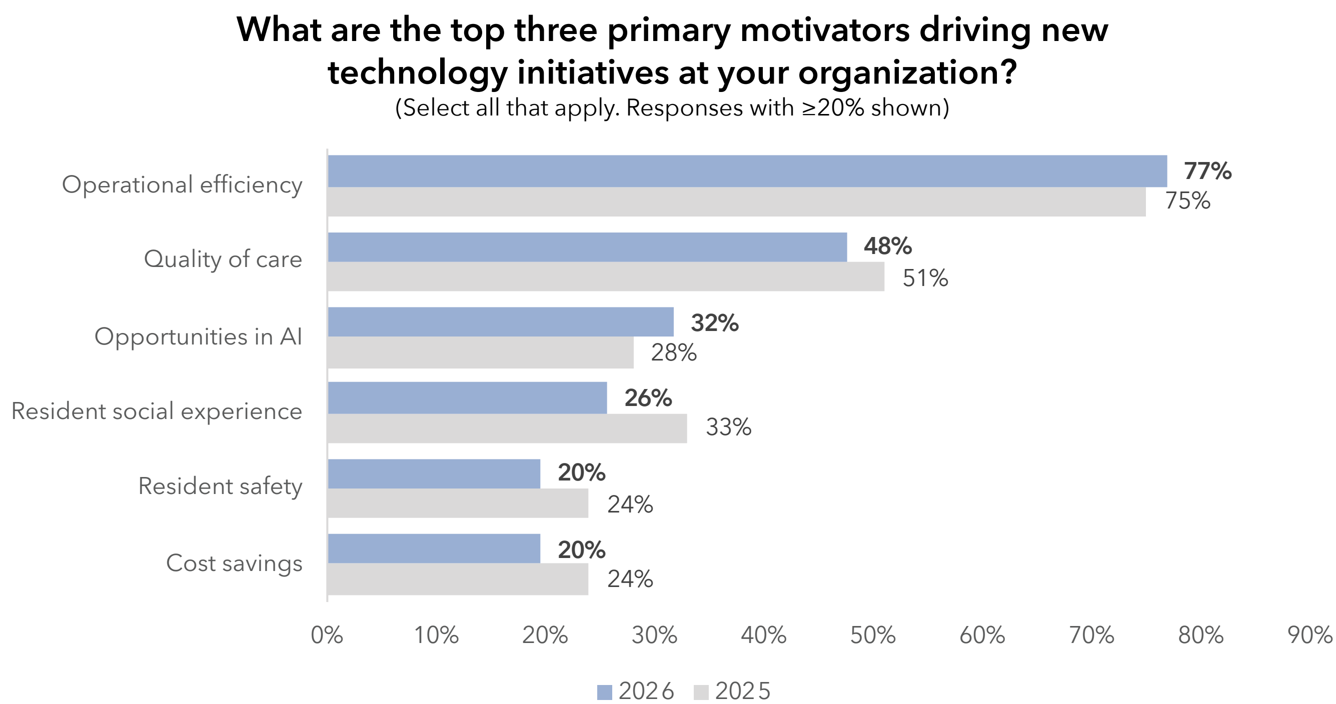


Two of the top three greatest challenges respondents report are human-related: difficulty training staff and residents (#1) and lack of internal IT expertise (#3). Written comments from the *CTO Hotline* survey also emphasize the criticality of the human element. For example, as phishing becomes more advanced and convincing, making sure staff and residents are consistently being diligent, thoughtful, and discerning – especially if they are not digital natives – is extremely challenging.

Section 5
Technology Planning

5.01 Motivators for Technology Adoption

Despite its complexity, providers continue to adopt new technology. We asked, "What are the top three primary motivators driving new technology initiatives at your organization?" The most-selected answers are below.



The motivators prompting respondents to continue adopting new technologies this year are remarkably similar to last year. By far the most-selected option is "increasing operational efficiency," with over three-quarters of respondents ranking this among their top three reasons for continuing to pursue new technology solutions. This aligns well with the opportunities identified for AI and automation in **3.02 The Potential of AI** and **3.03 Automation**.

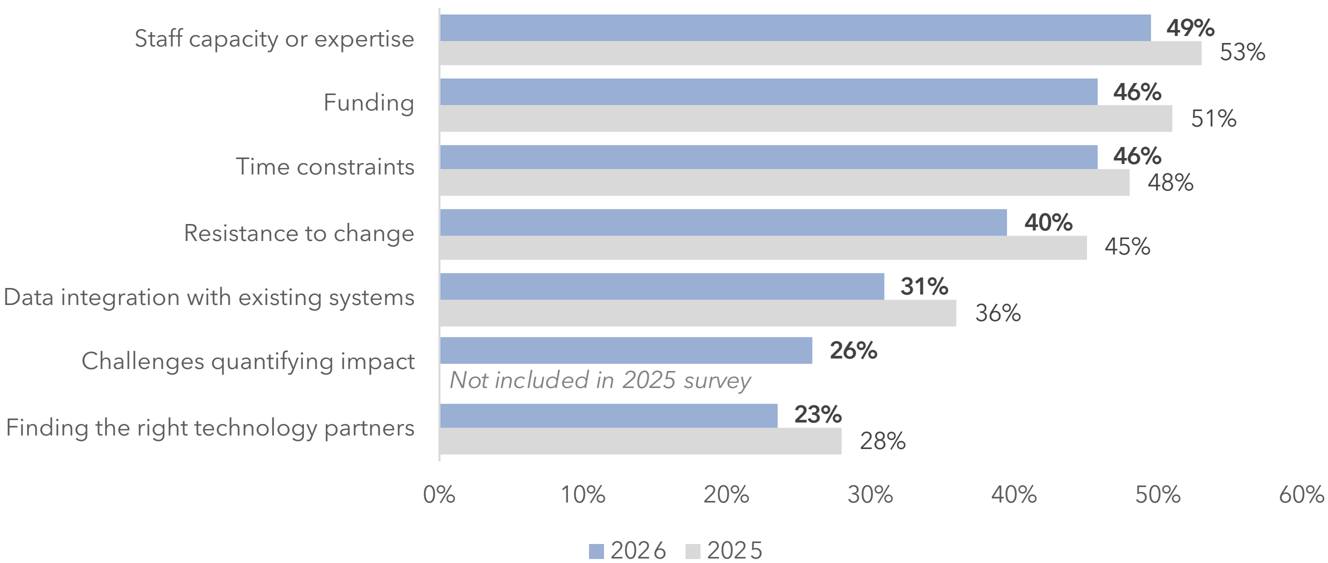
In fact, nearly a third of respondents stated that emerging opportunities with AI push them to adopt new technology. Among all the answers to this question, this is the only one that attributes technology adoption to opportunities becoming available in the industry, rather than needs that need to be addressed within organizations (e.g., operational efficiency, resident care/engagement/safety, and saving costs).

Several motivators that were suggested in the survey but selected by less than 20% of respondents are not included in this chart. These include meeting regulatory compliance standards, addressing staff shortages, attracting new residents, pursuing new revenue opportunities, enabling value-based care, and enhancing security.

5.02 Barriers to Technology Adoption

Every organization faces different barriers when trying to adopt new technology. We asked, "What are the top three primary barriers driving new technology initiatives at your organization?" The most-selected answers are below.

What are the top three barriers your organization faces in effectively implementing new technology initiatives?
(Select up to three. Responses with ≥20% shown)



As was the case last year, the top three barriers to successful adoption of new technologies are shortages of people, money, and time. This chart does not include barriers selected by less than 20% of respondents, including outdated infrastructure, lack of leadership buy-in, and regulatory and compliance concerns (despite this being the highest concern for adopting AI, as seen in **3.01 AI Competence, Confidence, and Concerns**).

The 2026 *CTO Hotline* specifically asked this year's respondents whether tech fragmentation is a significant challenge for them. As discussed in **2.12 Standout Partners**, smooth tech integration has not always been guaranteed.

We are happy to see an increasing number of tech vendors offering strong, easy-to-use integrations that make it simple to use multiple different technologies without requiring duplicative data entry or negotiating multiple data silos. But the work is far from over. Tech fragmentation continues to drive business challenges with **76%** of respondents citing fragmentation as an issue causing ***"duplicate work, disconnected workflows, inconsistent communication, and limited visibility into data,"*** according to one respondent. On the upside, even among those who still experience fragmentation challenges, a considerable number of respondents highlighted improved integration over the past two to three years in their comments. This is a robust indicator that providers strongly want and tangibly benefit from vendor partners providing excellent integration capabilities.

The survey also asked questions about the current capabilities respondents have for data reporting. By far, the most common sentiment was that presently available reporting tools are genuinely helpful and powerful resources, but they usually lack certain key data points that would make them easier to act on — a problem reported by **65%** of those surveyed. Users are left to manually pull outside data and either incorporate that data into the reports or at least mentally consider the findings together. Most providers, **78%** percent of respondents, would prefer to reduce these data silos to enable deeper and broader data analytics. This is a clear call to action for technology partners to continue investing in smooth data integration and actionable and customized reporting. This is further explored in **5.05 Investment Priorities in 2026**.

5.03 Expectations

One of the core drivers guiding innovation priorities is ever-increasing user expectations: What technology do residents and staff expect to see and use in a community? How do providers ensure they meet or exceed expectations, and never disappoint or drive away valued residents and employees?

Respondents shared with us numerous ways expectations are changing. The following summaries represent key findings.

2026 – How are Consumer/Resident Expectations around Technology Changing?

EXCELLENT WI-FI

- The most common finding among residents is the expectation of strong, consistent Wi-Fi to support all their devices. According to one respondent, this manifests as: ***"Higher desire to use technology tools, often requiring their own IP, much higher traffic for Wi-Fi."*** Residents specifically expect Wi-Fi will be free (included in monthly fees) and available anywhere they go on campus. One leader who took the survey noted other kinds of connectivity were in high demand as well, and their residents expected ***"in-building 5G repeaters so multiple cell carriers work across campus."***

UPGRADES ONLY

- Residents expect technology to match or exceed the quality of what they had in their previous home. One respondent noted that this applied to everything from internet strength to diversity of TV options. Another said, ***"Residents are moving into our communities already tech-enabled, with multiple mobile devices and streaming services. They expect connectivity and a technology experience that is as good as or better than their previous home."***

TECH SUPPORT

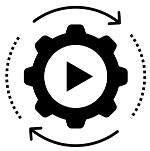
- Residents increasingly expect tech support to stay abreast of the latest developments. Respondents noted that many residents, especially younger ones, are moving in with lots of technology already in place but want to keep pace with new solutions. To use technology effectively and safely, they expect staff to provide concierge-level support, which can be excessively time-consuming. As one executive noted, ***"Residents have the ability to order meals through a portal, but still largely rely on staff to navigate the app. Adoption of new solutions such as our engagement/connectedness app and virtual tech support/education have historically been soft for similar reasons."***

ENTERPRISE GRADE

- Lastly, residents are expecting consistent enterprise-grade technology experiences when they move into a senior living and care community, akin to what they are accustomed to with banks, hospitals, and other institutions. For instance, ***"They are expecting more front-end technology during the sales process – less paper and more electronic signing and access to information instantly."***

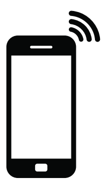
2026 – How are Staff Expectations around Technology Changing?

AUTOMATION AND AI PRIORITIZED



- Staff exhibit a sense of excitement around automation and AI, according to respondents. One said, ***"The primary expectation is automation and process improvements to reduce tedious/time consuming tasks,"*** while another reflected, ***"I think everyone is excited to let AI help us become more efficient."*** However, this excitement comes with anxiety as well. Several respondents noted that staff are fearful of what higher rates of automation and AI adoption may mean for their career longevity. This leaves leaders with the responsibility to simultaneously provide much-desired solutions for automation, including with AI, while also demonstrating to staff their continued criticality to meeting organizational objectives. This demands a high degree of tact and finesse, to ensure staff feel positive about the tech they are asked to use.

MOBILE-FIRST



- Staff are expecting information at their fingertips and available on-the-go, with mobile-first workplace tech becoming increasingly important. One survey respondent observed, ***"Staff want their work experience to be as modern and innovative as their personal experience."*** Given the familiarity most people have with their smartphones and the ease with which employees are accustomed to being able to rapidly access their personal data wherever they are, mobile-first tech options are increasingly the preference and expectation of staff. Mobile-optimized functions like voice-to-text are also in demand.

ZERO DOWNTIME

- Staff expect technology to have easy set-up and zero downtime. With an emphasis on making work more efficient, employees will reject any technology that puts barriers in the way of starting and completing their work. If a solution does not demonstrably improve their workday, or causes slightly too many small frustrations throughout their shift, they will reject it. One survey response reads, ***"Staff want more and better technology and they want it to work well 100% of the time."***

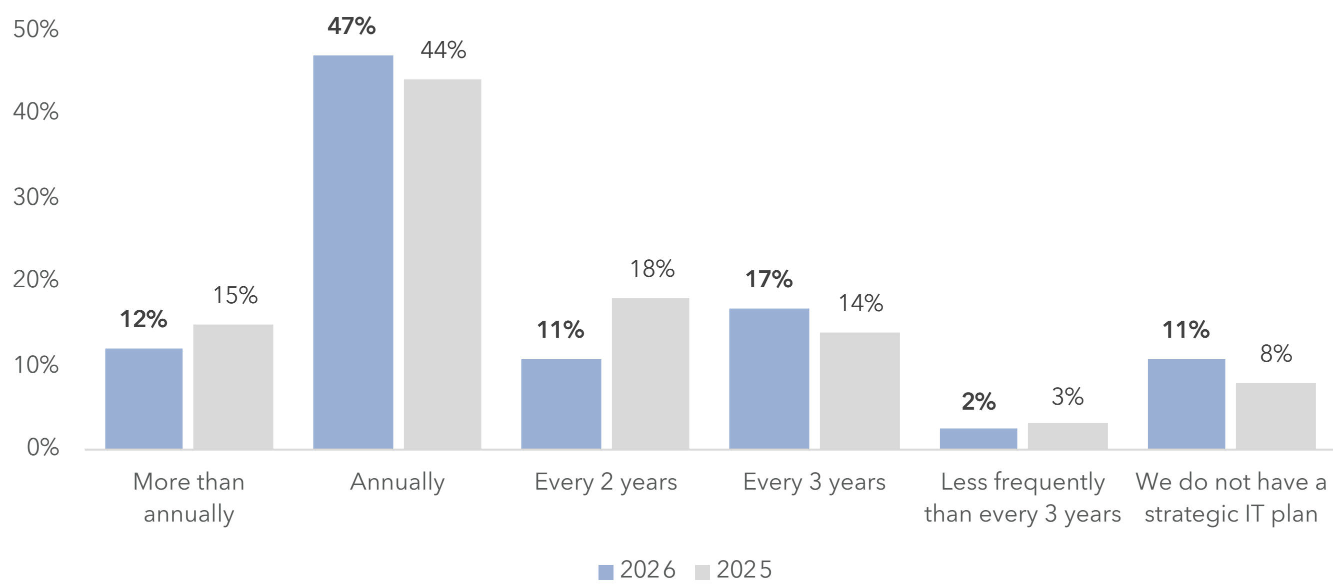
Important Note: Generational Differences

Expectations are diverging between older, more experienced staff and younger, newer staff. One respondent said, ***"I observe challenges of low technical aptitude of existing staff while newer staff demand current technology solutions."*** This becomes especially challenging when one faction of staff members actively resists adopting new technologies while more junior colleagues are voicing an expectation for tech upgrades. To make technology roll-outs successful, engaging both resisters and supporters early in the technology decision-making process can help to ensure robust overall buy-in. As the generational mix of active staff shifts toward more digital natives, providers can expect more widespread interest in advanced tech among their teams. As one survey-taker reported, ***"Staff are becoming more willing to use technology to help them with their jobs. I've been here for 15 years, and the shift has been significant in the past 5-7 years!"***

5.04 Strategic IT Plans

Strategic IT plans have become a core component of many providers' planning processes, ensuring that new technology initiatives are aligned with the goals of the broader organization. As one respondent said, this kind of planning avoids different teams across the organization committing ***"random acts of technology,"*** and ultimately becoming reliant on solutions that do not fit the rest of the organization's plans. The rapid pace of technology advancement incentivizes updating these plans frequently.

How often do you update your strategic IT plan?

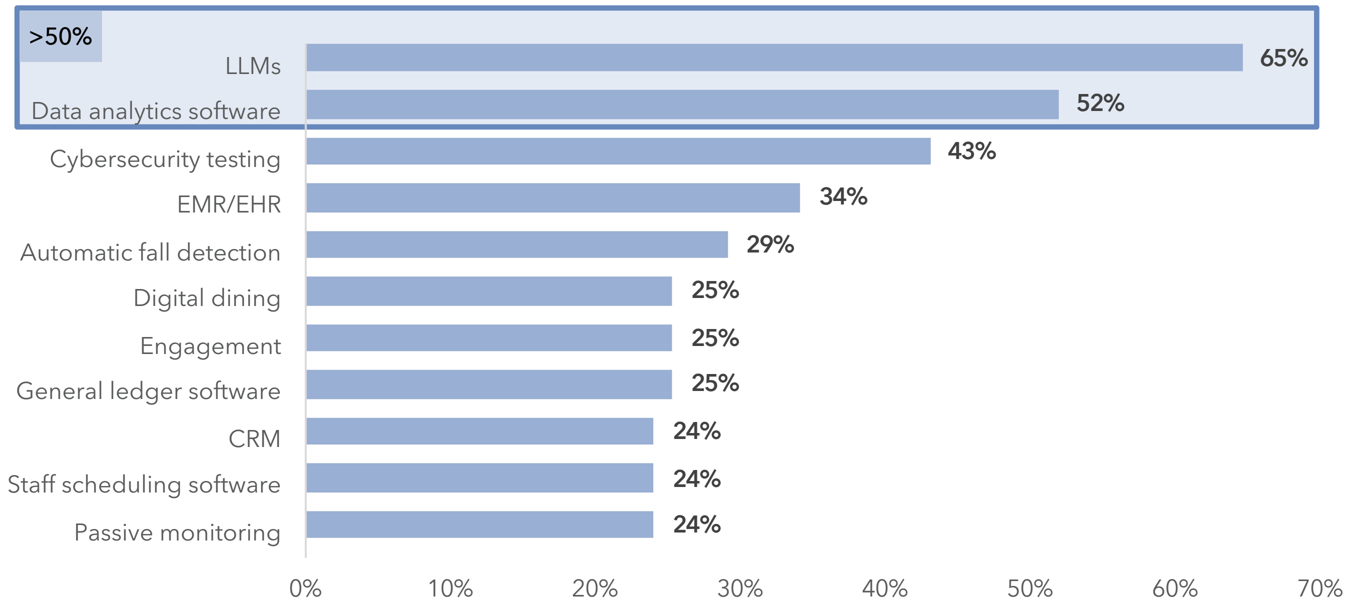


In this year's survey, over half of respondents reported updating their strategic IT plans at least annually. Only a small proportion (11%) do not have a strategic IT plan at all. This roughly matches with last year's data, reflecting that annual or slightly more frequent updates are the prevailing norm.

5.05 Investment Priorities in 2026

Which areas of technology will your organization invest more in during 2026?

(Select all that apply. Responses with ≥20% shown)



Survey respondents were asked to select every category of technology where they expected to prioritize investment during the rest of 2026. LLMs are the top of the list, with nearly two-thirds of organizations prioritizing these capabilities. Relatedly, data analytics software is a priority for over half of respondents.

As organizations modernize their technology environments, cybersecurity is increasingly viewed as a foundational element of those efforts, with 43% of respondents looking to invest in solutions in the coming year.

Opportunities for technology partners in not-for-profit senior living and care communities are clearly expansive, with many providers ready to evaluate and buy new tech. We especially wish to highlight the value of vendors who can show an ROI from making use of preexisting data sets. Technology partners are powerful allies for the senior living and care industry when they can leverage the data providers already collect to deliver insights and prompt action. This underscores the importance of interoperability (explored in **5.02 Barriers to Technology Adoption**) and emphasizes that vendors that collect data have very little value to add if they do not also interpret and clearly report on that data, supporting humans in making decisions and taking meaningful action. This is part of a larger transition in the industry. A conference attendee we recently had the pleasure of speaking with noted:

> *"Systems of record have been dominant for years. But they can't hold a candle to systems of action."*

Put differently: EHRs, CRMs, and other reliable technology systems for holding data have been the nerve center for organizations of all kinds since the beginning of the digital age. AI and automation are making it possible for new systems to be not just repositories of data, but users of data that take action, instigate change, and empower decision-making in novel ways. These will become the cores of not only senior living and care communities, but all other kinds of organizations as well.

Section 6
Implementing Change

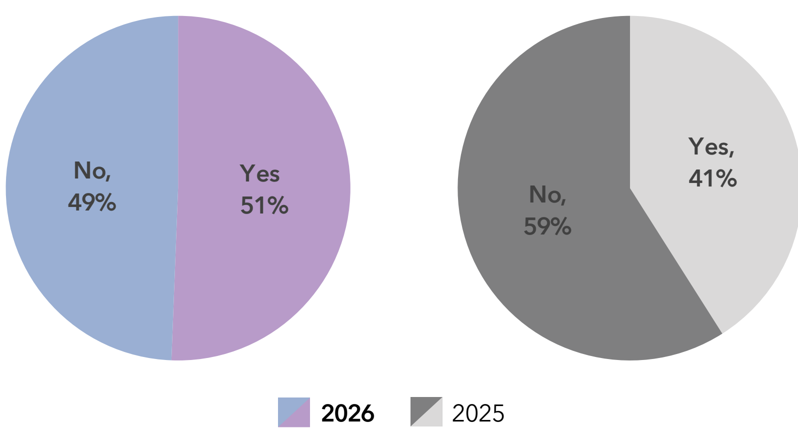
6.01 Technology Committees

Technology adoption decisions cannot be made in a vacuum or unilaterally by the C-suite. As one respondent to this year's *CTO Hotline* survey said,

> *"We need to introduce solutions based on need and not force-feed new workplace tools from our ivory tower at the leadership level."*

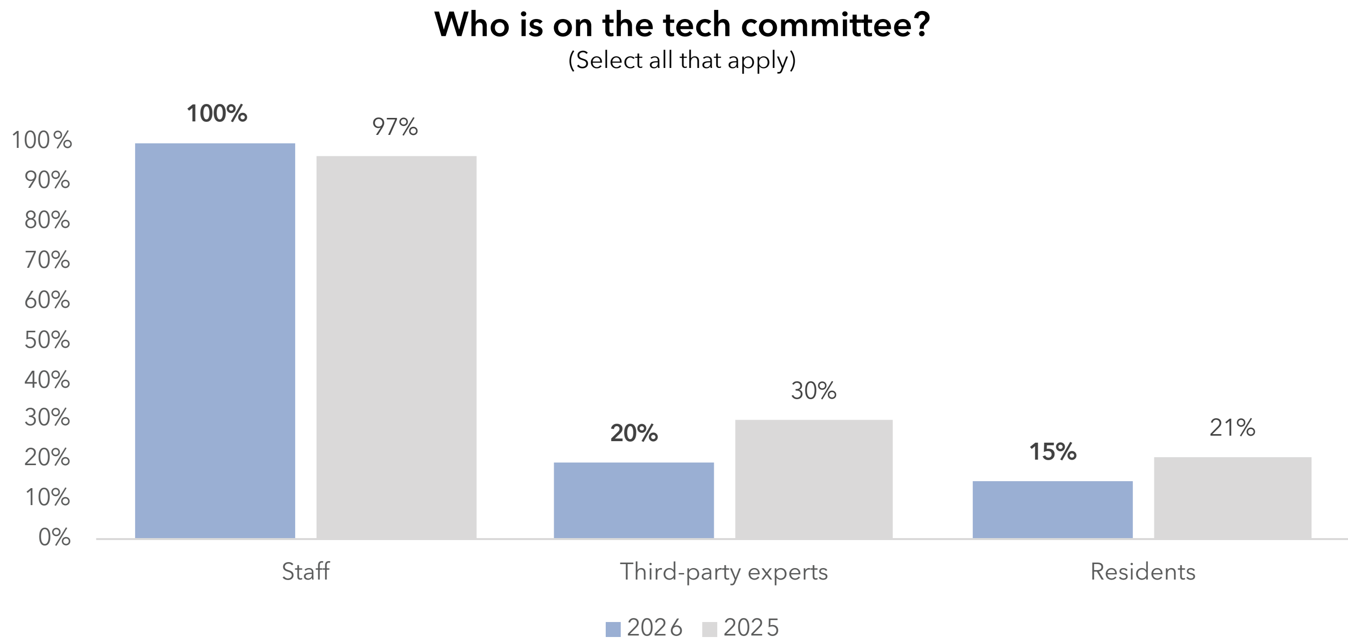
To identify the real needs that technology can address and ensure needs are widespread enough for solutions to have a major impact, many providers are creating dedicated committees.

Does your organization have a centralized committee responsible for the governance of key innovation and/or IT activities?



In this year's survey, just over half of respondents had an internal innovation or tech committee. This is a meaningful change from last year, when only 41% of respondents had them. These findings indicate growing engagement and increased structure around the decision-making process for new technology adoption.

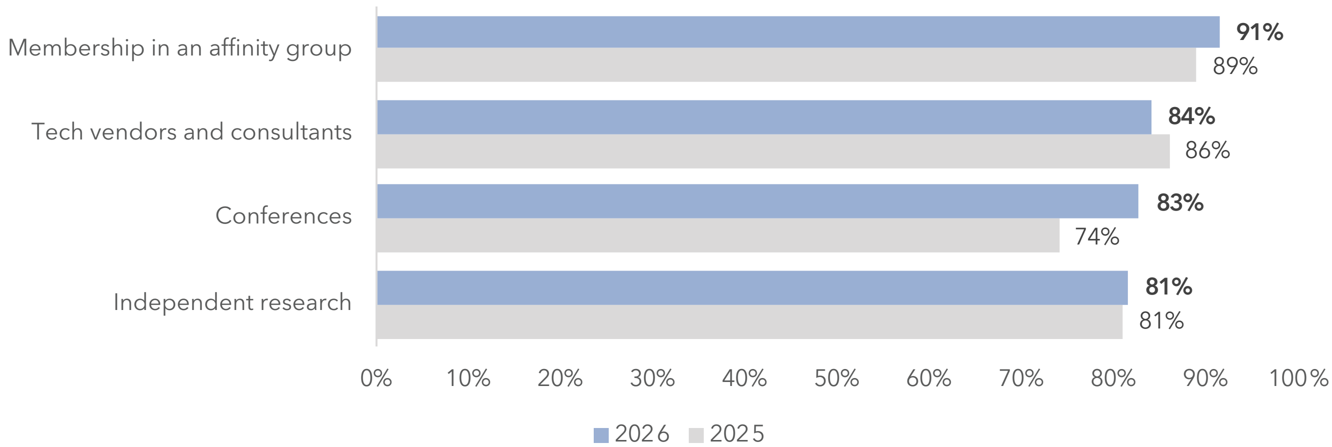
The makeup of these committees is becoming more directly focused on staff. In both the 2025 and 2026 *CTO Hotline* surveys, respondents were asked whether they included staff, residents, and third-party experts in their tech committees. In each case, including staff on these committees was virtually universal (in line with our findings in **5.03 Expectations**, the staff involved in these committees should be intentionally curated to include both those who are somewhat resistant to technology and those who are excited about it, to increase buy-in early in the technology adoption cycle), but participation by residents and third-party experts dropped year-over-year.



It may be that third-party experts and residents continue to have a presence in technology decision-making, but without formal membership on a tech committee. Including these participants in discussions can be beneficial, as outside experts can dispel group-think and resident representatives can directly communicate rapidly evolving expectations (see **5.03 Expectations**).

6.02 Sources of Reliable Technology Information

What sources do you use for reliable information about information technology?
(Select all that apply)



Once organizations decide to pursue a new technological priority, they must find reliable information about vendors, best practices, and risks. The *CTO Hotline* asked respondents, "What sources do you use for reliable information about information technology?" and offered four answers, from which respondents could select any and all that applied to their organization.

As was the case in 2025, membership in affinity groups, like LeadingAge and Ziegler Link•age Funds, was the highest-rated source of information, followed by technology vendors and consultants (e.g., NuAIg).

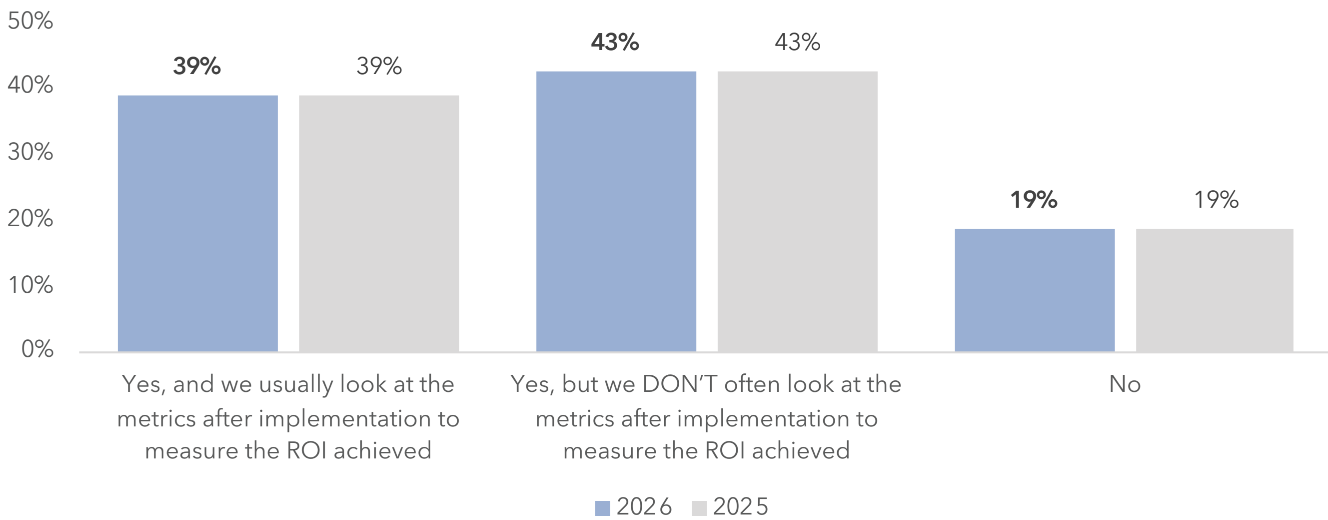
Independent research stayed steady at 81% in both 2025 and 2026, but conferences jumped in popularity, from 74% in 2025 to 83% this year. This information can be useful for conference organizers and exhibitors as they evaluate the best ways to reach their target audiences.

6.03 Measuring Technology 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."*

This was the full contents of the 2025 *CTO Hotline* section "Measuring Technology Success." The same could be said this year. The results between 2025 and 2026 showed no change, down to the percentage.

When you implement new technology solutions, do you set metrics for success?

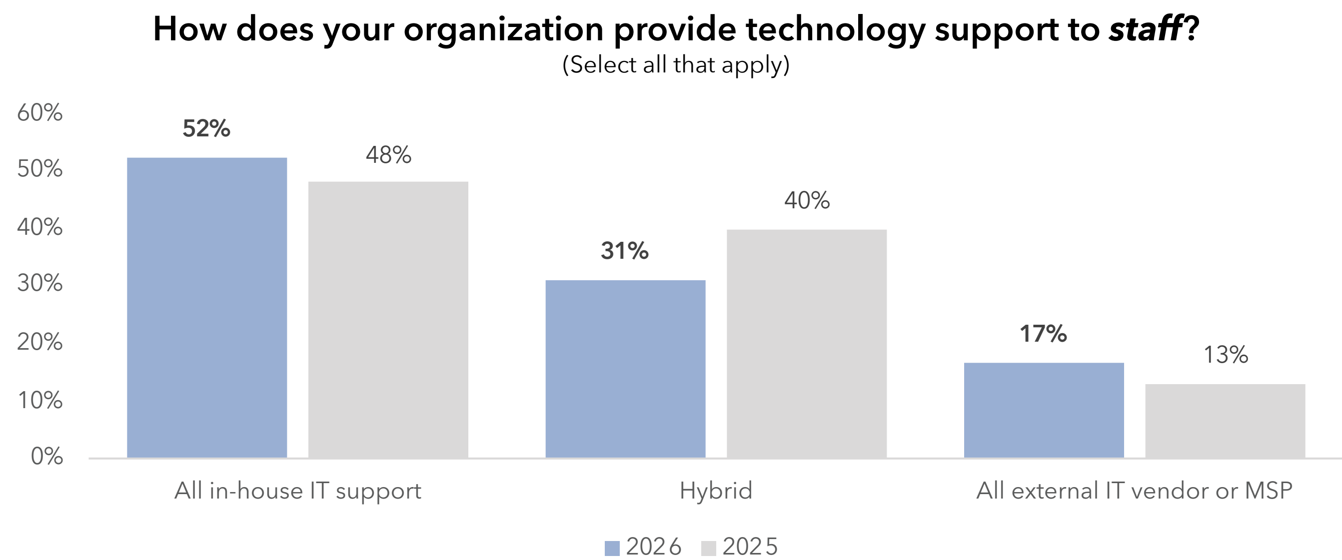


Failing to quantitatively measure technology success is a lost opportunity on numerous fronts. Not only do these measurements assist in evaluating whether certain solutions are working as intended, but the practice of taking these measurements into account allows managers to demonstrate data-driven leadership for their teams. These decision-making habits trickle down into the expectations and culture of the rest of the organization.

6.04 Tech Support

As organizations become more technologically advanced, tech support needs arise. This is especially true in organizations that are successful in bringing reticent team members along on the technology journey: when tech support is easy to access, quick to respond, and positive, even the most resistant employees can come to find the value in new technology.

Staff tech support is generally provided with at least some in-house team members, and often with support from external IT vendors and managed service providers (MSPs). The single most common model is to use entirely in-house tech support, with 52% of respondents reporting using this structure.

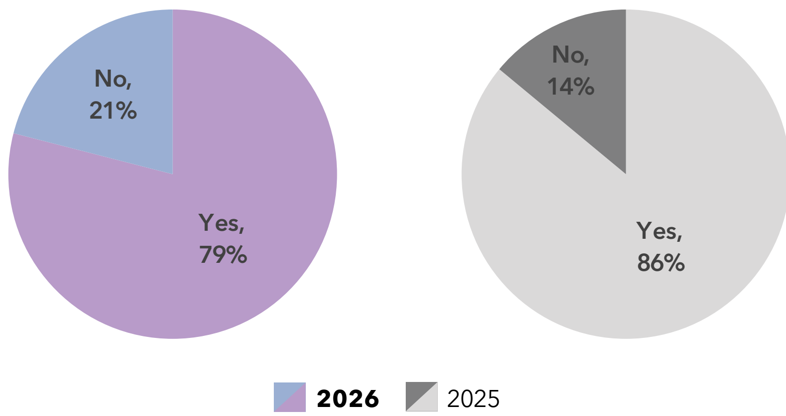


This is not vastly different from the prior-year data, although there is a slight shift away from hybrid models toward entirely in-house tech support.

As explored in **5.03 Expectations**, staff are not the only stakeholders seeking tech support from senior living and care providers. Residents, too, want their community staff to ***"help gain confidence in using rapidly developing technologies,"*** as one respondent reported. One respondent said their community has a dedicated Resident Tech Specialist on staff, who is among the most popular team members in their building.

Not all communities have developed structured, formal tech support for residents. Many comments in the survey reflected this function being ad-hoc, with staff doing their best to stay on top of resident tech questions and "techy" residents helping their friends. In fact, formalized tech support for residents has become less common in the past year, according to the *CTO Hotline* data.

Does your organization provide technology support for ***residents***?

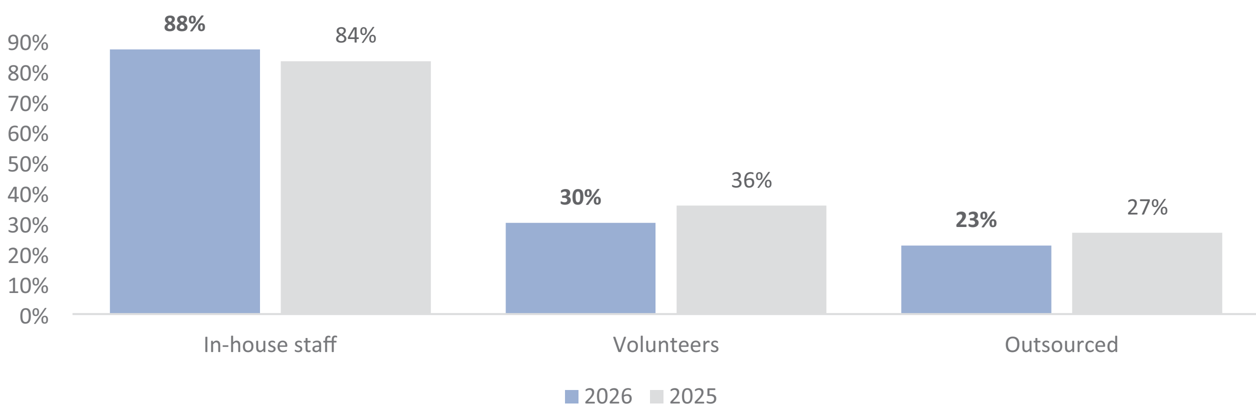


Given the growing expectations residents have for the support, we are surprised to see formal resident tech support falling.

As with staff tech support, resident tech support can be delivered through multiple resources.

How does your organization provide technology support to ***residents***?

(Select all that apply. Only includes respondents who provide resident tech support)



In-house staff, such as IT or activities team members, deliver the majority of resident tech support. Volunteers, both resident volunteers and volunteers coming in from outside of the community, and outsourced tech support and training companies (e.g., The Smarter Service) are less common, but still very meaningful engines to deliver this kind of support. While formal tech support for residents has become less common across the board since 2025, the relative popularity of different delivery methods remains roughly the same.

Section 7
Key Comments

The 2026 *CTO Hotline* gave respondents the opportunity to share a final closing thought before finishing their surveys. We collected a few of these, as well as others from the survey, which appear to capture the sentiment among not-for-profit life plan communities when it comes to technology. You saw a few of these earlier in the report, but we believe they are worthy of inclusion in this summary.

"We have a new organizational Strategic Plan. More than one pillar includes tech-based strategies. This is a first, and really reflects an ever-increasing awareness that technology is (or will be) inherently woven into everything we do."

◆

"The technology industry will be going through disruption and changes similar if not exceeding the Industrial Revolution over the next 5 years. I am excited for the opportunities but concerned about the surprises."

◆

"We have big changes coming and one concern is layering on recurring costs to operational budgets which are already under pressure."

◆

"Constant change and forced upgrades create a chaotic work environment."

◆

"We need to introduce solutions based on need and not force-feed new workplace tools from our ivory tower at the leadership level."

◆

"Technology-focused back of the house. Human-centered front of the house."