



# **2023**

## **YEAR IN REVIEW**



Dear Friends,

As 2023 draws to a close, we want to thank our entire LeadingAge Massachusetts community for your individual and collective efforts to enhance the lives of older adults in the Commonwealth. While the public health emergency is now in our rearview mirror, our members are still coping with the effects wrought by the pandemic; these include a hit to the public image of aging services, substantially increased expenses and of course, unprecedented workforce shortages. Despite these enormous challenges, we are awed by the resiliency of our members. You continue to show up for those you serve, each and every day, focusing on what matters most. LeadingAge MA is proud to stand by your side, providing you with tools and resources to meet your day-to-day challenges, while also supporting you with the knowledge and analysis to think strategically about the future.

We hope that you will take some time to read our Year in Review, highlighting our collective work from this past year. We would like to thank the strong leadership and commitment of our Board of Trustees, who have set out a bold vision and exciting Strategic Plan to help get us there. We also want to thank the small, but very talented and dedicated staff, Vice President, Sarah Lacasse and Membership Coordinator, Jeanmarie Roberts, for all they do on behalf of our members. While we are extremely proud of what we have accomplished together this past year, we know there is much more work that lies ahead.

Once again, we thank you for all that you bring to your organization, to the LeadingAge MA community and to the older adults of the Commonwealth. We look forward to our work ahead.

With gratitude,  
**Elissa Sherman**  
President

**Walter Ramos**  
Board Chair

# Our Growing Member Community

In 2023, we were pleased to welcome **8 new Provider Member Organizations** and **17 Business Affiliates** into our membership of collaborative, respected, forward-thinking organizations focused on meeting the needs of older adults.

Representing the spectrum of aging services providers, these new members include two life plan communities, five skilled nursing facilities, and a life plan at home provider. Our growing member base is testament to the power of membership and the work we can accomplish with our collective voices.

**In 2023 we welcomed the following new provider member organizations into the LeadingAge Massachusetts community:**

- Alliance Health at Maples
- Kendal at Home
- Lutheran Rehabilitation & Skilled Care Center
- Marian Manor
- Mount Carmel Care Center
- Stone Rehabilitation & Senior Living
- The Commons in Lincoln
- The Villages at Duxbury





# Demonstrating the Value of Membership

More than 30% of our membership responded to our biennial Membership Survey which sought to understand the short- and long-term concerns of members, as well as perceptions of membership and the Association. Consistent with our responses from our 2020 survey:

- Members reported strong satisfaction with the Association's provision of **relevant education and information, networking opportunities** and **value for dues paid**.
- Members reported **extremely high rates of satisfaction with staff responsiveness**, indicating that LeadingAge MA is effective in helping members prepare for change.
- On a scale from 1 (dissatisfied) to 10 (very satisfied), the average rating for **overall satisfaction with the Association was 9.37 up from 9.34 in 2020**.
- Members highly valued **weekly email communications** that provide **timely policy updates** and crucial **information on changes in the field**.

Our knowledge management tools, including the **LeadingAge 5 Star Analysis Reports** continue to receive high praise from Nursing Home members who value the customized and detailed information provided. Several member organizations have taken advantage of **LeadingAge 5 Star Consultation services** offered to LeadingAge MA members through our partnership with LeadingAge NY.

LeadingAge MA offered a wide variety of **highly-rated virtual educational opportunities** throughout the year. In conjunction with our New England LeadingAge state partners eleven aging services managers completed the **Leading With Confidence** virtual management course. These managers gained clear, practical, and engaging skills that will aid them in their day-to-day work. LeadingAge VA welcomed our member organizations' senior leaders and Board members to a **series focused on the hottest topics related to governance**.

In response to member feedback on the workforce crisis, LeadingAge MA embarked on a partnership with **Cinematic Health**. This collaboration provides the opportunity for our members to access the ReadyCNA training program at exclusive discounted rates. **ReadyCNA is a purpose built, comprehensive online didactic training program designed to prepare individuals for careers as CNAs**. The program's unique storytelling format promotes learner engagement, knowledge retention, and a realistic, day-to-day depiction of the challenges and rewards of working in a long-term care community. We are thrilled to be continuing this partnership into 2024!



# Our Strategic Plan

**LeadingAge Massachusetts' 2023-2025 Strategic Plan embodies a comprehensive approach focused on three pivotal areas:**



**Strengthening our Aging Services Workforce**



**Resetting the Public Narrative on Aging Services**



**Better Supporting our Consumers**

**In alignment with this plan, we are focused on...**

- Immediate support strategies amid the current workforce crises and long-term solutions for future sustainability. Our efforts involve promoting inclusive work environments, developing a robust HR network, and working to provide high-quality workforce resources.
- Reshaping public perception, especially post-COVID-19 pandemic, by promoting a positive narrative and encouraging member participation in awareness-building endeavors.
- Helping members understand and better cater to consumer needs by advocating for inclusive and high-quality care, gathering consumer insights, and sharing best practices among members.

**In 2023 we made strides towards each of our strategic goals through collaborative action with members, community stakeholders, policy makers and partners. In the pages below you can read about our collective work during 2023.**

# Advocacy

Much of our advocacy efforts this past year centered on **policies needed to strengthen our aging services workforce**. We engaged with members of the state legislature to advance policies to build up our workforce. We are very pleased that our advocacy efforts resulted in important provisions including **funding for new CNAs, career pathways, supervisory training and allowing for Medication Technicians** as part of omnibus nursing home legislation that passed the House of Representatives. During visits with members of the Massachusetts Congressional Delegation and through written comments, we also spent a significant amount of time **raising concerns with CMS' misguided proposed staffing rule for nursing facilities** that does not take into consideration the significant workforce shortages that exist here in Massachusetts and around the country.

LeadingAge Massachusetts' advocacy efforts were instrumental in advancing two important **consumer-focused policies**:

- The House-passed nursing home omnibus legislation included a provision aimed at **making it easier to develop and operate small house nursing homes**, a model that we know to be preferred by consumers and that many of our members have sought to build
- LeadingAge MA has taken the lead to **advance LTSS Financing reform**, aimed at helping consumers pay for needed long term services and supports. Our advocacy efforts led to **securing funding in the FY24 budget for an actuarial study** designed to understand costs and benefits of different financing models, a first step needed before advancing specific policy solutions





# Diversity, Equity & Inclusion

LeadingAge MA began new work in 2023 to support our members in embracing and implementing DE&I strategies within their organizations. Our initiatives aim to provide **practical, actionable steps designed to support our members** in creating **inclusive cultures** within their communities. We began this work by

- Convening a **DE&I workgroup** to advise and support Association efforts
- Launching an initial survey to assess member activities and needs related to DE&I
- Building **education sessions** into our Annual Conference including a session with Marvell Adams on the Personal Journey to Inclusion and a member-led panel discussion
- Compiling **online resources** for members which can be found at [www.leadingagemma.org/dei](http://www.leadingagemma.org/dei)
- In December we convened our first **DE&I Peer Group** meeting which welcomed members from across provider types and job functions to join a conversation about advancing DE&I efforts within their organizations

We firmly believe that by supporting our members in their DE&I journey, we collectively build stronger, more vibrant communities that champion diversity, ensure equity, and foster an environment where every individual feels respected and valued.

**Thank you to our Diversity, Equity & Inclusion Workgroup for their support and their commitment to this important work.**

**Zehra Abid-Wood**, Lasell Village

**Sheena Brien**, Newbury Court

**Candace Cramer**, Goddard House Assisted Living

**Chuck Crush**, New England Homes for the Deaf

**Emily Levine**, 2Life Communities

**Kim Pratt**, Brookhaven at Lexington

**Aline Russotto**, Orchard Cove

**Philippe Saad**, DiMella Shaffer



# Community Building & Shared Learning

At its core, LeadingAge MA is a community of **strong, mission driven organizations and the professionals who run them**. Opportunities for connection and peer-learning are a key benefit of membership and highlight the collegial spirit of the Association. In 2023 LeadingAge MA held virtual Peer Group Meetings for professionals in:

- **Assisted Living Residences**
- **Life Plan Communities**
- **Rest Homes**
- **Affordable Housing**
- **Nursing Home Administrators**

Representatives from more than 60 member organizations attended one or more of these meetings where members **shared policies, best practices and ideas on a range of operational and strategic questions**.

Consistent with our strategic priority to strengthen the aging services workforce, our **Human Resources (HR) peer group** has grown in size and strength. During the past year, we were thrilled to welcome **professionals from 38 different member organizations** where participants dedicated time to learn from and support each other. In addition to sharing ideas, experiences and policies, the HR Peer Group welcomed Jenna Kellerman, VP of Workforce Development at LeadingAge who shared resources developed by LeadingAge exclusively for members. This group has also taken advantage of a **new listserv developed for member use between meetings**.

Thank you to **Leah Lopes of Sherrill House and Kim Pratt of Brookhaven at Lexington** for their leadership of the HR Peer Group! We look forward to growing this network in 2024!



# The 69th Annual Meeting of the Membership

Collegiality and the strength of the LeadingAge MA community was fully evident at the 69th Annual Meeting of the Membership, which was held at the **College of the Holy Cross in Worcester, MA, on October 11, 2023**. The event served as a heartfelt tribute to the LeadingAge MA community, recognizing exceptional individuals and programs across member organizations. The evening's highlight was the **Achievement Awards Ceremony, honoring outstanding contributions within the community**.

The event also featured the election of **new officers and trustees**, naming **Walter Ramos of Rogerson Communities as the new Board Chair** and welcoming **Felix Rosenwasser of Fox Hill Village to the Board**, in addition to the celebration of **Elissa Sherman's 25 years with the Association**. The overwhelming success of the event can be attributed to the support of sponsors, partners, committee members, and attendees, exemplifying our collective dedication to shaping a brighter future for aging services. **LeadingAge MA extends gratitude to all contributors and heartfelt congratulations to our award winners.**



# 2023 Annual Achievement Award Winners

**Emerging Leader Award**  
Alessio Miniello, Sherrill House

**Heart & Hands Award**  
Jovana Cora, Hale House

**Volunteer of the Year Award**  
Vigil Volunteers, Carleton-Willard Village

**Workplace Excellence Award**  
Notre Dame Health Care

**Program Innovation Award**  
The Outward Bound Program- Legacy Lifecare  
The Commons Residence - Orchard Cove

**LeadingAge MA Exemplary Service Award**  
Kim Pratt, Brookhaven at Lexington

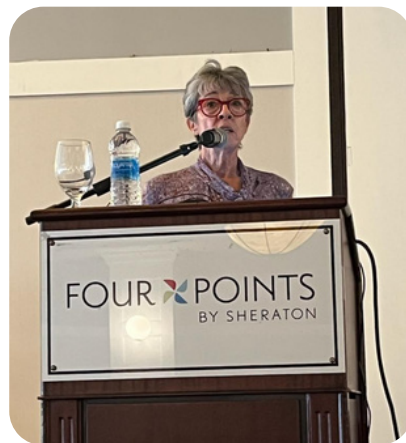




# Senior Living Symposium

More than **200 professionals attended the 2023 Annual Senior Living Symposium**, which was developed in cooperation with Platinum Partner, Ziegler, for the 15th year. In keeping with tradition, the agenda included high-level education designed to engage participants in thinking strategically about the future of their organizations. Highlights included the always-anticipated session on the **current state of senior living offered by Ziegler staff**, an instructive take on the **state of healthcare from the hospital perspective**, a look at how **DE&I efforts impact workplace culture**, and an examination of how **demographics and the state's economy is contributing to the workforce crisis**. Capping off the day was an engaging **CEO panel discussion** on how organizations can think strategically about growth led by Keith Robertson of Ziegler.

LeadingAge MA is immensely grateful to our Partners at Ziegler for their ongoing support and their dedication to bringing members impactful education.



# Annual Conference & Exhibition

The **2023 LeadingAge MA Annual Conference and Expo** was a remarkable success, uniting aging services professionals on June 7th for a day filled with **insightful sessions, expert knowledge sharing, and vibrant discussions.**

Attendees were immersed in a diverse array of topics, including:

- a general session on the Personal Journey to Inclusion,
- a panel discussion on DE&I efforts in member communities,
- breakout sessions covering topics ranging from workforce strategy to dementia-friendly design.

We are grateful to the speakers and panelists who enriched the event with their insight and expertise. Our exhibitors also played a crucial role while showcasing innovative products and solutions. The active participation by attendees fostered a dynamic atmosphere and fruitful networking opportunities.







The **re-launch of the LeadingAge MA Leadership Academy** in September marked a transformative milestone. Under the guidance of our **new instructor Steve Colwell**, the program drew **a record number of applications** resulting in a new class of **24 emerging leaders within the membership**. The academy utilizes a comprehensive curriculum designed to cultivate leadership skills, strategic thinking, and personal development. We want to thank our dedicated Leadership Development Committee for their work over the past two years to help us re-launch the Academy:

**CHAIR- Matthew Hollingshead**, NewBridge on the Charles  
**Cherie Metcalf**, Hannah B.G. Shaw Home  
**Lori Ferrante**, Elizabeth Seton Residence  
**David Raider**, Hebrew SeniorLife  
**Stephanie Williams**, Linden Ponds  
**Kim Pratt**, Brookhaven at Lexington  
**Colleen Morrissey**, Somerville-Cambridge Elder Services  
**Sean Morrison**, CLA

**LeadingAge MA thanks CLA for their unwavering support as the exclusive sponsor of the LeadingAge MA Leadership Academy.**



# Our Leadership

## OFFICERS

**Chair- Walter Ramos**, Rogerson Communities

**Immediate Past Chair- Nicole Breslin**, Campion Center

**Chair -elect- Margaret Manton**, The Loomis Communities

**Treasurer- James Freehling**, Brookhaven at Lexington

**Clerk- Matthew Hollingshead**, Newbridge on the Charles

**President- Elissa Sherman**, LeadingAge Massachusetts

## TRUSTEES

**Marianne Delorey**, Colony Retirement Community

**Betsy Mullen**, Legacy Lifecare

**Patrick Stapleton**, Sherrill House

**Joe Frias**, North Hill

**Michael Ferrick**, D'Youville Life & Wellness Communities

**Charles Crush**, New England Homes for the Deaf

**Felix Rosenwasser**, Fox Hill Village

Thank you to **Nicole Breslin of Campion Center** for service as Board Chair over the past two years and for leading the Association with vision and commitment.

We also thank outgoing 2023 Board Members **Aline Russotto of Orchard Cove** and **Anne Thomas formerly of Glenmeadow** for their leadership, commitment and comradery!



# Our Leadership Committees

**LeadingAge MA extends heartfelt gratitude to the volunteers that comprise our Finance Committee and our Committee on Trustees. Thank you for your support and guidance!**

## **FINANCE COMMITTEE**

**Kristine Donnelly**, Hannah B.G. Shaw Home

**James Freehling**, Brookhaven at Lexington

**Lisa Kubiak**, Mary Ann Morse Healthcare Corp.

**Jeffrey Landa**, Legacy Lifecare

**Margaret Mantoni**, The Loomis Communities

**Alan Popp**, Mason Wright Communities

**Aline Russotto**, Orchard Cove

**Walter Ramos**, Rogerson Communities

**Jered Stewart**, Bethany Communities

## **COMMITTEE ON TRUSTEES**

**Nicole Breslin**, Campion Center

**Jim Freehling**, Brookhaven at Lexington

**Walter Ramos**, Rogerson Communities

**Aline Russotto**, Orchard Cove

**Chris Sintros**, Deaconess Abundant Life Communities

**Jered Stewart**, Bethany Communities

**Naomi Prendergast**, The Carmelite System



# Business Affiliates & Partners

LeadingAge MA is supported by over 85 Business Affiliates and Partners who offer innovative solutions geared towards our provider members' needs. We are so grateful for their ongoing support. Please visit our 2022 Business Affiliate Guide to learn about the work of these companies.

**We extend a special thank you to our Business Partners for their generous contributions to the work of the Association.**

## Platinum Partners



CAPITAL :: INVESTMENTS :: ADVICE



## Gold Partners

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## **STAFF**

**Elissa Sherman, President**

**Sarah Lacasse, Vice President**

**Jeanmarie Roberts, Membership Coordinator**

**Pete Thompson, Accountant**



### **LEADINGAGE MASSACHUSETTS**

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