



Top 2021 Trends That Will Transform Senior Living

A close-up photograph of a woman with dark, curly hair, wearing blue medical scrubs and a stethoscope. She is smiling warmly, looking slightly to her left. The background is softly blurred, showing what appears to be a clinical or hospital setting with warm lighting.

Overview

Last year witnessed the continuation of several major trends as well as the emergence of important new ones, born in response to unique challenges the COVID-19 pandemic posed upon all organizations, especially senior living and long-term care facilities. Amid immense challenge and tragedy, new technologies and innovations arose to better protect and care for residents in senior care facilities.

While the virus continues to ravage communities across the country, new vaccines and digital transformation initiatives offer hope and tangible benefits to the beleaguered industry.

Conclusions

- Most trends point to digital transformation as the answer to the most pressing challenges facing the senior living industry in 2021.
- While navigating downward pressure on length of stay and profit margins, facility operators are finding new ways to cut costs without compromising resident care or the employee experience.
- Digital transformation via workforce management is the key to streamlining scheduling and solving staffing challenges, as well as achieving safety and operational efficiencies in a post-COVID economy.
- Crafting a total workforce management vision will require a culture of continuous talent management. Leaders must assess future business requirements and the growing need for digital skill sets that support their investment in technology.
- Compliance has become much more difficult to achieve without automation due to changing government policy and practices in response to COVID-19.

Senior Living Snapshot

Going into 2020, total market capitalization for senior housing and care was estimated at \$475 billion. COVID-19 changed everything. Looking back, 2020 will undoubtedly be remembered as a bleak period that exposed vulnerabilities in operating models as the industry battled COVID-19 and faced intense industry scrutiny and fluctuating regulations. Industry players understand all too well that it was a difficult year of historic proportions.

Even before the COVID pandemic, healthcare leaders had concerns about the future of the long-term care industry. The aging baby boomer population combined with a shortage of trained staff looked like a recipe for disaster. Add these factors to the vulnerability of long-term care organizations and residents to a highly contagious COVID-19 virus and you'll see a looming healthcare crisis developing.

Like any industry, trends come and go. But for post-acute care and senior living facilities to thrive after COVID-19 dissipates, operators must understand the evolving landscape, and stay flexible, so they can adapt to all ongoing changes. They must also continually pursue strategies and technologies that will help them meet future challenges.

These changes are making normal operations harder with many senior living and skilled nursing facilities struggling to fill open positions. Staffing shortages will continue in 2021. In addition, recent developments could significantly alter the skilled nursing landscape.

Meanwhile the needs intensify. Aging adults are straining the overtaxed system as they seek care for various stages of healthcare needs. Meanwhile the growing complexity of government regulations and oversight creates challenges from a care and compliance perspective. In addition, the ongoing shortage of both higher-skilled professionals and minimum wage workers worsens.

2021 is the year to differentiate senior living facilities in the marketplace and invest in improving everything, from safety to amenities to quality public spaces and use of technology.

THINK

- Better and friendlier service
- Higher quality of accommodation and care
- More spaces to alleviate depression and improve socialization
- Smart Watches & Mobile Devices
- Well-synchronized staffing to monitor residents' health and track movement of residents
- More partnerships with related service providers

These account for just a few of senior living trends and challenges we expect to see in 2021. The bottom line is senior care organizations that strive to provide a great service and effectively market their community effectively will be able to benefit from the changes ahead.

2021: The Year of HCM Technology Transformation

In parallel, technology-led HR trends promise to make a significant impact on skilled nursing staff and senior living communities. Human capital management (HCM) and workforce management organizations worldwide are responding to pandemic disruption and recovery by evaluating and deploying continuous HR processes. IT leaders are working with HR to help transform HCM must prioritize investments in workforce management and planning, contingent labor tools and learning to meet stakeholder expectations.

- Organizations are increasingly deploying continuous detection, track and trace, and risk mitigation processes to minimize the organizational and health impacts of COVID-19.
- The increased need for business agility during pandemic response and recovery has shifted business planning cycles for many organizations from years to quarters, or even months.
- Contingent labor usage is increasing across most enterprises due to their need to quickly address availability and skills gaps without the resources, risk, and commitment associated with hiring full-time positions.
- Employee-focused performance, coaching, engagement, learning and development processes are evolving to support more informal and fluid interactions.
- HCM technology leaders need to assess the strategic workforce planning capabilities of point solutions and consultancies, along with those delivered by their existing HCM suite. Prioritize open architecture and integration features, as it may be necessary to combine various solutions (particularly early on) to fully meet requirements.
- IT leaders should work with HR, procurement and operations leaders to determine ownership of contingent labor strategy and craft a vision for total workforce management. Evaluate any necessary solutions for the vendor's vision for supporting a composable applications architecture.
- Leaders must assess the future needs of the business and desired employee skill sets and begin investing in experiential learning tools. Embed learning assets in an employee's daily activities to maximize knowledge retention.

Cost Reduction/Efficiency

Embracing New Technology

Considering these future trends, it is imperative senior care organizations embrace web-based tools to enhance recruiting and retention efforts, track and manage staffing and scheduling, and synchronize workflow effectively and cost efficiently. Technology is also essential for achieving compliance in a highly regulated industry amid mounting complexity due to the ongoing pandemic.

PREDICTION

Technology will accelerate. Skilled care is doing more than shifting from high-touch to high-tech. It is embracing tech tools in every conceivable way. That trend will also grow exponentially.

Trend: Operation Warp-Speed Technology

Technology is moving at warp speed in all areas of our world, from consumer technology to medical advancements, to artificial intelligence. These advancements are significantly impacting technological innovation in senior health care and won't slow down anytime soon.

COVID-19 has accelerated technological innovations. – Operation Warp Speed delivered effective vaccines in 11 months, a startling improvement over the years—to-decades it took to develop vaccines for Polio, Influenza and more recently SARS COVID-2.

While virtual care technologies have made tremendous strides, senior care will always be, in some form, person-to-person care and never be fully replaced by artificial intelligence, robotics, or software.

However, from both an operator and consumer perspective, technology is changing the way we manage and deliver senior care. Operational technology is empowering providers to predict the needs of residents like never before, from environmental monitoring of patient movement and changes to data-driven clinical monitoring. In addition, providers can now monitor and track care provision in real time to improve care outcomes and reduce risk.

For residents, these developments will enable them to live more independently with technology supporting aging-in-place in ways not possible even five years ago. Patients can receive comprehensive monitoring and support in a more independent care model. Technology can also support the core of senior care, which is person-to-person, by assigning limited human resources to where they are most needed, when they are needed, and by performing the most important tasks.

The move by health care organizations toward technology implementation accelerated during the pandemic as technology became critical for delivering quality care, communication, and integration. Providers discovered new ways to use technology to communicate with residents' families and loved ones as well as use telemedicine to collaborate on care while reducing COVID-19 exposure. Providers and families who were initially apprehensive have adapted to the new reality and risen to the challenge of remote care and communication. The funding waivers and technology grants, partnered with the warm reception of these technologies by staff, residents, and families, means this progress is here to stay. Although some practices may change when in-person visits resume, it seems certain facilities will continue to expand its use of technology for care collaboration.

The Need for Low and Middle-Income Senior Living Is Increasing

Baby boomers are aging, which means that in the next decade, the USA will see a sharp increase of people over age 75 in middle and low-income brackets. The senior living industry must adjust and provide new solutions to serve large numbers of seniors with limited financial resources.

The increase of low-income older adults projected to need comprehensive care will also impact state and federal budgets and create new challenges for all organizations that seek to help seniors maintain a high quality of life in their communities.

Assisted living facilities, continuing care and all senior living communities will need to develop new ways to deliver more affordable care to these seniors.

SOLUTIONS CAN INCLUDE:

- New and improved affordable care models.
- Revised expectations of return for services aimed at middle-income seniors.
- New partnership opportunities.
- New ways to leverage technology to increase efficiency.

Profit margins face downward pressure. Skilled nursing facility (SNF) operators are on average in a break-even business. The median net profit margin for 2018-19 was just a quarter of 1% while many spiraled into the red during the pandemic.

Occupancy and length of stay are declining. Despite our aging society, senior living facility (SLF) and long-

term care occupancy rates continue to decline, with the national average falling to around 78%. More seniors are using home health services to prolong their stay at home before shifting to independent or assisted living. Lengths of stay are also on a downward path, with current data showing an average of 143 days compared to previous studies that measured stays in years. This combination of low occupancy and high turnover puts a premium on operators' ability to touch more people to keep their buildings full and to stay on top of the growing complexity of their operations. This pressure also makes it even more important to improve business operations, such as marketing to both residents and prospective employees and making operations more cost efficient.



Simplifying Scheduling

PREDICTION

With the complications of a multi-generational workforce, COVID-19 protocols, new staff, and regulations, simplifying scheduling is critical.

Better Workplace Culture

As part of their mission to provide the best care for patients, senior living operators are realizing the importance of caring for caregivers. During the pandemic, this means safeguarding the health of staff as they care for sick patients. It also involves building a workplace culture that empowers staff to do their jobs

effectively and efficiently and enables them to achieve their performance objectives.

In practical ways, this also means providing technology tools that use real-time data and integrate with other applications to provide a holistic view of the facility's operations and optimize workflow.

Enhanced Practice Flexibility

Operators were significantly impacted as the Coronavirus shifted from a regional issue to a worldwide pandemic. Senior living facilities suddenly faced performance and partnership challenges as necessary supplies and skilled staff became in short supply, even as demand for top-quality care rapidly increased.

Although new vendors and best practices designed to help stabilize supply issues, senior care facilities still face operational challenges that demand they become more flexible. Deliberate flexibility has emerged as one of the pillars for a strong foundation for SLF success amid the ongoing pandemic and lack of certainty on the arrival of herd immunity.

Improved Process Functionality

While familiar processes and legacy tools sufficed in meeting minimum care standards and empowering staff to complete key tasks during COVID-19, many long-term care facilities closed temporarily or permanently when care and financial challenges proved too overwhelming. To increase overall agility, post-acute care, skilled nursing, and senior living facilities must prepare for rapid process pivots by identifying key areas of concern, prioritizing care-based value, and reducing total complexity of operations.

Meeting Staffing Challenges

Staff shortages and turnover remain a major issue across skilled nursing and senior living industries. With healthcare unemployment rates hovering around 2%, senior care communities are finding it harder than ever to hire qualified and trustworthy care staff. Stricter immigration controls, rising rates per hour, and fierce competition add to the problem.

Workplace culture presents additional challenges to senior living and long-term care communities as they must navigate the needs of five generations in the workforces, from the silent generation to Generation Z. Different employee views and expectations can be difficult to manage. That's why communities must offer flexibility and advancements, as well as utilize social media to connect with the right audience and build awareness.

Retaining employees requires enhancing your company culture and better engaging employees. Schedule flexibility and anywhere/anytime access to key are essential to building retention.

Reducing Staff Turnover

PREDICTION

Staffing demands will stiffen. Finding and keeping workers is arguably the biggest long-term challenge the industry faces.

Addressing Staff Shortages

Of course, the biggest issue in 2021—next to COVID-19—is the same issue plaguing the senior care

industry for more than two decades: a shrinking talent pool of trained staff to care for a growing population that will need more specialized care.

Nearly 10,000 Americans turn 65 years old each day with life expectancy increasing 2.5 years every decade. At this rate, the senior population is expected to double by 2030. As a result, senior living and long-term care facilities must find new and more effective ways to recruit and retain staff. This means increasing salaries and benefits, finding new markets from which to recruit workers, and embracing new technology to assist staffing and resident care.

Cultivating a Healthier Work Environment

As part of their mission to provide the best possible resident care, senior living facilities are realizing the importance of caring for caregivers. During this pandemic, this means first safeguarding the health of staff as they care for residents, especially sick residents. It also involves building a workplace culture that empowers staff, rewards their efforts, and provides clear guidance and support to help them grow in their careers.

In practical ways, this also means providing benefits like flexible, transparent scheduling, childcare, and concierge services to help employees maintain a healthy work-life balance. It also means providing the tools to simplify work and improve the employee experience every day. Workforce management technology gives employers more control over their workflow while ensuring the right staff are in the right place at the right time to achieve operational success.

Focusing on Person-Centered Care

One of the current long-term trends is a focus on resident satisfaction as well as clinical outcomes. Care providers are taking resident preferences into account when they plan therapy and care programs. Ultimately,

the goal of person-centered care in long-term care is keeping seniors independent as long as possible, while supporting their dignity and individual choices.

This new focus will encompass a cultural change that begins at the top of the senior living organization, empowers staff and involves them empowers and involves nurses and other staff in the decision-making process. The focus on person-centered care begins when staff become more engaged and feel a greater sense of ownership in the level of care the facility provides. Employee engagement can be further enhanced with mobile, real-time feedback applications that are user-friendly and reflect the way society functions today.

Today, senior care has a record number of open positions and turnover rates that range from 40% to 75%. The escalating need forces employers to compete for talent and find creative ways to improve the employee experience while containing costs through better staff utilization and providing low-cost health coverage to part-time or temporary employees.

Building Proactive Practitioner Frameworks

Skilled nursing practitioners are in demand as post-acute and long-term care facilities strive to bolster expertise and improve patient outcomes. This need is largely driven by compliance and reputational concerns. With over 40% of all COVID-19 deaths in the U.S. linked to senior facilities, public scrutiny and regulatory oversight are rising.

Developing proactive practitioner frameworks can help prepare them for post-pandemic staffing demands, address compliance concerns around facility management and adapt to highly synchronized workforce management solutions that reduce costs while improving scheduling, teamwork, and workflow.

Trend: Momentous Workforce Difficulties

Prior to the pandemic, unemployment rates reached a 50-year low nationally, and fell even lower in health care. In addition, nearly 21 million new jobs had been created since 2010, leading to one of the tightest labor markets in decades. More stringent immigration controls and the retirement of millions of baby boomers each year resulted in an even more constricted labor supply. To gain a competitive advantage, providers had to rethink the employee experience, find ways to enhance it, and leverage them to attract candidates.

Technology can also help address staff shortages by making senior care facilities more attractive places to work. Research indicates turnover rates in assisted living facilities hover around 30 percent (more than double turnover rates for bedside registered nurses in hospitals), and 20 percent of senior care employees cited insufficient technology as a factor in employee burnout.

The workforce shortage has become a growing crisis in health care. Strategic thinking and an effective recruitment campaign are critical for attracting, motivating, and retaining talent while developing a strong brand is essential in a highly competitive marketplace.

Conversely, lack of a strong brand or culture can hamper recruitment and retention efforts. Businesses must make their offering more attractive than their competitors—and not just in terms of financial compensation. Management must relate to their candidates, consider the characteristics of their employees, and build a culture conducive to those interests. Doing so will enhance the company's image and improve employee retention.

Employee engagement became even more important as organizations realized how critical a well-trained and dedicated workforce is to their success during the COVID-19 outbreak. Strong employee relationships promoted open communication about training, testing, emotional challenges, and staffing during COVID-19. Operators found creative ways to reward health care heroes, including new pay and bonus structures, benefits like childcare and meals, and ongoing encouragement.

They are also providing employees with state-of-the-art technology including implementing telehealth. Meanwhile Amazon Alexa, Apple's Siri, and Okay, Google are helping staff and residents connect with loved ones and medical professionals.

Solutions that automate caregiver workflows and enhance collaboration can improve staff satisfaction and combat turnover. Therefore technology-enabled campuses are critical—not only to attract younger, tech-savvy workers—but also for driving efficiencies especially in the wake of staffing shortages and overwork stemming from COVID-19.

Adopting Technologies that Save Time and Work

Overcoming staff turnover in senior care calls for automation and timesaving collaboration tools to streamline workflows and improve morale. Implementing solutions, such as smart speakers and secure mobile devices for communications, can positively impact workload management and productivity, giving caregivers more time to provide direct care and enjoy their interactions with residents.

Videoconferencing tools can also help caregiving teams coordinate care and disseminate information to staff across various locations. The virtual communication format enables care teams to meet face to face with a patient's loved ones—a solution

that's proving particularly beneficial during the current public health crisis.

“We’re working hard to ease the concerns of family members by providing them with regular updates and giving them the opportunity to stay engaged with their loved ones during this unprecedented situation.”

- Tom Gleason, Catholic Health

Upon the pandemic's outbreak in the United States, Catholic Health immediately adopted 20 iPads to enable virtual nursing home visits and keep residents' family members and friends informed of their health and well-being.

Meta-platforms Integrate Disparate Functions

As the number of tools grows, meta-platforms are emerging to pull together different features across multiple systems. SmartLinx is a workforce management platform that works seamlessly across several related, but often disconnected areas, including management, recruitment, payroll, benefits, employee scheduling, time tracking and among others—all neatly integrated and recorded for compliance purposes.

Automated solutions enable care teams to better focus their attention on residents who most need it and proactively respond to potentially serious conditions. These benefits are a welcome and necessary development right now.

Technology can also help address staffing shortages by improving the work culture since turnover rates

in assisted living facilities hover around 30 percent (more than double that of bedside registered nurses in hospital settings), and 20 percent of senior care employees cite insufficient technology as a contributor to employee burnout. Furthermore, 15 percent of healthcare workers saw almost immediate improvements in job satisfaction after implementing an electronic health record (EHR) system.

There's no stopping the trend of an aging U.S. population—or the fact of an increasingly graying healthcare workforce. The only thing healthcare providers can do to mitigate the impact of these trends is to prepare for them. Adopting technologies that improve senior care and make employees more productive is critical. If senior care organizations wait until they're overwhelmed by patient needs and staff shortages to implement new technologies, they'll find themselves scrambling to catch up. The time to act is now.

Continuous Talent Management

PREDICTION

By 2024, 40% of organizations will deploy continuous learning technologies to better support organizational shifts toward real-time performance, feedback, and coaching.

Digital Learning Tools to Upskill Staff and Improve the Employee Experience

During the past few years, organizations have looked to adopt more continuous talent management (TM) processes and technologies. Gartner has watched employee-focused performance, coaching, engagement, learning and development processes evolve to support more informal and fluid interactions. The shift to continuous TM accelerated

as organizations abruptly shifted to pervasive remote working because of COVID-19. Organizations continue to try to improve employee performance and drive productivity. They have embraced more continuous feedback, coaching, development and recognition to better motivate employees and ultimately improve performance. Early adopters have discovered integrated processes are more impactful and can provide more cohesive experiences for both employees and managers. Continuous learning is a critical to support continuous TM. Organizations must provide more opportunities and resources to embed learning content (especially video) and interactive courses.

In contrast, providing feedback or coaching in isolation, without including guided recommendations, has led to mixed results. In addition, since COVID-19 started, voice of employee (VoE) data, and insights have begun to be incorporated into these processes. Although still in its early stages, the link of VoE and “continuous” talent processes represents a longer-term opportunity for organizations to more proactively “sense and respond” and drive more meaningful business results.

Organizations should consider retraining and potentially redeploying talent across the organization to meet the constantly evolving business needs. This shift has placed new demands on learning and development (L&D) and HCM leaders. Application leaders must update their existing learning processes and technologies to support the demands of continuous performance and talent processes. Organizations should look for ways to constantly develop and improve employee skills, competencies, knowledge and behaviors. As employees receive a growing amount of feedback and recognition, they will require greater coaching advice and resources to allow them to further develop. This shift is needed to address the ongoing changes, as L&D attempts to provide employees with more timely, meaningful and relevant content. Lastly, we expect better integration and

potentially embedding of VoE data and insights within other HR processes, such as continuous performance, rewards and recognition, learning and leadership actions. The goal of these mashups is to build an ongoing “sense and respond” Talent Management system designed to improve performance, engagement, and retention.

Maintaining Compliance

PREDICTION

Compliance won't get any easier in the ongoing pandemic. While the senior living and long-term care industry is primarily focused on helping people, it risks potential compliance violations for multiple reasons—unless technology is put in place to achieve and demonstrate compliance.

Building Proactive Practitioner Frameworks

As previously stated, organizations that develop proactive practitioner frameworks are better prepared to anticipate the need for post-pandemic staff increases, address compliance concerns around facility management, and employ flexible staffing solutions that balance budgets without sacrificing care.

Implementing Prescriptive Priorities

Pre-COVID, patient data served as a beneficial resource for skilled nursing facilities. Post-pandemic, it's invaluable. From tracking potential problems to gaining an increased understanding of patient needs to compiling complete compliance documentation, skilled nursing will require purpose-built data analytics tools capable of delivering prescriptive insight at scale.

CMS has tightened staffing requirements and implemented a strict Five-Star Rating system that makes reaching and maintaining high marks challenging. The federal agency also set out to reform

state-level agencies that perform nursing home inspections on behalf of the federal government. The inspection push came with CMS's position that higher-rated operators should be subjected to fewer surveys to focus more resources on the worst performers. Clearly, facility oversight is a top priority of the federal government.

Evolving Compliance Risks

Ongoing changes in regulations, payment and patient care sweeping the nation's healthcare system are raising the compliance stakes for healthcare organizations, making it more important than ever to address evolving compliance concerns. Non-compliance not only jeopardizes resident care but can also lead to lasting reputational damage and financial consequences, including penalties, higher insurance premiums, and lending rates, that erode an organization's bottom line and undermine its foothold in the industry.

Quality of care is perhaps the most pressing risk. The Office of Inspector General (OIG) is intensifying its scrutiny on quality-of-care issues, evidenced by the increasing number of corporate integrity agreements it entered to resolve False Claims Act (FCA) allegations, which involved quality of patient care issues.

The shift in payment models carries significant compliance implications. Quality of care is becoming more tied to payment as value-based purchasing gains footing, whereas the fee-for-service model did not focus as heavily on quality care in compliance reviews.

To promote higher quality of care, compliance efforts should connect with the entire skilled nursing team on all care expectations, such as identifying and preventing infections, staffing responsibilities, and addressing bacterial and viral resistance.

Operators can inadvertently violate compliance requirements in routine operations as well. For example, they could fail to support paternity leave or predict when professional licenses expire. Intelligent automation software can keep routine matters routinely updated.

CMS has added reporting requirements to training courses and has issued supporting interpretive guidance and training to its surveyors. The OIG has encouraged CMS to impose civil monetary penalties and exclusion provisions for reporting failures, further necessitating compliance involvement.

An operator's compliance program should stay up to date on the numerous reporting requirements, data collection, and other processes and procedures used to satisfy those requirements. Testing and validating the processes and related internal controls are vital to mitigate the financial risk false, incomplete, or inaccurate reporting.

How to Move Toward Next-Generation Compliance

Upgrading the compliance function to support today's rapidly evolving risk environment requires effective and consistent communication among clinical, quality, and compliance functions. These areas often operate in silos with neither staff nor systems communicating effectively with each other. As a result, no one is working with a complete picture of the risk environment and everything being done to mitigate it.

In this environment, the requisite collaboration can take some work. Compliance has traditionally been viewed with a clearly defined scope, encompassing everything from billing and physician agreements to workplace inspections, staffing requirements subject to federal and state regulations. To achieve next-generation compliance, all organizational

functions must understand what the others do and the interconnections among them.

It's essential organizational culture supports cross-functional collaboration from the top down. Organizations can start to break down barriers by including or expanding clinical and quality representatives on the compliance committee, and compliance representatives on clinical and quality committees. Staff should be educated and encouraged to "speak the language" of compliance with all departments.

Here technology can also play a pivotal role. Workforce management software that's developed for senior living can make compliance easier to navigate by automatically tracking staff information every day. As a result, compliance data is available on-demand for surprise inspections as well easily generated to support quarterly compliance reports. Workforce management systems can cover every compliance criterion from staffing hours and payroll to Family Medical Leave to worker's compensation claims and expiring certifications. Violations can be proactively detected and corrected before they impact the organization's compliance reports. With their Five -Star Ratings on the line, operators can't afford to leave anything to chance.

Long-term care organizations need a new compliance approach to address the evolving risks they encounter today and will encounter in the future. In the face of new compliance challenges, this is a task that cannot be delayed. Organizations must manage its risks in a way that greatly improves staff residents' lives by optimizing staffing and the organization's financial performance.

Human Capital Management Technology for Senior Living Operations

Because technology plays such an integral role in making senior living operations manageable, efficient and compliant, IT leaders in senior living operators should:

- Invest in technology that increasingly and intelligently automates the senior living business to enable staff to focus on residents instead of processes.
- Find innovative ways through technology and staffing to reduce costs to balance the downward pressure on profits.
- Solve the increasingly complex senior living work environment by simplifying scheduling and workflow and improving the employee experience to reduce staff churn.
- Introduce a process of continuous talent management and learning to map employee skills to the growing digital business acumen needed in the future.
- Use automation to capture all regulatory requirements in an increasingly complex environment that defies human intervention.

Sources & Suggested Reading

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[CDW: Meeting the Healthcare Challenges of an Aging Population Through I.T.](#)