



PARASOL
ALLIANCE

AI in Senior Living: Expert Insights and Governance

Kristi Stoglin | CCEO

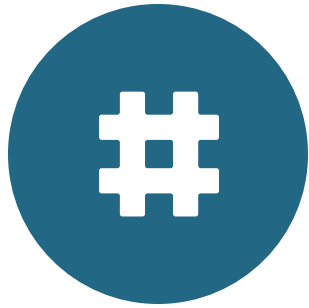
May 2025

Nice to Meet you!

- Assisted with Successful Exit for in2L/Lifeloop
- 15+ years in senior living industry
- Passionate about growing and mentoring teams & individuals
- Mom to two terrific humans, wife and lifelong learner
- CCEO at Parasol Alliance



What We're Hoping to Learn Today



Analyze current AI trends and tools in the senior living industry



Evaluate how you can make informed decisions about the safety of AI programs



Interpret results and trends from key thought leaders in the industry

Who is currently using AI?



2024

a year of joy and sorrow



In 2024, a remarkable wedding celebration in Florida

Jan and I had the delightful opportunity to fly to Florida, America, to witness the beautiful union of our grandsons, Rider Douglas, and his lovely bride, Miriam Santiago. The wedding, held on February 16, 2024, was an unforgettable celebration that we were thrilled to attend.

Our Wonderful Ceremony

The setting for the ceremony was nothing short of breathtaking. Florida, with its rich cultural heritage and stunning architecture, provided a perfect backdrop for this special occasion. The venue was adorned with vibrant flowers and elegant decorations that added to the festive atmosphere. Miriam looked absolutely radiant in her wedding gown, and Rider was beaming with happiness as they exchanged vows. The love between them was palpable, and it was heartwarming to see their families and friends who had come from near and far to support them on this special day.

Our Celebrating Love and Togetherness

The reception that followed was a truly special time filled with laughter, music, and dancing. Guests enjoyed delicious traditional Mexican cuisine, which was a delightful treat for everyone. The music kept everyone on their feet, and the dance floor was never empty. It was truly a day of love and togetherness that brought everyone closer.

Our Wedding Celebration of Happiness

In such a beautiful location, it didn't seem like just a wedding. We with these many happy memories together, filled with love, understanding, and shared adventures. It was a privilege to witness the start of their journey as a married couple, and we are confident that their love will flourish and endure for the rest of their lives. Witnessing their wedding was not just a celebration of love but also a reminder of the enduring bonds of family. We left Florida with cherished memories and hearts full of love.

Happy to Rider and Miriam



A Peaceful Farewell

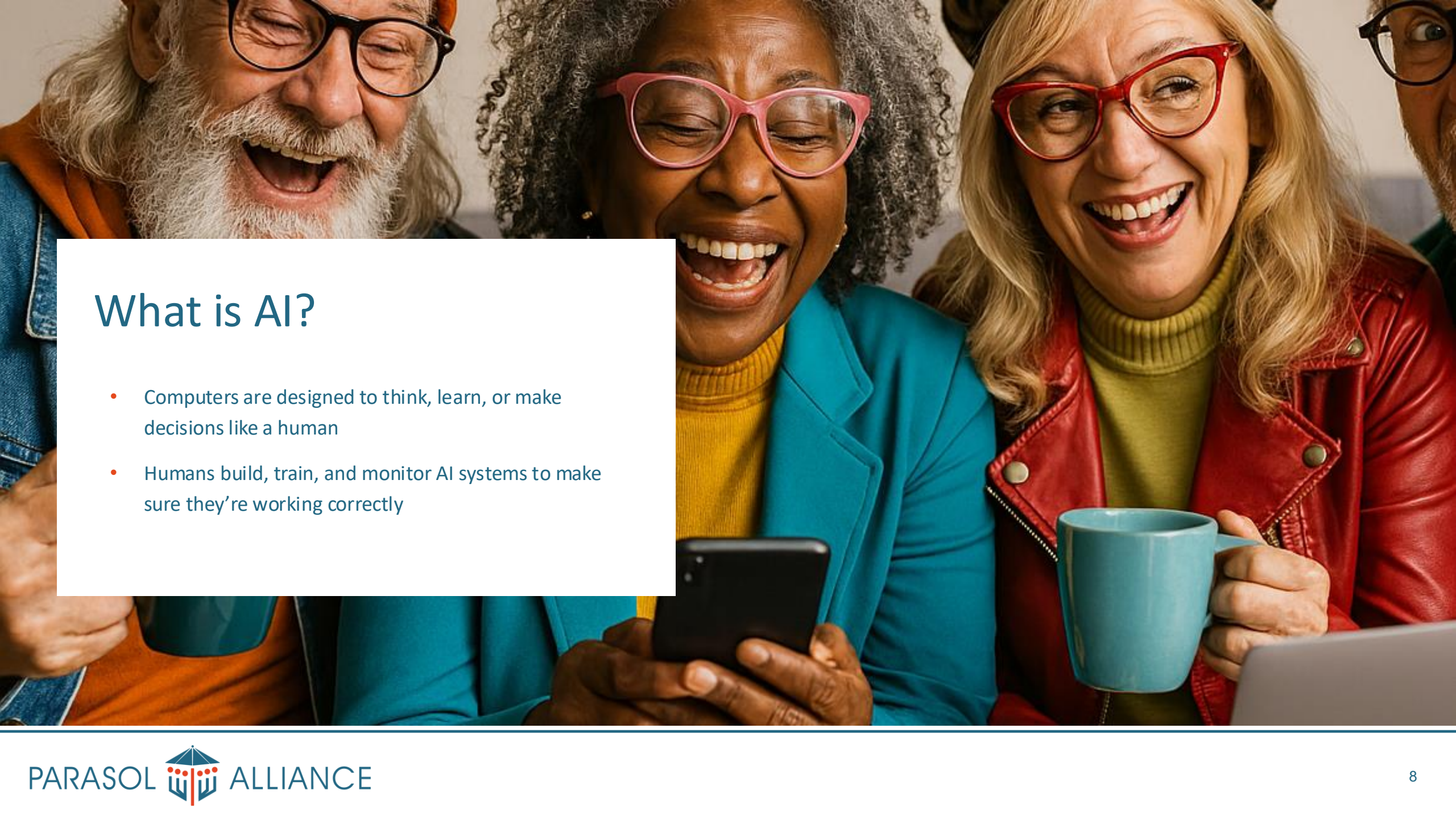
In the early hours of the next morning, surrounded by love, Jan's journey came to an end. Kristi, Chris, Rider, Miriam, Raegan, Grant, and I gathered at her bedside, offering comfort and peace in her final moments. She departed from this world peacefully, leaving behind a legacy of strength, love, and resilience.

AI Basics

What our Clients are Asking

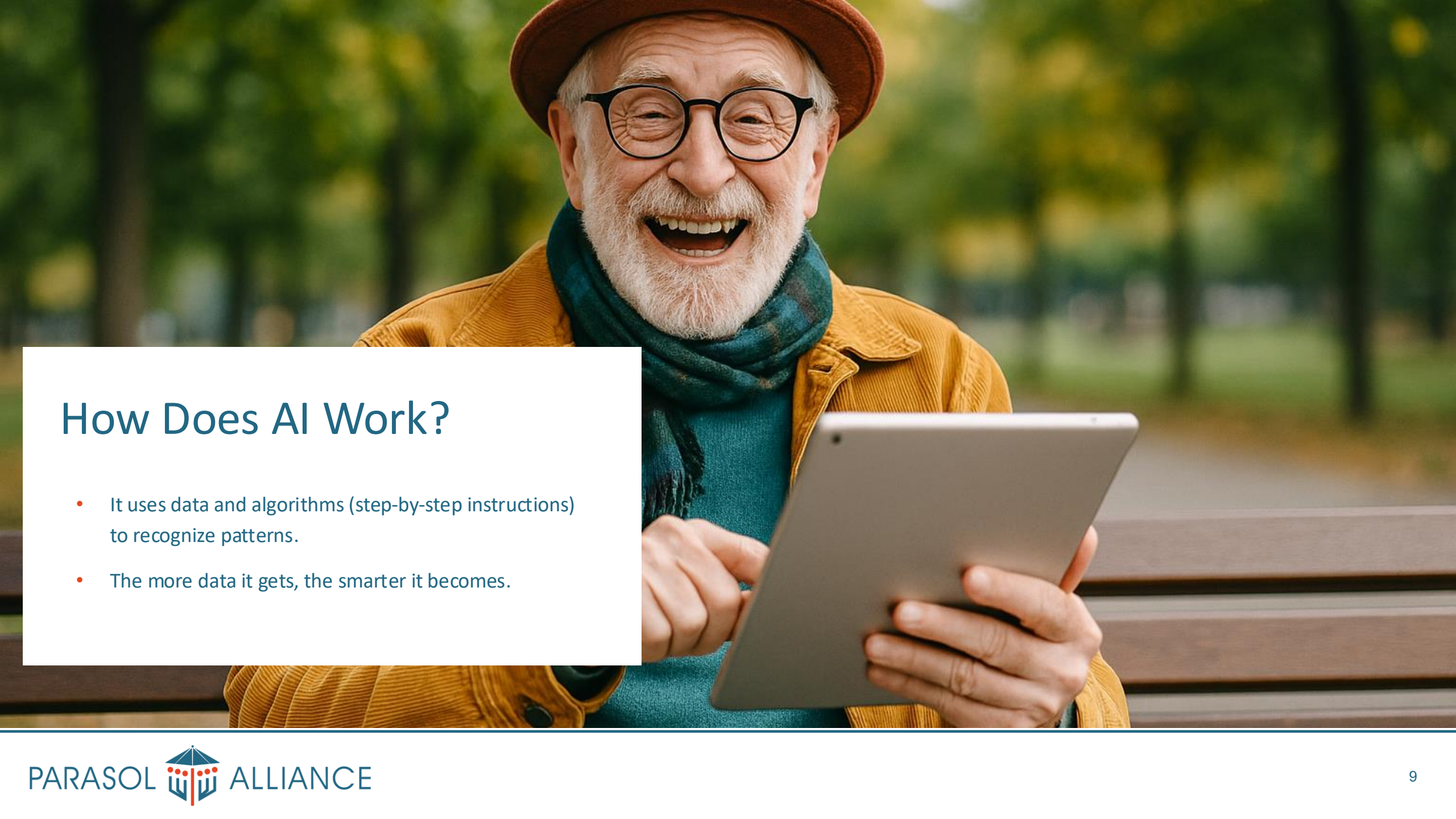
- What is AI?
- How Does it Work?
- What are some examples of AI?
- Are other communities using it?
- Why is AI Important?
- Where do we even start?





What is AI?

- Computers are designed to think, learn, or make decisions like a human
- Humans build, train, and monitor AI systems to make sure they're working correctly

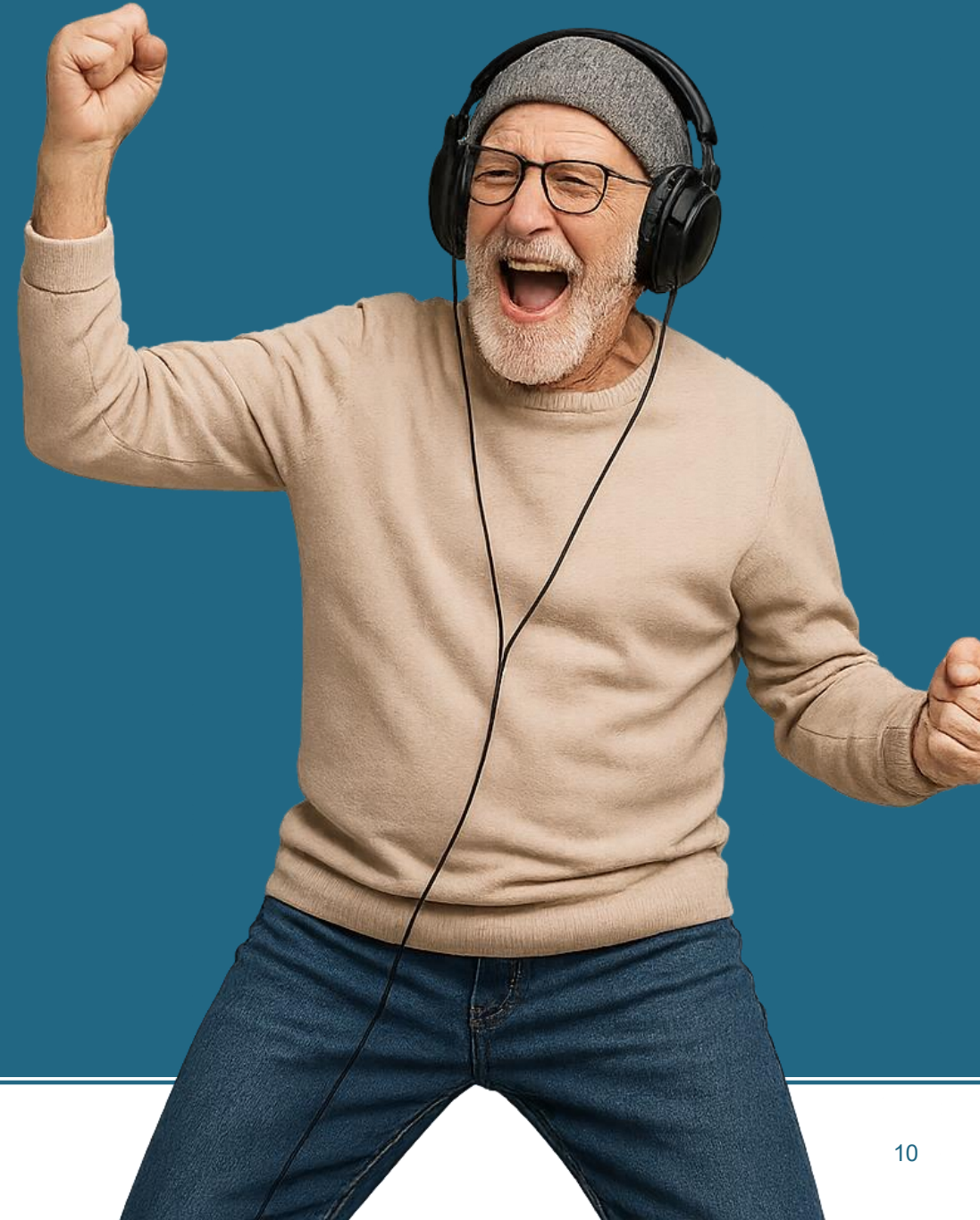


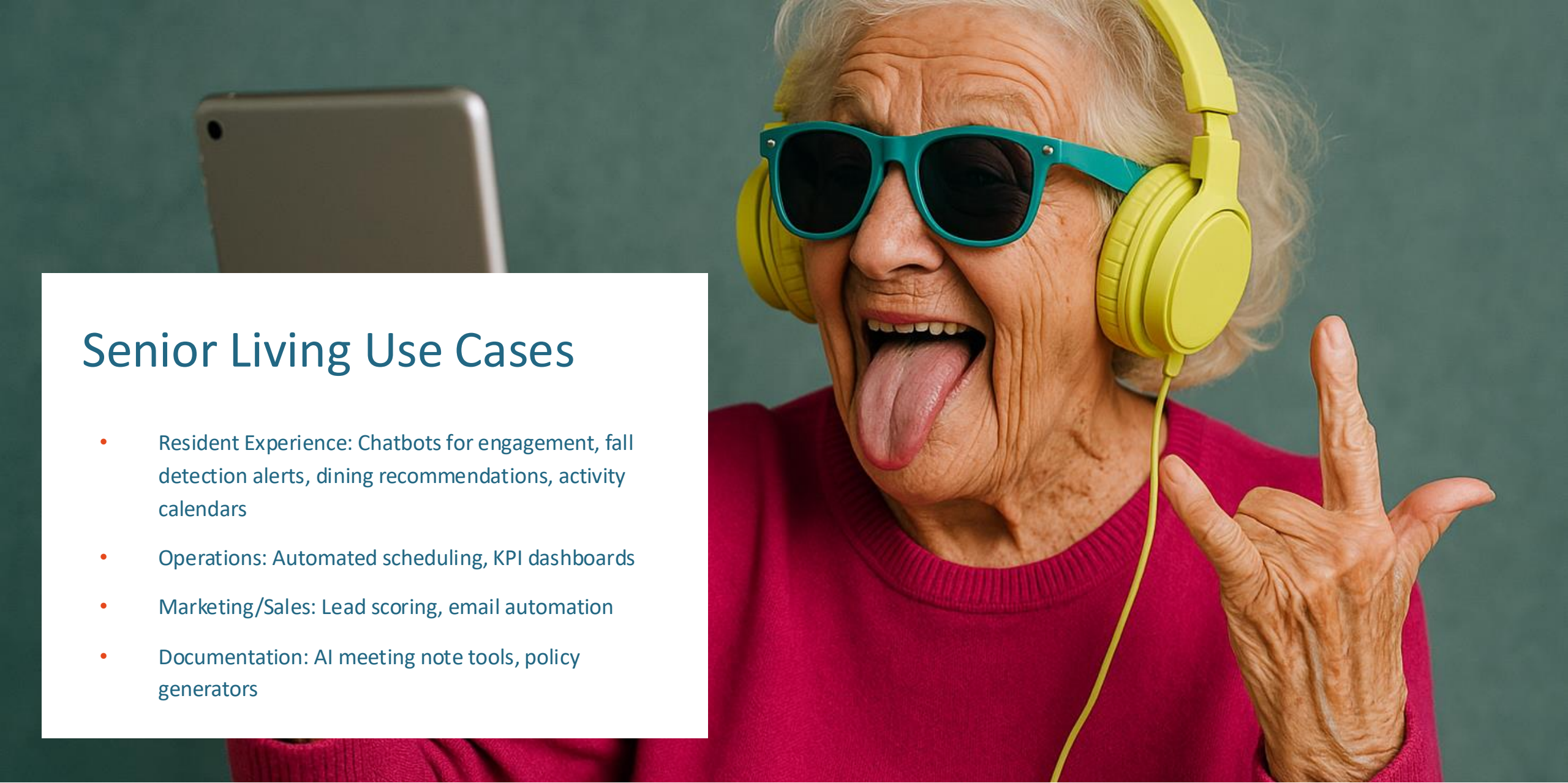
How Does AI Work?

- It uses data and algorithms (step-by-step instructions) to recognize patterns.
- The more data it gets, the smarter it becomes.

Everyday Examples

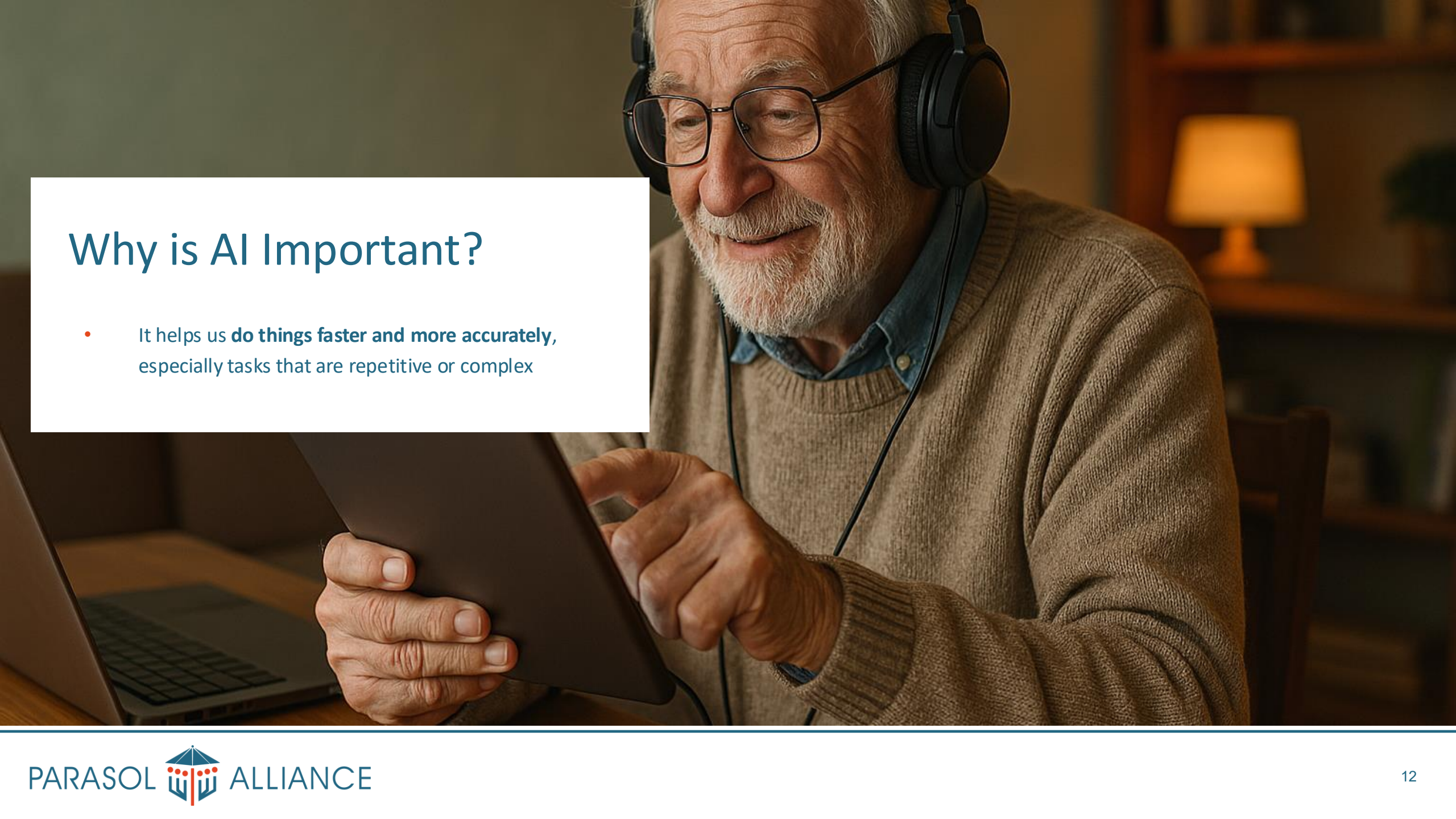
- Voice assistants like Siri or Alexa
- Netflix recommendations that guess what you might want to watch
- Spam filters in your email
- Chatbots that answer questions on websites





Senior Living Use Cases

- Resident Experience: Chatbots for engagement, fall detection alerts, dining recommendations, activity calendars
- Operations: Automated scheduling, KPI dashboards
- Marketing/Sales: Lead scoring, email automation
- Documentation: AI meeting note tools, policy generators



Why is AI Important?

- It helps us **do things faster and more accurately**, especially tasks that are repetitive or complex

How to Succeed with AI



Strong Wi-Fi & infrastructure



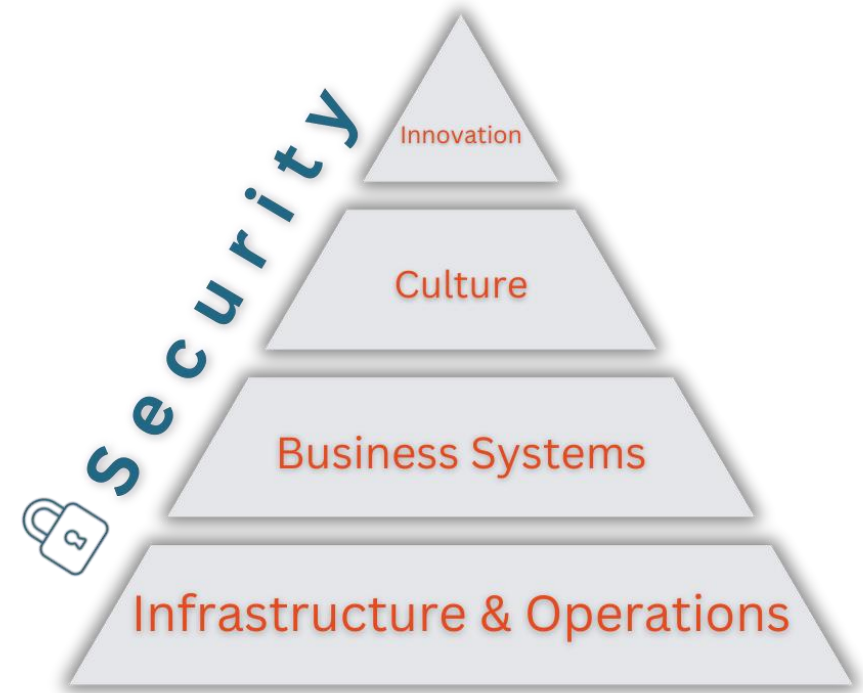
Good business systems data



Staff engagement & training



A clear strategic roadmap



AI Truths: What It Can & Can't Do

 Misconception

 Reality

AI will replace all human jobs.

AI automates repetitive tasks but creates new roles (e.g., AI ethics specialists, automation managers).

AI understands and thinks like humans.

AI only recognizes patterns—it doesn't "think" or have emotions.

AI is always 100% accurate and unbiased.

AI can inherit biases from data; human oversight is essential.

More data = Smarter AI.

Data quality matters more than quantity—bad data leads to flawed AI outcomes.

AI is only for big tech companies.

AI tools (ChatGPT, Canva AI, Grammarly) are accessible to everyone, including small businesses.

Increased Productivity

A study involving 5,172 customer support agents found that access to a generative AI assistant...

14%



Seasoned customer service agents said AI increased productivity

35%



Less experienced agents said AI increased productivity

Where Can You Use AI Today?



Use AI Built Into Your Current Tools

Many platforms already have AI-powered features



Wait for Native AI to Evolve in Your Platform

If your system isn't AI-ready yet, it may be coming soon



Dabble in Platforms like ChatGPT or Microsoft CoPilot

What's holding you back?

Current AI Trends & Tools in Senior Living

Transcription Tools

Virtual Meetings

- Transcriptions, Summaries, & Action Items
- Generate Follow Up Emails & CRM Integration

Benefits

- Accurate Documentation
- Sharing Transcriptions
- Preventing Misunderstandings
- Memory recall (staff and residents)

Physical Recorders

- Resident care meetings
- Family conferences
- Staff shift handoffs

Popular Tools:

- Teams
- Otter
- Fireflies
- Zoom AI Companion
- Read.AI
- Plaud (Physical)

Chatbots

24/7 Support

- Answer Common Questions & Generate Content

Streamlined Workflow Processes

- Drafting documents, emails, or care plans, saving time on administrative work

Communication

- Can translate or explain complex information in simple language for residents or family members

Popular Chatbots:

- ChatGPT or custom GPTs
- Gemini
- Microsoft Bing AI
- Jasper
- Pi

Copilots

What is it?

- Enhanced Form of a Chatbot
- Conversational Interface
- Community's Internal Data Sources

Benefits

- Enhance Productivity & Efficiency
- Better Decision Making based on real-time data
- Improved Compliance & Accuracy
- 24/7 Availability
- System Integration (HR, EHR, Resident Engagement)

Popular Copilots:

- Skypoint
- Microsoft M365 Copilot

Robotics/Assistants

Meela

- An Ai assistant that calls people to chat
- She sounds real
- Organic conversations

Memo-Mate

- An Ai assistant that calls people for information
- Captures life stories
- Takes resident Surveys

[Meela Video](#)

Choosing the Right AI Tools

- Purpose Fit & Real-World Impact

Ensure the AI tool aligns with your specific senior living needs and can demonstrate tangible improvements in operations, care quality, or resident experience.

- Ease of Integration & Usability

Look for AI solutions that seamlessly integrate with your existing systems and provide an intuitive user experience for staff and residents.

- Vendor Experience in Senior Care

Prioritize AI providers with a proven track record and deep understanding of the unique challenges and requirements of the senior living industry.

- Ethical Considerations & Data Governance

Evaluate the vendor's approach to data privacy, algorithmic bias, and ethical AI practices to ensure responsible implementation and resident trust.

- Cost & Support Structures

Consider the total cost of ownership, including licensing, implementation, training, and ongoing maintenance, as well as the level of technical support provided by the vendor.

Governance and Ethical Considerations

Emphasis on Human Oversight

U.S. NEWS

Lawyers submitted bogus case law created by ChatGPT. A judge fined them \$5,000

Two New York lawyers were fined for submitting a legal brief containing six fictitious case citations generated by ChatGPT.

AI Hallucinations = AI models produce plausible-sounding but false information.



Any data input into an AI program will be remembered and added to the overall knowledge of the product.

Treat inputted data the same you would as resident data

Assess the safety of AI programs

- Consult Experts
- Community Feedback
- Certifications and Standards
- Regulatory Compliance

Foundational Steps to Establish AI Governance

Form an AI Governance Committee

Purpose:

Provide oversight, manage risk, ensure ethical use.

Who to include:

1. Executive leadership
2. Clinical representative
3. IT representative
4. Operations lead
5. Legal/Compliance officer
6. Resident or family representative (optional but recommended)

Define Clear Objectives and Use Cases

Purpose:

Clarify the role AI will play and how success will be measured.

Examples:

1. Enhancing resident safety (fall detection, health monitoring)
2. Reducing staff workload (documentation automation, chatbots)
3. Improving resident engagement (personalized programming, social robots)

Create Ethical and Operational Guidelines

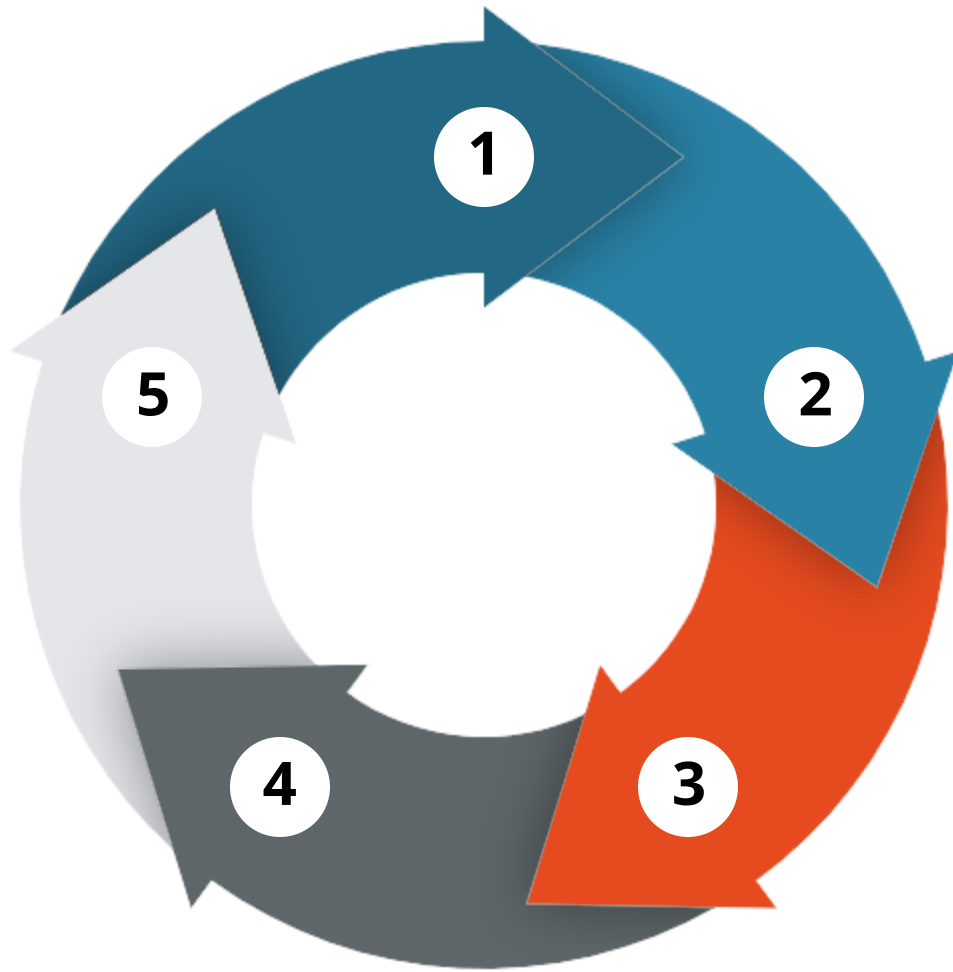
Purpose:

Provide guardrails ensuring AI aligns with community values.

Key Guidelines to develop:

- Resident privacy & consent guidelines (HIPAA compliance, data protection)
- Human oversight policy (keeping humans in control of key decisions)
- Algorithm fairness and bias mitigation
- Transparency & disclosure of AI use
Response plan for AI errors or incidents

AI Governance Ongoing Framework



- 1** Prioritize Use Case
- 2** Conduct AI Vendor Assessments
- 3** Develop an AI Implementation Roadmap
- 4** Train & Educate Staff
- 5** Monitor, Evaluate, & Iterate

Ethical Considerations & Privacy



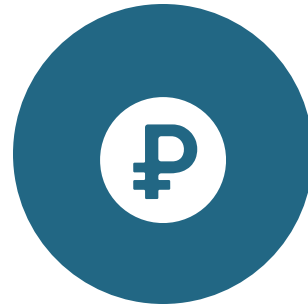
HIPAA Compliance

Ensure AI systems and data practices adhere to HIPAA regulations to protect resident healthcare information.



Data Security

Implement robust data encryption, access controls, and security measures to safeguard resident data from breaches.



Transparency

Provide clear and transparent communication to residents and families about how their data is collected, used, and protected.



Informed Consent

Obtain explicit consent from residents before deploying AI systems that collect or process their personal information.

Prioritizing resident privacy and upholding ethical data practices are critical to building trust and ensuring responsible AI adoption in senior living communities.

Safety & Accuracy



Human Oversight for Critical AI Decisions

Ensure that human experts review and validate the most important AI-driven decisions, especially those that impact resident care and safety.



Risk Management Strategies

Develop clear policies and protocols for addressing AI errors or malfunctions, including ways to quickly identify, mitigate, and communicate issues to residents and staff.



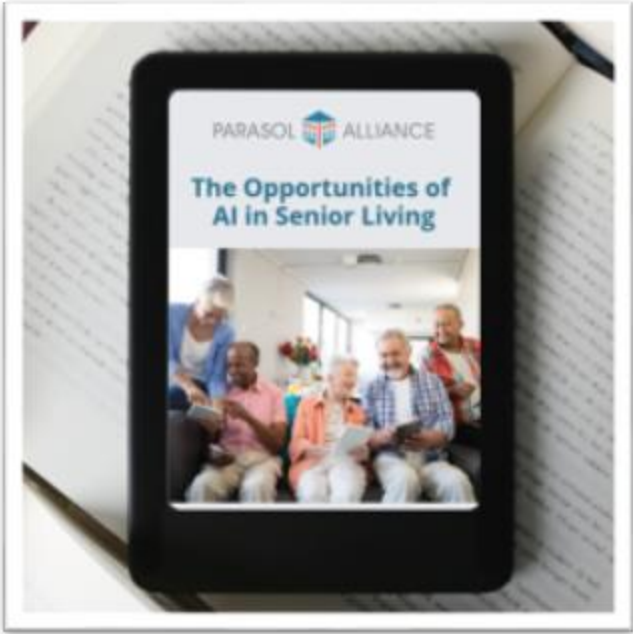
Continuous Monitoring and Validation

Implement ongoing processes to monitor AI system performance, validate outputs, and make adjustments to maintain accuracy and reliability over time.

Thought Leader Insights and Predictions

We Interviewed 18 Senior Living AI Experts

We interviewed them to hear their perspective on where AI is and where it will take us. Each company brings its own creativity, driving innovation in Senior Living technology.



White Paper
Download



Expert Predictions



Automation of Routine Tasks

AI will automate repetitive administrative tasks like scheduling, billing, and documentation, freeing up staff to focus on personalized care.



Personalized Care

AI-powered predictive analytics will provide personalized care plans and proactive interventions based on individual resident data and patterns.



Daily Operations

AI will become a core component of senior living communities, seamlessly integrated into daily workflows, resident engagement, and facility management.



Resident Wellness Programs

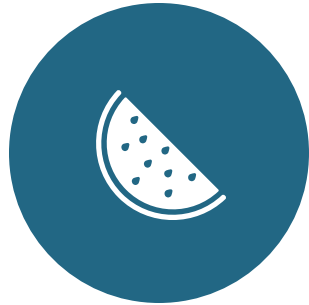
AI-driven monitoring and early detection systems will enable senior living providers to take a more proactive approach to resident health and wellbeing.

Staff Empowerment and AI Acceptance



Training and Education

Provide comprehensive training programs to help staff understand AI capabilities, benefits, and how to use it effectively in their daily workflows.



Start with Low-Hanging Fruit

Identify and implement AI tools that address the most immediate staff pain points, such as automating routine administrative tasks, to build early buy-in and confidence.



Empower AI Champions

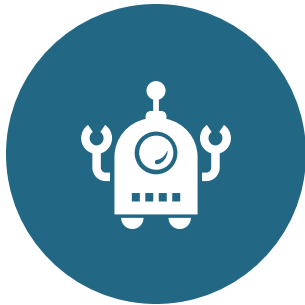
Identify and empower staff members who are enthusiastic about AI to serve as internal ambassadors and advocates, helping to drive adoption and share best practices.



Free Staff to Focus on Care

Leverage AI to automate repetitive tasks and streamline workflows, allowing staff to devote more time to personalized, high-touch interactions with residents.

Pitfalls & Challenges



Over-reliance on AI

Provide comprehensive training programs to help staff understand AI capabilities, benefits, and how to use it effectively in their daily workflows.



Premature Deployment Without Proper Planning

Identify and implement AI tools that address the most immediate staff pain points, such as automating routine administrative tasks, to build early buy-in and confidence.



Data Quality Issues

Identify and empower staff members who are enthusiastic about AI to serve as internal ambassadors and advocates, helping to drive adoption and share best practices.

To avoid these pitfalls, senior living leaders should approach AI adoption strategically, focusing on clearly defined use cases, robust data governance, and a phased rollout with ample human oversight.

Key Takeaways



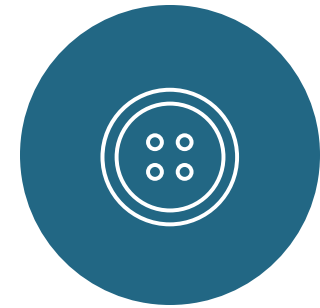
Transformative Potential

AI in senior living is still in early adoption but has immense transformative potential to enhance efficiency, safety, and personalized care.



Governance and Oversight

Implementing AI requires robust governance, transparency, privacy protection, and human oversight to ensure ethical and responsible deployment.



Empower, Not Replace

AI should be leveraged to empower staff and enrich resident relationships, not replace the human touch and empathetic care.

AI is a Connector, Not a Disruptor

**Automate the Mundane,
Elevate the Meaningful**



Want to Learn More?

www.parasolalliance.com
info@parasolalliance.com

Free AI eBook



Raising Tech Podcast



ChatGPT Sora Prompt

"Create image. Create a toy of the person in the photo. Let it be an action figure. Next to the figure, there should be the toy's equipment, each in its individual blisters. 1) a magazine called "Tropical Vacations". 2) A pink pillow in the shape of a heart that says "Mom". The card holding the blister should be strong purple. Also, on top of the box, write 'Kristi Stoglin'. The figure and equipment must all be inside blisters. Visualize this in a realistic way."



Sora is used to create images: <https://sora.chatgpt.com/explore>

ChatGPT Prompt

“Can you please give me an activity that include flowers or paint. Seniors aged 55+ will be participating. Please give me a full list of items needed for each activity. Activities should take approximately one hour.”

Pressed Flower Greeting Cards

Great for storytelling and gift-giving. Easy to do and mess-free.

Materials Needed (per participant):

- Blank greeting cards or cardstock folded in half
- Assorted pressed flowers (store-bought or prepared in advance)
- Tweezers
- White glue or Mod Podge
- Small paintbrush (for applying glue)
- Scissors
- Optional: Decorative paper, washi tape, markers, stamps

Instructions: Arrange pressed flowers on card fronts and gently glue in place using tweezers. Add decorations or short messages inside. Let dry standing open for a few minutes before packing away.