2021-2023
STRATEGIC PLAN
Schlegel-UW Research Institute for Aging (RIA) is a charitable, non-profit organization that enhances the quality of life and care of older adults through partnerships in research, education and practice.

Introduction

The Schlegel-UW Research Institute for aging is a charitable, non-profit organization that enhances the quality of life and care of older adults through partnerships in research, education and practice. As 2020 comes to a close, marking the end of RIA’s 2016-2020 strategic plan, the RIA has seen incredible growth and success.

Our new building, complete with research and community space, and co-located with a living classroom for future health professionals and a long-term care and retirement home, is now a hub for innovation. Our research team is internationally recognized and driving leading edge aging research. We have developed new resources and education to support better care practices, and are spreading these initiatives across the province, the country and around the globe.

While these achievements are celebrated, there have also been challenges, testing our ability to adapt and continually innovate. Most notably, the start of the global COVID-19 pandemic in 2020 has demanded a change in RIA’s plans, and forced us to think differently about the future and how we can best achieve our mission.

This document summarizes current challenges and opportunities, and how our history and unique approach will be the foundation for future success. A process of engagement guided the development of this strategic plan, leading to five aims that build on our past achievements and push us toward our vision.

About The Schlegel-UW Research Institute For Aging

The RIA supports research and explores aging across various topics by engaging stakeholders throughout the research process. Using these research findings, we then create resources, programs, education and training, and inform practice and policy change, to enhance quality of life and improve care for older adults everywhere.
Current Challenges, Future Opportunities

In 2020, the world was significantly and forever changed due to the COVID-19 pandemic. It has challenged all of us to do things differently, to adapt and to innovate. As the RIA looks to strategize into an uncertain future, we see opportunities and remain committed to our vision: a world where research is driving innovation to enrich the journey of aging.

Our oldest citizens have been undeniably the hardest hit by the pandemic. The need for infection control and safety measures to control spread of COVID-19 (and other infections) continues to be essential. However, these measures have also greatly affected quality of life. Finding a balance to ensure safety while honouring older adults’ preferences is a core tenet of culture change, and will be essential in the years to come.

While we have seen positive societal shifts as a result of culture change, ageism is still ever-present. Eliminating ageism remains a priority for the RIA, as is the celebration of diversity and the need for equity and inclusion among older adults and across the age span.

We know the benefits of experiential learning and the opportunity this offers to support much needed workforce development in the senior living sector. While experiential learning has tended to equate to “face-to-face” learning within care and living environments, advances in virtual technology have opened many opportunities to improve care and develop and deliver innovative education.

At the RIA we are undaunted by the challenge, and inspired by the opportunity to innovate — to improve care practices, health care services, training and education for the senior living sector, and ultimately change the way we age in Canada.

History

As we look ahead to the changing landscape of the future, we recognize the importance of where we started. The RIA is the product of the philanthropic spirit and vision of Dr. Ron Schlegel. He is a researcher and a businessman, and was inspired to enhance quality of life for older adults from a very young age. His family has been providing seniors care to Ontario residents since the 1950s.

His goal, in forming the RIA, is to facilitate practice-relevant research and research-informed practice. In 2005, the RIA began as a senate-approved institute at the University of Waterloo, and in 2007, was incorporated as a non-profit charitable organization. Formal partnerships were established with the University of Waterloo, Conestoga College and Schlegel Villages to support Schlegel’s vision for integrating research, education and practice.

Over the past 15 years, we have stayed true to that collaborative spirit, strengthening and developing strategic partnerships, and building a reputation of excellence in research and innovation to improve quality of life.

We have a culture of innovation and quality, and a thirst for continuously finding ways to be better.
Our Unique Approach

We tackle the biggest issues facing an aging population by investing in knowledge mobilization, or simply put, connecting research to the real world. The impact of research can take decades to realize, but the RIA’s unique approach enables research to be applied in real-time in real-life settings. This process of connecting research and education to the real world sets us apart from other research institutes.

Collaboration is a key element of our unique approach. Research questions are shaped by the realities and needs of older adults, care partners, health professionals, educators and industry. They are integral partners in the research process. Then we work together to use what we’ve learned and develop resources, programs, education and training to influence practice and policy.

Innovation is also central to our work.

“Innovation is simply making things better, doing things better, and having a culture of doing things better.”
- The Right Honourable David Johnston, 28th Governor General of Canada and Chair of the Rideau Hall Foundation

Our Incubation-Acceleration-Mobilization (IAM) approach to innovation is another key element of our unique approach. IAM includes three phases:

- **Incubation:**
  Discovering and developing new ways of doing things

- **Acceleration:**
  Trialling innovations in additional or new settings to understand how and why they work

- **Mobilization:**
  Sharing what is learned to benefit older adults everywhere

Ultimately, we find solutions that truly work and share them to benefit older adults everywhere. We know this is the best way to make change and have impact.

Partners

The RIA’s innovative approach is made possible through strategic collaborations. We strongly believe that collaboration and partnership are key to driving innovation and accelerating impact. The RIA partners with many different organizations, academic institutions and networks to achieve our mission.

**Core Partners:**

- The RIA’s core research partner is the University of Waterloo to advance knowledge and practical research across the journey of aging.
- The RIA’s core education partner is Conestoga College to support education and training for current and aspiring health care professionals.
- The RIA’s core practice partner is Schlegel Villages to test new innovations in real-life settings.

**Partners:**

- Centre for Family Medicine Family Health Team
- Conrad Grebel University College
- GeriMedRisk
- McMaster University
- Sheridan College
- University of Guelph

“A culture of innovation doesn’t happen by accident, but by countless daily acts and sustained efforts over time. It happens because we make it happen. It happens because we believe that to be innovative lies at the heart of what it means to be Canadian. To ask, ‘How do we do things better?’—and then do just that—is part of the basic makeup of our country.”

— The Right Honourable David Johnston, 28th Governor General of Canada and Chair of the Rideau Hall Foundation²

Process Of Development And Engagement

The development of this strategic plan was guided by a small working group on behalf of the RIA Board of Directors. Our last strategic planning process began with a one-day in-person workshop to engage stakeholders and co-develop the strategic plan. This time, due to the pandemic and restrictions on large gatherings, all engagement activities were held virtually. The goal of co-developing and fully engaging the RIA Board of Directors, RIA team, RIA Schlegel Research Chairs and Specialists and key partners was accomplished through key informant interviews, virtual engagement sessions, a SWOT (strengths, weaknesses, opportunity and threats) analysis, input from RIA evaluation surveys and a review of key documents, including an assessment of our achievements from our 2016-2020 strategic plan.

There were also key areas highlighted as opportunities as we look towards the future. Stakeholders felt that the next three years could focus on raising the profile of the RIA nationally. They encouraged us to sharpen our focus to a few key areas of impact, and to clearly articulate and measure our impact on quality of life and care in these key areas.

Enhancing our commitment for diversity, equity and inclusion was also encouraged. We were encouraged to intentionally recruit for diversity on the RIA Board of Directors, RIA team and Schlegel Research Chairs and Specialists. We should ensure that our education and resources are co-designed WITH and meet the needs of diverse audiences.

Finally, we were encouraged to continue to strengthen our knowledge mobilization capacity and expertise in co-design to drive system transformation. RIA is well-positioned to be a leader in knowledge mobilization by supporting evidence-informed practice change and implementation of best practices across the senior living sector.

To address the challenges facing an aging population and seize the opportunities to build on our strengths, the following strategic aims will guide our work for 2021-2023:

1. Achieve global impact through a growing reputation of innovation
2. Deepen internal research collaborations and strengthen external research networks to have a meaningful impact on aging research and knowledge mobilization nationally
3. Accelerate the spread and integration of research into practice
4. Deliver education that fully integrates living, learning and care
5. Drive culture change in aging across Canada

As RIA continues to grow, develop and mature, we need to continue to improve and enhance our internal organizational capabilities. Over the next three years, RIA:

- Elevates IT and business processes to increase effectiveness and efficiency
- Grows and diversifies revenue sources (fundraising, government contracts, research and project grants and marketing/sales)
- Enhances knowledge mobilization skills and capacity across RIA team and researchers
- Builds RIA brand awareness across key program and research areas
- Strengthens our core partnerships with University of Waterloo, Conestoga College and Schlegel Villages and deepens our partnerships with others
Strategic Aim 1:

Achieve global impact through a growing reputation of innovation

Over the last five years, a key area of focus was leveraging our physical infrastructure and network to create opportunities for innovation and collaboration across research, education and practice.

One of our greatest assets is our physical infrastructure and its ability to bring different people together to connect and innovate. This infrastructure provides social and work spaces for integrated learning, research and education. It encourages connection between older adults, care partners, students, community members and researchers. This paves the way for better practices, programs and policies within the ever-changing landscape of long-term care, retirement and seniors care.

The RIA has optimal infrastructure to be a leader in connecting research to the real world, known as knowledge mobilization. We have a culture of innovation and quality, and a thirst for continuously finding ways to be better. A key component of knowledge mobilization is engaging with stakeholders and end-users at every level to ensure our work is meaningful and relevant. RIA is well-positioned to advance both the practice and science of co-design through our unique partnership approach, distributed infrastructure, and commitment to knowledge mobilization.

As the first institute in Canada to co-locate research, education and practice for aging, the RIA will focus on sharing and promoting our impact in key areas over the next three years. RIA will continue to strengthen our partnerships and build on our strong reputation to share our research and resources to benefit older adults nationally.

OUTCOMES

1.1 The RIA is recognized across Canada as making significant impacts in the following key areas:

- Culture Change
- Dementia
- Workforce Development
- Technology-enabled senior living
- Co-design: advancing the science and practice of co-design

1.2 The RIA has clearly defined, measured and demonstrated impact on quality of life and care of older adults in culture change, dementia, workforce development, technology-enabled senior living, and co-design.

1.3 The RIA building and network is fully active driving innovation through integration among researchers, educators, residents, students, staff, health care providers and the general community.

1.4 The RIA will host an interdisciplinary research symposium on Dementia by 2023.
Strategic Aim 2:

Deepen internal research collaborations and strengthen external research networks to have a meaningful impact on aging research and knowledge mobilization nationally

Currently, the RIA research team is comprised of 10 Schlegel Research Chairs, 4 Schlegel Specialists and 21 RIA Research Scientists, who explore various theme areas and conduct research that directly impacts quality of life and care for older adults. RIA researchers work together as interdisciplinary teams to explore the breadth of components that contribute to enhanced well-being.

Schlegel Research Chairs are experts in their fields and lead a team of researchers and students. Each Chair is jointly funded between the RIA and a university or college. Schlegel Specialists are also experts in their fields and affiliated with a university, college or other organization, and their positions are partially funded by the RIA.

As we adapt and work to transform aging in a post-COVID world, using virtual and assistive technologies to enhance the health, well-being, safety and independence of older adults will become more and more a part of daily life. RIA will innovate, develop and test new ways of supporting older adults to live well in long-term care, retirement and the community.

Over the next three years, the Schlegel Research Chairs and Specialists will focus on deepening collaborations, growing the RIA network and leveraging each others’ strengths to generate and mobilize meaningful, relevant and applied research. This research will help transform the health care system. It will solve real-world problems and enhance the quality of life and care of older adults provincially, nationally and internationally.

OUTCOMES

2.1 Three new Schlegel Research Chairs are recruited by 2023.

2.2 Collaboration and coordination across the Chairs and Specialists deepens and expands to include national and international networks.

2.3 The number of researchers (post docs, graduate students and scientists) on Schlegel Chair and Specialist teams doubles by 2023 with the goal of creating greater impact on enhancing the quality of life and care for older adults.

2.4 Opportunities to support additional Specialists are explored.

2.5 Research informs health system transformation (e.g., integrated models of care, learning health system, virtual care technologies, smart home and homecare technologies).
Strategic Aim 3: Accelerate the spread and integration of research into practice

Too often research finds innovative solutions to real-world problems, yet this knowledge is not adopted or spread to the policy makers, clinicians, educators and older adults who could benefit the most. The RIA’s unique-in-the-world infrastructure creates the optimal environment to support co-design, which actively involves stakeholders throughout the research process and development of resources to ensure outcomes are practical, useable and meaningful.

The RIA is always seeking opportunities for learning and improvement, by engaging in deliberate self-reflection and rigorous evaluation of the Incubation-Acceleration-Mobilization approach to innovation.

The RIA’s innovative approach to knowledge mobilization relies on strategic collaborations. We strongly believe that collaboration and partnership are key to driving innovation and accelerating impact. The RIA has three core partners: University of Waterloo, Conestoga College and Schlegel Villages. In addition to our core partners, the RIA collaborates with a number of other universities, colleges, research institutes, organizations, long-term care homes, retirement homes and networks to drive evidence-informed practice and quality outcomes. The next three years will focus on deepening our current partnerships and building new collaborations to share our learnings, expertise and resources nationally.

OUTCOMES

3.1 By 2023, at least 30% of RIA initiatives (e.g., research, training programs, knowledge products, resources, etc.) are co-designed with stakeholders and end users. By engaging diverse stakeholders with a commitment to accessibility, diversity, equity and inclusion throughout the research process and development of knowledge mobilization (KMb) resources it ensures RIA’s work has practical impact.

3.2 Partnerships with stakeholders to use research to drive evidence-informed practice and quality outcomes are deepened and expanded.

3.3 By 2023, The RIA has developed pan-Canadian partnerships with leaders in the KMb space to promote and share our learnings, expertise and resources with others with the goal of being recognized nationally as a leader in KMb.

3.4 The RIA publishes on the impact of the Incubation-Acceleration-Mobilization (IAM) model, including identifying a common evaluation framework with key indicators at each phase of the model.

3.5 The RIA continues to build expertise in both the practice and the science of knowledge mobilization.
Strategic Aim 4:
Deliver education that fully integrates living, learning and care

Over the last five years, the RIA has focused on building system capacity and workforce preparedness in senior living and care through various experiential education and training programs and resources. Experiential learning provides learners with opportunities beyond the classroom to learn while doing. This has included the Living Classroom\(^1\), which is an interprofessional approach, whereby a Personal Support Worker or Registered Practical Nurse certification program is delivered within the context of a long-term care (LTC) home, with team members consisting of faculty, students, LTC teams, residents and families, who engage with each other within a culture of interactive learning. Other experiential learning opportunities include food service worker days, think tanks, toolkits and international delegations wanting to learn by seeing and doing.

Workforce development continues to be a priority in senior living. The growing demand coupled with existing workforce shortages creates an urgency to attract future health care professionals and retain current team members to provide quality care and enhance the well-being of older adults. Models of care will change in the wake of COVID-19, with more emphasis on interprofessional practice, team-based care and more dedicated pairing of care partners with residents.

In the next three years, RIA will build on this success by continuing to create experiential learning resources and opportunities and explore new innovative ways to increase the reach and impact of our educational resources. We are committed to ensuring that our education and resources are meeting diverse stakeholder needs, with a commitment to accessibility, diversity, equity and inclusion. We believe that providing practical, real-life experiences will encourage more people to find their passion for enhancing the well-being of older adults.

OUTCOMES

4.1 The RIA expands our reach by 25% in providing experiential learning resources and evaluating the impact of our resources.

4.2 The RIA continues to support others to adopt the Living Classroom model.

4.3 The RIA delivers education in innovative ways to meet the diverse needs and experiences of our stakeholders, with a commitment to accessibility, diversity, equity and inclusion.

4.4 The RIA collaborates with stakeholders on addressing workforce development needs through the Ontario Centres for Learning, Research and Innovation in Long-Term Care.

4.5 The RIA explores piloting rotations for health practitioners in long-term care and retirement homes, and arranging for scholarly and senior leader national and international residence exchanges.

\(^1\) The Living Classroom model was jointly developed by Conestoga College, the RIA and Schlegel Villages.
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Strategic Aim 5:
Drive culture change in aging across Canada

The world has been forever changed by the COVID-19 global pandemic and our most vulnerable citizens are significantly impacted with safety protocols contributing to isolation and lack of meaningful and purposeful activities, compounded by severe workforce shortages and system challenges. Balancing care and safety while promoting quality of life is a key focus of the culture change movement.

As a leader in culture change across Canada, the RIA has the opportunity to drive system and organizational transformation to support a holistic approach to care and life that includes supporting well-being, joy, meaning and purpose, where the voices of older adults and those working with them are heard and respected.

OUTCOMES

5.1 RIA’s culture change clients grow by 75% with national spread of coaching, education and resources.

5.2 The RIA strengthens the national culture change network by hosting the fourth national culture change conference in 2022 with over 250 participants.

5.3 The RIA contributes to system transformation by influencing the culture of seniors care and living.

In Conclusion

The RIA is looking forward to building on the successes of the last 15 years and creating a world where research is driving innovation to enrich the journey of aging. We will remain true to our values of excellence, relevance, collaboration, transparency and inclusion as we work together to face an uncertain future. Our culture of innovation and quality, and our thirst to do better will support our aim to enhance the quality of life and care of older adults. By deepening and expanding our research, accelerating the spread of innovations, driving culture change, delivering integrated and experiential education, and growing our impact nationally and globally, through 2021 to 2023, RIA will endeavour to have a lasting impact on older adults everywhere.