Dear Friends,

RIA has had an exciting and challenging year. We kicked off a new and ambitious strategic plan, restructured our staff team for future success, and began an evaluation of our impact on quality of life and care for older adults.

The new 5-year strategic plan focuses on driving and mobilizing innovations utilizing RIA’s expansive infrastructure and networks. While the plan pushes the envelope and aims for national and international impact, these goals are within reach. RIA’s 10 plus years of operations have laid the groundwork for the achievements described in this report.

To highlight a few, we welcomed new researchers to the team, expanding our expertise in technology for independent living (Dr. Jennifer Boger), memory care (Dr. Linda Lee), and spirituality (Jane Kuepfer). And we continue to add world-class leaders with at least three more on deck to start in 2017. We also hosted the 2nd national conference on culture change – Walk with Me – in Alberta, and two highly successful ‘Culture Change Exchange’ events in Ontario. These initiatives continue to build RIA’s profile as a leader in changing the way we age in Canada.

A staff restructuring also contributed to RIA’s success, as positions were shifted to capitalize on strengths and maximize impact. For me personally, I was honoured to step into the role of executive director and lead this incredible team, but I knew I had big shoes to fill. In the summer of 2016, Mike Sharratt decided to transition from his role as President to the Senior Director of University Partnerships, where he could have a little more time to spend with family or up at the cottage and still support RIA with his many strengths. In the Fall, Mike became ill and passed away before the close of the year. It was a devastating loss. We have included a tribute to Mike on page 24 of this
report, but it does not do justice to his incredible contributions to RIA, our team, and the many researchers and students he mentored. We miss him, but are determined to carry on his legacy.

I would also like to acknowledge our partners – Schlegel Villages, Conestoga College, Universities of Waterloo, McMaster and Guelph, Centre for Family Medicine, and Sheridan College, to name a few. Partnership and collaboration is at the core of what we do, and the diverse number of organizations with which we connect allows us to be holistic and balanced in our approach. We have a breadth of expertise that allows for in depth explorations. We also tap into many different networks, accelerating our reach as we mobilize innovations across the sector and beyond.

Finally, none of this would be possible without the generous support of our donors. We thank you. Your gifts, whether they be financial or in time or talent, have and will continue to make a difference in the lives of older adults.

We look forward to another exciting year together.

Sincerely,

Josie d’Avernas
Executive Director, Schlegel-UW Research Institute for Aging
The Schlegel-University of Waterloo Research Institute for Aging (RIA) is a non-profit, charitable organization that partners with the University of Waterloo, Conestoga College, Schlegel Villages, and many other organizations and academic institutions, to enhance the quality of life and care of older adults.

RIA is a product of the philanthropic spirit and vision of Dr. Ron Schlegel and the Schlegel Family, who founded the organization in 2005. A Board of Directors meets quarterly to provide strategic oversight, set priorities, and identify opportunities for RIA. The staff team supports operations and a network of researchers, educators and practitioners. RIA’s annual operating budget of over $3M is supported by contracts, grants and generous donors.

WHAT WE DO

RIA is an innovation catalyst. We tackle some of the biggest issues facing an aging population by disrupting the traditional academic model. The impact of research can take decades to realize, but RIA’s unique approach of integrating research, education and practice enables learnings to be applied in real-time in real life settings.

This investment in driving practice-relevant research, combined with knowledge mobilization, is what sets RIA apart. Research questions are shaped by the realities and needs of older adults, care partners, health professionals and educators. The resulting findings influence practice and policy, and inform education and training. RIA drives innovation by finding solutions that truly work, and then shares them to benefit older adults everywhere.
MISSION
To enhance the quality of life and care of older adults through partnerships in research, education and practice

VISION
To be one of the top five innovation institutes for aging in the world

VALUES
- Excellence
- Relevance
- Innovation
- Transparency
- Collaboration
- Accountability
We asked our lead researchers to share how their work benefits quality of life and care for older adults in one sentence.

We also asked them to share one interesting fact about themselves. They had some surprises up their sleeves.

DR. JENNIFER BOGER
BSc, MSc, PhD, PEng, Schlegel Research Chair in Technology for Independent Living, University of Waterloo

- I create innovative technology with and for older adults to complement their needs and support well-being.
- I spent five years of my childhood sailing around the world with my family (yes, we went around the whole thing).

DR. VERONIQUE BOSCART
RN, BScN, MScN, PhD, CIHR/Schlegel Industrial Research Chair for Colleges in Seniors Care, Conestoga College

- By building strong, engaged and competent teams in long-term care, we can improve resident’s care and promote meaningful lives.
- We make our own maple syrup at home - a very time consuming and large undertaking, but totally worth it.
DR. ANDREW COSTA
BSc, PhD, Schlegel Research Chair in Clinical Epidemiology & Aging, McMaster University

- My work focuses on the use of health information so that care partners understand the strengths and needs of the people they serve, and also understand how well they are doing it.
- I can hold my breath for 2 minutes at a depth of 20 meters trying to spear some lunch... without dying.

DR. GEORGE HECKMAN
BASc, MMath, MSc, MD, FRCP(C), Schlegel Research Chair in Geriatric Medicine, University of Waterloo

- I hope I enhance care and quality of life - the only way to really do so is to listen.
- I dabbled in oceanography once. I took a two week cruise aiming to assess how water and nutrients mix in the Gulf of St. Lawrence. Seasick once. Otherwise excellent government food!

DR. RICHARD HUGHSON
BSc, MSc, PhD, Schlegel Research Chair in Brain Health & Vascular Aging, University of Waterloo

- My team is developing simple methods to identify older adults who aren’t getting enough blood and oxygen to their brain so we can work to improve brain blood flow and ultimately reduce the risk of falls and cognitive decline.
- I’ve had the opportunity to work with 30 astronauts, including Chris Hadfield, and get to talk directly to the astronauts from our lab at the RIA.
DR. HEATHER KELLER
RD, BASc, MSc, PhD, Schlegel Research Chair in Nutrition & Aging, University of Waterloo

- Food is essential for health and quality of life - the experience of eating with others and how this nourishes not only the body but the soul is a key aspect of my work.
- I wanted to be a violinist when I was in highschool.

DR. LINDA LEE
MD, MCISc(FM), CCFP, FCFP, Schlegel Chair in Primary Care for Elders, Centre for Family Medicine

- My work involves improving access to coordinated team-based care for persons with dementia and their care partners through the development of primary care collaborative memory clinics across Ontario.
- I have 3 parrots.

DR. JOANNE HO
Schlegel Clinical Research Scientist, McMaster University

- I empower health care professionals to optimize their patients’ medications thereby optimizing their cognition, function and quality of life.
- I love to weed my vegetable garden.
JANE KUEPFER
Schlegel Specialist in Spirituality & Aging, Conrad Grebel University College

- I listen to understand deeply what matters most as we support the spirits of our residents, and work with spiritual care providers, family and community to undergird daily life with meaning.

- When our daughter was born my great-grandmother was still living, so I’ve had the experience of being part of a five generation family (with all generations living in the same small town!)

DR. JAMES MILLIGAN
BSc.P.T., MD, CCFP, RIA Director in Mobility & Falls, Centre for Family Medicine Mobility Clinic

- I am interested in adults with mobility issues and falls, looking for ways to prevent and manage these in order to prevent injury and improve or maintain quality of life.

- I am a soccer fan, continuing to play (and get injured) and follow primarily German soccer.

Our team of Chairs and Specialists is always growing. Dr. Al Power (Schlegel Chair in Aging and Dementia Innovation), Dr. Lora Giangregorio (Schlegel Research Chair in Mobility and Aging), and Dr. Kate Dupuis (Schlegel Innovation Leader for Arts and Aging) will join the team in 2017.

There are also many other research scientists from various academic institutions that partner and collaborate with RIA.

To learn more, visit our website at www.the-ria.ca.
The following list indicates members of the Board of Directors at the end of the 2016 calendar year:

**CHAIR OF THE BOARD**
- **Dr. Ronald P. Schlegel**, O.C., PhD, LL.D., BAS (Honourary), Founder

**MEMBERS**
- **Dr. Veronique Boscart**, RN, BScN, MScN, PhD, CIHR/Schlegel Industrial Research Chair for Colleges in Seniors Care, School of Health & Life Sciences and Community Services, Conestoga College Institute of Technology and Advanced Learning
- **Paul Brown**, Chief Operating Officer, Schlegel Villages
- **Dr. Roy Cameron**, PhD, FCAHS, Executive Director, Homewood Research Institute
- **Josie d’Avernas**, BSc, MSc, Executive Director, Schlegel-UW Research Institute for Aging
- **Dr. Paul Fieguth**, PhD, Peng, Professor & Chair, Faculty of Engineering, University of Waterloo
- **Dr. Richard Hughson**, BSc, MSc, PhD, FCAHS, Schlegel Research Chair in Vascular Aging & Brain Health, Professor, Faculty of Applied Health Sciences, University of Waterloo
- **Dr. Joe Lee**, MD, CCFP, FCFP, MCISc(FM), Chair & Lead Physician, The Centre for Family Medicine
- **John Milloy**, DPhil, Community Representative
- **Marlene Raasok**, BSc, Pharm, MHSA, Community Representative
- **Dr. James Rush**, BSc, PhD, Dean, Faculty of Applied Health Sciences, University of Waterloo
- **James Schlegel**, MAcc, CPA, CA, President & Chief Executive Officer, R-B-J Schlegel Holdings Inc.
- **Dr. Jake Thiessen**, BSc (Pharm), MSc, PhD, Community Representative
- **Elizabeth Witmer**, BA, Community Representative
The following list indicates members of the RIA staff team at the end of the 2016 calendar year:

- **Susan Brown**, BSc, MSc, Director of Research Coordination and Research-Practice Integration
- **Lora Bruyn Martin**, BSc, MASc, Research Application Specialist
- **Darly Dash**, MSc, Evaluation Project Officer
- **Josie d’Avernas**, BSc, MSc, Executive Director
- **Kate Ducak**, BA, MA, CPG, Communications Associate and Culture Change Project Officer, Schlegel Centre for Learning, Research and Innovation in Long-Term Care (CLRI)
- **Hilary Dunn**, BAS, MSc, Director of Communications and Program Manager, Agri-food for Healthy Aging
- **Kim Fitzpatrick**, BA, Project Manager, Schlegel Centre for Learning, Research and Innovation in Long-Term Care (CLRI)
- **Gert Hartmann**, BA, Director of Business Development and Community Partnerships
- **Amy Matharu**, Research Assistant
- **Chelsea White**, H.B.Comm., Project Officer, Schlegel Centre for Learning, Research and Innovation in Long-Term Care (CLRI)
- **Kate Wilson**, Office Manager

We would like to express our sincere thanks to Ken Murray for his long-term service on the board (2007 – 2016). His contributions over the past several years have both informed and advanced RIA’s strategic directions, contributing to our ongoing success.
RIA ORGANIZATIONAL STRUCTURE

Board of Directors

University of Waterloo
Conestoga College
Schlegel Villages (Living Research Environments)

Satellite Universities
Satellite Colleges
Community Partners

RIA Team

Research and Practice Development Programs

Geriatric Medicine
Vascular Aging & Brain Health
Workforce Development & Interprofessional Practice
Agri-food for Healthy Aging (A-HA)
Primary Care for Elders

Clinical Epidemiology & Aging
Technology for Independent Living
Living with Dementia
Optimizing Medications for Older Adults
Spirituality & Aging

Physical Activity & Plasticity of Aging
Age-Friendly Physical Environments
Mobility & Falls
Arts & Aging

Annual Report 2016
It should come as a no surprise to learn that a sedentary lifestyle can have a serious detrimental impact in the lives of older adults. Making an effort to increase daily physical activity, even by a little bit, can counter such consequences.

In response to RIA research on the subject, the Move More initiative was launched in late-2015 and continued to grow in several Schlegel Villages through 2016. The concept is simple: encourage residents and team members to find ways to get up and get moving throughout the day. It’s not about scheduled exercise programs but more about finding ways to increase the amount of regular activity that occurs throughout the day: encouraging someone to walk more often; grabbing a partner for a spontaneous dance-off; standing up to stretch after an extended time sitting.

RIA research application specialist Lora Bruyn Martin spent much of the year directly in the Villages working with Move More champions to share the concept with teams and residents, and collecting data to help assess the initiative’s impact. Anecdotally, there were many signs that the concept is taking off.

“What makes me most excited is when I hear people, mostly team members, say ‘we’re moving more’ when they take the stairs or walk at lunch,” Lora says. “That tells me that the message is getting out.”

“I hear pride in residents’ voices when their functional capabilities have improved,” she adds, “and I hear team members say that spending even just a short time dancing in the neighbourhood brightens everyone’s spirits and reduces stress.”

Given the success Move More has had across the Villages, RIA is exploring ways to expand the reach of this initiative and benefit older adults across the sector.
EXPERTS WEIGH IN AT ORAL HEALTH THINK TANK

In the spring of 2016, a multi-disciplinary group of researchers from around the world joined key stakeholders from the long-term care sector to discuss oral health among the residents they serve. Poor oral health can have serious consequences yet a lack of awareness and knowledge can sometimes lessen the importance of oral hygiene in the personal care routines of long-term care.

Hosted by RIA in partnership with the University of Alberta, the Oral Health Think Tank sought to identify existing gaps and define a set of research priorities to help care partners offer better oral health support to long-term care residents.

University professors and researchers sat alongside dental hygienists, nurses, social workers and personal support workers to discuss where time and resources would best be spent in addressing the oral health needs of long-term care residents.

A summary report, now publicly available, highlights the main concerns and three key considerations identified by the group: competing priorities among care providers limiting the amount of time spent focused on oral hygiene; a perceived lack of knowledge among care providers of the importance of oral health; and financial constraints limiting the ability of families and residents to prioritize specialized oral health care.

Moving forward, RIA and its partners are exploring opportunities to address the identified priority issues. By partnering with international experts and key stakeholders, research activities can be focused and accelerated to maximize impact in this much-needed area.
NEW RECIPE RESOURCE FOR HEALTHY AGING

Though much of the research RIA conducts has a long-term care and retirement focus, the organization’s mandate includes improving life quality for all older adults, regardless of where they live.

The Recipe Resource for Healthy Aging, launched in Spring 2016, is a great example of RIA’s efforts to address healthy aging practices for older adults living in community. The guide offers information about the vast amount of nutrient-rich foods harvested in Ontario and a wide selection of recipes to help people prepare wholesome and healthy meals.

The resource was created through the collective efforts of the RIA’s Agri-food for Healthy Aging (A-HA) team, University of Guelph students and several Ontario grower associations. Most importantly older adults contributed their preferences and experience to the development of the resource.

Statistics Canada estimates that more than a third of adults age 65 or older living independently are at nutritional risk, which can be a major factor in the development of chronic diseases in later years.

The resource is a tool to help older adults address these challenges “by ensuring that the majority of their food choices are nutritious and that they get the most nutrients for their calories,” says University of Guelph professor and A-HA research scientist Alison Duncan, who led the resource’s development.

“The challenges can be met by focusing on and celebrating nutrition and making food planning and preparation fun and enjoyable.”

The resource is available electronically on the RIA website at no charge, and hard copies can be purchased on a cost-recovery basis.
LIVING CLASSROOM MODEL TAKING OFF

When it comes to immersive education, the Living Classroom model attracted much attention through 2016. The program, offered by Conestoga College in partnership with Schlegel Villages and RIA, prepares graduates for work in the long-term care (LTC) sector by immersing students in the LTC learning environments at the Village of Riverside Glen in Guelph and Waterloo’s Village at University Gates.

The goal is to inspire graduates to seek future employment in LTC by providing them with an acute understanding of the complex needs of older adults and the person-centred approaches to care that will best serve an aging population.

It’s a model that has guided hundreds of students to success, infusing the LTC workforce with passionate, competent, and confident new graduates. To help other colleges and long-term care homes adopt the Living Classroom model, RIA and the Schlegel Centre for Learning, Research and Innovation in Long-Term Care released a new resource called the Living Classroom Implementation Guide. The goal is to spread this innovative model so more can benefit.

“You can’t get this kind of education in a classroom,” says Sharon Clarke, Conestoga College’s coordinator at University Gates. Other colleges are already catching on, Sharon is consistently welcoming visiting delegations from colleges across Ontario.

The delegations, Sharon says, “are really impressed with how we’ve been so specific with the space and managed to capture everything that’s needed for the program. We’re compact but we have everything the students need.”

The most important aspect of the space, in fact, isn’t the classrooms themselves but the residents upstairs with whom students interact throughout the semester. This is where immersive education flourishes.

“The students gain a lot of confidence,” Sharon says, while the residents have the opportunity to share their experience and help the students understand that being a care partner is about relationships first and foremost.
CHANGING THE CULTURE OF AGING

Early in 2016, RIA and the Schlegel Centre for Learning, Research and Innovation in Long-term Care created an online survey for Ontario long-term care homes focused on the notion of culture change in the sector.

When 769 responses returned, the team recognized a strong desire for continuing and advancing education about how to better support residents in Ontario’s long-term care homes today and into the future.

A first, highly-successful Culture Change Exchange was held in the spring and a second followed in the fall, bringing a range of stakeholders together through an online forum and in person at the Centre of Excellence for Innovation in Aging.

Both events welcomed around 40 speakers, from a range of backgrounds and organizations, sharing the successes and challenges they’ve faced while striving to reach their culture change goals. Schlegel CLRI culture change project officer Kate Ducak says this notion of collaborative knowledge exchange was the central benefit received by participants from around the globe.

“For some, culture change aligns with what they’ve always been doing, working toward or wanting to do,” Kate says, “but they didn’t realize there are growing Canadian and international movements with other people, forums and resources they can actively learn from and collaboratively work together with.”

The emerging Walk with Me network is a great example of this. In 2016, RIA co-hosted the 2nd national Walk with Me conference in Edmonton, Alberta bringing over 350 delegates from across the country together to accelerate and profile this social movement. The revenue earned from this highly successful event will allow the network to deepen its roots and grow. An official network launch is planned for the 2018 Walk with Me conference in Niagara Falls.

By creating the space for shared learning and collaboration, we are transforming the way we age in Canada so all older adults can live life fully.
PROJECTS ON THE GO

In 2016, RIA had 22 projects on the go, 8 of which were new to the roster. A few key projects are highlighted below:

Expanding the Core Heart Team concept within and beyond Schlegel Villages
*Project Lead: Dr. George Heckman*

This ongoing project involves accelerating a pilot intervention to improve heart failure management in long-term care. By supporting all members of the long-term team in the detection, diagnosis, and management of this chronic condition, better care and quality of life is possible.

CHOICE: A relationship-centred mealtime training program for long-term care
*Project Lead: Dr. Heather Keller*

CHOICE is a training program designed to support relationship-centred dining in long-term care and improve the mealtime experience. This pilot project helped the team understand the best way to deliver the CHOICE program and implement relationship-centred practices at mealtimes, resulting in a new and improved version called CHOICE+.

Neighbourhood Team Development: Promoting resident centredness in long-term care
*Project Lead: Dr. Veronique Boscart*

This study is the first of its kind to examine the relationship between resident-centred models of living and both qualitative and quantitative outcomes. Data analysis is underway to help us better understand how these models can improve quality of life and lead to the development of a supporting community where everyone thrives.

Exploring why PSWs decide to manually transfer a resident
*Project Lead: Dr. Andrew Laing*

This project helped increase understanding of the factors that contribute to a personal support worker (PSW)'s decision to transfer a long-term care resident manually or with assistance. We can use this information to develop targeted training programs and reduce the risk of serious injury when PSWs help to transfer residents.
The effects of second wave feminism on women’s spirituality

Project Lead: Dr. Marianne Mellinger

This project wrapped up in 2016 and explored the spirituality and spiritual expression of women born during the first decade of the baby-boom generation (1946-1955). The information gathered will help spiritual caregivers plan for the future and better support the spiritual needs of this cohort.

Improving Memory Care through Better Assessment and Education

Project Lead: Dr. Linda Lee

The purpose of this ongoing project is to expand the successful interprofessional Memory Clinic model developed by Dr. Linda Lee to build capacity within the primary care setting. At the end of 2016, 90 clinics were up and running across Ontario.

SELECT PUBLICATIONS

In 2016, RIA’s lead researchers contributed 98 publications to the academic literature. A select few are featured below:


SELECT PUBLICATIONS, CONTINUED


ADVANCING TECHNOLOGY FOR INDEPENDENT LIVING

RIA’s areas of expertise are growing with the addition of Dr. Jennifer Boger, Schlegel Research Chair in Technology for Independent Living. For more than a decade, Dr. Boger has been exploring the use of technology to enhance the health, well-being, and independence of older adults. Her passion stems from her experience with her grandmothers, one of whom lived with early onset Alzheimer’s disease. Although both had very different journeys, Dr. Boger saw first-hand the need for tools and resources to better support their changing needs and the needs of those who supported them. She saw the immense opportunity for technology to address this gap. To date, Dr. Boger has created internationally renowned assistive technologies in collaboration with researchers from many disciplines and most importantly with older adults, their families, and their circle of care. In her new role, she will explore cognitive computing to connect care partners of people living with dementia to resources and support, and develop new technologies to foster connections between older adults and younger generations.
SPIRITUALITY AND AGING PROGRAM WELCOMES JANE KUEPFER

RIA welcomes Jane Kuepfer as the new Schlegel Specialist in Spirituality and Aging in partnership with Conrad Grebel University College. Jane has extensive experience as a spiritual care partner in long-term care and community. She is a registered psychotherapist, and an ordained Minister in both the Mennonite Church and United Church of Canada. She has an MDiv from Emmanuel College, Toronto School of Theology, and a BA from University of Waterloo. Jane is currently completing a doctorate in Spiritual Care and Psychotherapy at Waterloo Lutheran Seminary. As part of her new role, Jane will coordinate the annual Spirituality and Aging Seminar, which takes place each November. She will also conduct research, and teach graduate courses in the area of Spirituality and Aging.

DR. RICH HUGHSON APPOINTED FELLOW OF THE CANADIAN ACADEMY OF HEALTH SCIENCES

Schlegel Research Chair Dr. Rich Hughson was named a Fellow of the Canadian Academy of Health Sciences this year. Fellows elected to this national collaboration are recognized internationally for their contributions to the promotion of health science and have demonstrated leadership, creativity, and commitment to advance health science research. As a world authority on the cardiovascular health effects of spaceflight and how these changes parallel aging here on earth, Dr. Hughson was a natural candidate. He was one of 36 individuals to be accepted into the academy in 2016. Congratulations to Dr. Hughson!

WISHING MARIANNE MELLINGER WELL ON HER RETIREMENT

After a decade of service, Marianne Mellinger retired from her role as lead of RIA’s Spirituality and Aging theme area at Conrad Grebel University College. Marianne was instrumental in advancing research related to spirituality in later life and planning and delivering the always well-attended Spirituality and Aging Seminar each Fall. Marianne also led the development of a Multi-faith Resource Guide, which has helped team members in long-term care to better support residents and families from different faiths.

We thank Marianne for all of her efforts to explore and support spirituality as it relates to aging, and wish her all the best in her retirement.
Dr. Michael Sharratt, former President of the RIA (2006 – 2016) and known to most as Mike, passed away on December 23, 2016. In these 10 years, he worked alongside RIA founder and long-time friend, Ron Schlegel, to realize Ron’s vision. RIA grew from an idea to a unique-in-the-world infrastructure and Centre of Excellence for Innovation in Aging.

As President of RIA, Mike devoted his time, wisdom and passion to building a strong foundation for future success. He was instrumental in recruiting seven Schlegel Research Chairs as well as several affiliate researchers and a strong staff team. He continued to build RIA’s capacity to support and generate high-quality research as a mentor to many researchers and students. This mentorship and unwavering support also extended to the RIA staff team. His door was always open.

Mike also had a passion for health promotion and physical activity. He was a driving force behind a number of initiatives that provided the support and resources to help older adults move more. There is no better example of his exceptional work on this front than the Michael T. Sharratt Program for Active Living. This signature program for older adults brings together Mike’s passions for research, physical activity, education and healthy aging.

Prior to his RIA tenure, Mike was a faculty member at the University of Waterloo for 33 years (from 1974 to 2007). He was appointed dean of the Faculty of Applied Health Sciences in 1998 and reappointed through 2005. He also spent many years as an international wrestling official including two Olympic Games, dozens of world championships, and was inducted into the Canadian Amateur Wrestling Hall of Fame in 1994.

Mike had an exceptional life and his accomplishments were many. He was driven and ambitious, and at the same time caring and collaborative. He was truly a great man, and we miss him deeply.
A print of Picasso’s Don Quixote, illustrating the courageous Spanish knight and his faithful side kick, hung proudly in Mike’s office. Mike had great respect for Quixote’s passion and commitment to righting wrongs. Mike, like Quixote, fought for what he believed in. He unfailingly stood up for what he believed was right. Mike, like Quixote, also looked for the best in people. He saw strengths even when others could not see them. He believed in giving people a chance even if others had given up on them. Just as Quixote inspired Mike, Mike will always be an inspiration to us. A plaque showcasing this print now hangs in the Ideas Café at the Centre of Excellence to honour Mike’s legacy.
STRATEGIC AIM 01
Achieve global prominence through a growing reputation of innovation driven by a model of incubation-acceleration-mobilization

RIA lead researchers and their teams presented at events in 11 countries

STRATEGIC AIM 02
Drive innovation by attracting and developing a critical mass of world-class leaders in aging research and practice development

2 new Schlegel Research Chairs: Dr. Jennifer Boger (Technology for Independent Living) and Dr. Linda Lee (Primary Care for Elders)

STRATEGIC AIM 03
Make scientific and programmatic contributions to the integration of research and practice

197 presentations by RIA lead researchers and their teams to share research and promote best practices

STRATEGIC AIM 04
Drive culture change in aging across Canada through leading the establishment of a national hub and network

350+ attendees at Walk with Me 2016

STRATEGIC AIM 05
Make ground-breaking contributions to the establishment of living classrooms where living, learning, and care are fully integrated

NEW!
Living Classroom Implementation Guide published and freely available online
$637K provincial government investment annually for the Schlegel Centre for Learning, Research, and Innovation in Long-Term Care

82,685 page views on the RIA website, up 13% since 2015

209 new Twitter followers

472 likes on Facebook

1 new Schlegel Specialist: Jane Kuepfer (Spirituality & Aging)

98 publications by RIA lead researchers to advance knowledge

$7.3+ million in grants received by RIA lead researchers and their teams

90 memory clinics up and running across Ontario thanks to Dr. Linda Lee

14 member organizations and 8 strategic/academic partners from across North America came to RIA for the annual Seniors Quality Leap Initiative meeting

48 long-term care homes/organizations from across Ontario participated in our 1st culture change focused webinar

400+ participants at Culture Change Exchange events

125 graduates from Living Classrooms

NEW! Living Classroom website launched
Complete audited statements are available upon request. Please contact info@the-ria.ca.

**SUMMARIZED STATEMENT OF FINANCIAL POSITION AS AT DECEMBER 31, 2016**

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<td>387,361</td>
<td>378,422</td>
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<td>Capital fund</td>
<td>6,325,174</td>
<td>5,915,265</td>
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<tr>
<td></td>
<td><strong>6,941,606</strong></td>
<td><strong>6,405,899</strong></td>
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<tr>
<td></td>
<td><strong>$7,619,359</strong></td>
<td><strong>$7,398,717</strong></td>
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<tr>
<td>Revenue</td>
<td>2016</td>
<td>2015</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Donations</td>
<td>$1,324,168</td>
<td>$2,343,110</td>
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<tr>
<td>Research</td>
<td>1,172,751</td>
<td>923,060</td>
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<td>Rental income</td>
<td>211,484</td>
<td>49,850</td>
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<tr>
<td>Conference and training</td>
<td>210,886</td>
<td>28,373</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>35,981</td>
<td>32,628</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$2,955,270</strong></td>
<td><strong>$3,377,021</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant and research fees</td>
<td>$975,788</td>
<td>$748,704</td>
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<tr>
<td>Wages and benefits</td>
<td>888,844</td>
<td>762,653</td>
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<tr>
<td>Amortization</td>
<td>129,687</td>
<td>72,925</td>
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<td>Rent and utilities</td>
<td>118,151</td>
<td>70,546</td>
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<td>Office</td>
<td>74,765</td>
<td>102,783</td>
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<tr>
<td>Janitorial</td>
<td>72,978</td>
<td>–</td>
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<tr>
<td>Travel</td>
<td>56,081</td>
<td>34,197</td>
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<tr>
<td>Conference and training</td>
<td>34,242</td>
<td>5,623</td>
</tr>
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<td>Legal and audit</td>
<td>19,541</td>
<td>13,855</td>
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<td>Advertising</td>
<td>18,349</td>
<td>15,393</td>
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<td>Sponsorships</td>
<td>12,116</td>
<td>27,750</td>
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<tr>
<td>Insurance</td>
<td>9,142</td>
<td>7,741</td>
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<td>Professional development</td>
<td>7,225</td>
<td>3,845</td>
</tr>
<tr>
<td>Bank charges and interest</td>
<td>1,926</td>
<td>1,577</td>
</tr>
<tr>
<td>Communications</td>
<td>728</td>
<td>–</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$2,419,563</strong></td>
<td><strong>$1,867,592</strong></td>
</tr>
</tbody>
</table>

**Excess of revenue over expenses**  
$535,707  
$1,509,429
2016 marked a number of changes for RIA – the launch of a new and ambitious strategic plan, a restructuring of the team, and an examination of our impact. The reflection, discussion and planning that took place over the past year has better prepared us to capitalize on today’s curiosity and drive tomorrow’s innovations.

RIA enlisted an evaluation consultant to help us begin the process of defining our impact. As a team, we were pushed outside of our comfort zones to really articulate and define how our efforts fulfill our mission and enhance quality of life and care for older adults.

We could all agree on the ‘why’ – we want to make a difference in the lives of older adults across the continuum of care, across the province, the country, and around the world. But we needed to clarify and gain consensus as an organization on the ‘how’ - how can we most effectively tap into curiosities and promising ideas, support their growth and exploration, and ultimately advance innovations that will make the difference?

We are still working on the answer to this question, but we have made some significant progress over the course of 2016. Together with the consultant, we mapped out our priorities and the impacts we are striving for, creating our Theory of Change. We brought our extended team together (staff team and researchers) to formulate this map, which deepened our understanding of each person’s role and contributions in achieving our mission.

This process of putting all our cards out on the table around what we do and why it matters brought some difficult discussions, but the results were so worth it. Those frank, honest conversations brought cohesion and consensus, and a clearer path for the road ahead in achieving our 2016-2020 aims.
With our Theory of Change in place, and an evaluation framework in the works, we are well-positioned to realize our goals. However, a crucial contributor to our success is the ongoing support of our partners and donors, and the cultivation of new connections. Recognizing this need, we are actively growing the following key areas:

- **Research to Practice: $200K needed**
- **Engagement: $100K needed**
- **Education & Awareness: $75K needed**

To make a donation and support RIA’s initiatives to enhance quality of life for older adults, please visit us online at www.the-ria.ca/get-involved/donate.

### KEY FUTURE INITIATIVES

- Supporting the spread of the Living Classroom model to new partners across the province and beyond
- Hosting the 3rd Walk with Me conference in Niagara Falls, Ontario and officially launching the national Walk with Me network
- Finalizing our organizational evaluation framework and measuring RIA’s impact
- Advancing education and training opportunities for care partners across the continuum of care
- Launching the “Learning Lunch” series where residents, community members and researchers exchange ideas on key topics
- Kicking off a new capital campaign as we prepare to grow by 3 floors!
- Growing our team to match the growing demand for our services
- Advancing research and knowledge generation across RIA’s research and practice development programs

### THE INNOVATORS

We’d like to acknowledge the following organizations – the Innovators – who have supported RIA in the development of our new home at the Centre of Excellence for Innovation in Aging, and ultimately advancing research and innovation to enhance care and quality of life for older adults:

- Cardinal Health Canada
- Complete Purchasing Services Inc.
- Remedy’s Specialty Pharmacy
- SCA
- The Cowan Foundation
RIA sincerely thanks our valued donors who have generously given in support of our mission. Listed below are the donors whose gifts were received from January to December 2016.

VISIONARY
- Dr. Ronald and Barbara Schlegel and Family

FOUNDING PARTNERS
- University of Waterloo
- Conestoga College Institute of Technology and Advanced Learning

LEADER
(1,000,000+)
- McMaster University

INNOVATOR
($500,000 - 999,999)
- Cardinal Health Canada
- Complete Purchasing Services Inc.
- Remedy’s Specialty Pharmacy
- SCA
- The Cowan Foundation

ACCELERATOR
($25,000 – 99,999)
- Medical Mart Supplies Ltd.

MOBILIZER
($10,000 – 24,999)
- Kitchener Glass Ltd.

FRIEND
($1,000 – 9,999)
- Anonymous
- Josie and Francis d’Avernas
- Richard Hughson
- Ford Keast LLP
- Leading Edge Hospitality Group Inc.
- Marlene Raasok
- Strassburger Windows and Doors Ltd.
- Ernie and Joyce Schlegel
- Rob Schlegel
- Jaqueline and Michael Sharratt
- James Sutherland
- Werner Schmidt
- Wellings Planning Consultants Inc.
SUPPORTER
(UP TO $999)
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• Anonymous
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• Elizabeth Dietrich
• Frank and Virginia Dietrich
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• Dianne Ditner
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• Karl and Donna Riddiough
• J. Gordon Riedlinger
• Roberta Ritchey
• J Gordon Ross
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Patricia Beaupre, Leonora Duench, Winnifred Johnson, Ruth McArthur, Shirley Potter, Michael Sharratt, James Snelgrove, Maria White, Gail Wismer and Lily Lansdale.
We’re curious. We explore.  
We try new things. Some work, some fail.  
But most importantly, we share.  
We share the innovations that make a difference.  
We share to benefit older adults everywhere.

The Research Institute for Aging (RIA) is a charitable foundation dedicated to enhancing care and quality of life for older adults.