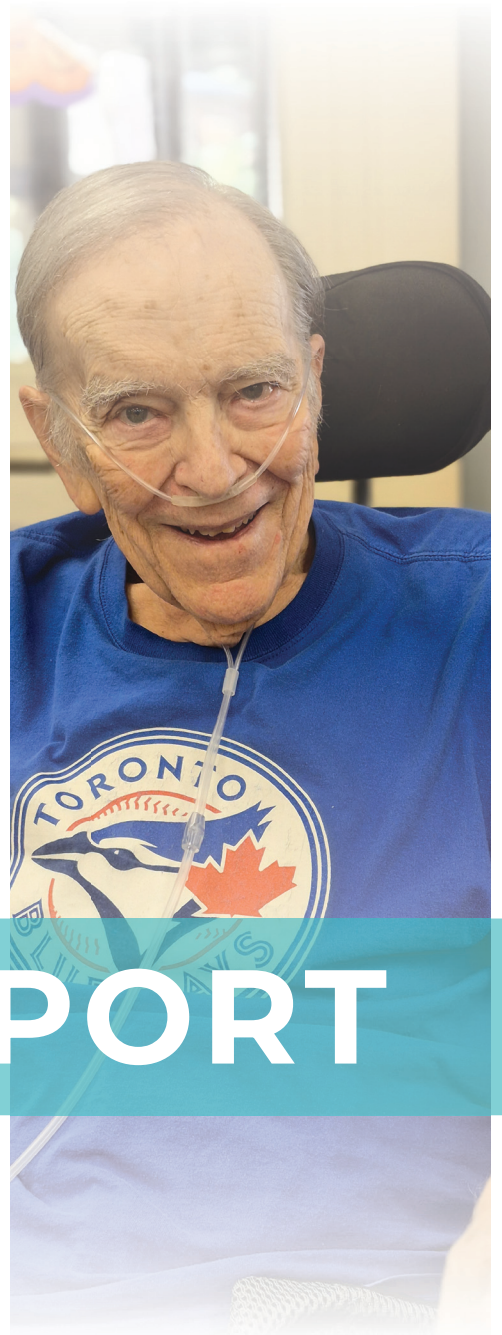


*Caring is Our
Reason for Being...*



2025-26

ANNUAL REPORT

IOOF
SENIORS HOMES INC.



The IOOF Seniors Homes Inc. has been serving the needs of seniors in Ontario for over 100 years. The organization is committed to caring for seniors through the development of new and innovative concepts in support programs, health care services, and housing initiatives.

A not-for-profit charitable organization currently operating several facilities in Barrie, Ontario, the organization provides a full continuum of care for seniors from independent living to supportive housing, rent-gear-to-income housing, and long-term care.

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STRATEGIC PRIORITIES



We are committed to the philosophy of Resident First: A culture of ongoing quality, caring, and improvements to meet the changing needs of our residents.



We recognize that “Individually we are one drop, but together, we are an ocean.”



We recognize that communities grow stronger when its citizens (residents, staff, stakeholders) regularly and persistently do a variety of simple things together that allows them to connect with each other, build trust, and get involved.



We are committed to partnering with the Ministry to renovate our facility to provide our residents with secure, safe, and comfortable surroundings.



We acknowledge the importance of addressing sustainability for an aging population and for increased demand for long term care.

*Caring is Our Reason
for Being...*

OUR CARE VALUES:

Compassion

We are committed to providing compassionate care and comforting support that values the strengths, needs, and desires of those we serve.

Accountability

We are committed to acting with integrity and to using our services and resources in a responsible, accountable, and transparent matter.

Respect

We are committed to upholding residents' rights and respecting diversity. By embracing our differences and supporting others we demonstrate fairness, inclusion, and equality.

Excellence

We are committed to providing the highest quality of care and service through innovation, teamwork, best practices, and working co-operatively.



A MESSAGE FROM OUR CEO

It is with great pride and deep gratitude that I share this message reflecting on a truly remarkable year for the IOOF Seniors Homes Inc.

By every measure, this past year stands among the most successful in our organization's history. The quality of care we deliver, the strength of our operations, and the trust placed in us by residents and their families have all reached new heights. We didn't just meet expectations — we exceeded them. That success belongs to every person who brings dedication, compassion, and professionalism to the residents we serve. This annual report will highlight many of our achievements.

One of the most significant milestones this year was the launch of our Long-Term Care Redevelopment Project. This transformative undertaking reflects our unwavering commitment to providing the highest standard of living and care for the residents we serve. It represents an investment in modern, purpose-built spaces and a reaffirmation of our promise to every resident who calls the IOOF their home.

None of this would be possible without the people who make our mission real every single day.

To our Board of Directors — Thank you for your thoughtful leadership and strategic guidance. Your counsel has been invaluable, and your trust gives our team the foundation to move forward with confidence.

To our Management Team — Your ability to navigate challenges, inspire those around you, and keep organizational priorities front and center has been exceptional. You lead with purpose, and it shows.

To our Staff — You are the heart of the IOOF Seniors Homes. Day after day, you show up with kindness, skill, and genuine care for every resident. The relationships you build, the comfort you provide, and the dignity you uphold are the true measures of our success. We are deeply grateful for each of you.

Our mission, **“Caring is our Reason for Being”**, is not just a statement. It is a commitment lived out in every interaction, every decision, and every act of service.

As we look to the year ahead, we do so with excitement, gratitude, and an enduring sense of purpose. Thank you for your continued support of the IOOF Seniors Homes Inc.

Garry C. Hopkins
CEO



A MESSAGE FROM OUR BOARD CHAIR

Our redevelopment is officially underway, and the momentum is real. This marks an exciting new chapter for our Long-Term Care Home and the broader continuum of care we provide. New spaces, additional beds, and the renovation of our oldest rooms — together, these represent a remarkable milestone for IOOF Seniors Homes Inc. The future looks bright.

Work on renewing the Heritage Place corridors is also in progress. As funding becomes available, we look forward to advancing this important development further.

To our Staff — What you do every day is extraordinary. You show up, face challenges head-on, and consistently go above and beyond for the people in your care. Your resilience and dedication are the backbone of this organization. Please never underestimate how much your work matters. Thank you, sincerely.

To our Residents — We are so glad you call the IOOF home. Your presence shapes our community in ways that go far beyond words. Thank you for being such an important part of who we are.

To the Families of our Residents — Thank you for trusting us with the care of someone you love. That trust is something we take seriously every single day. We are committed to maintaining the highest standard of care, and we genuinely value the feedback you share through our Resident Satisfaction Surveys.

To Garry Hopkins, our CEO, and our Directors and Managers — Your leadership this past year has been exemplary. You have gone above and beyond, and it has not gone unnoticed. On behalf of myself and the entire Board of Directors, thank you for your dedication and hard work.

To our Board of Directors — A heartfelt thank you to this passionate, knowledgeable, and committed group of volunteers. Your dedication to strong governance keeps this organization moving in the right direction. We are grateful for everything you contribute.

As we move forward, IOOF remains focused on delivering the best possible care and services to everyone we serve. The construction and updates ahead will transform our facility into a true flagship within the province — modernized, refreshed, and built with our residents in mind.

Here's to a dynamic year ahead for our entire community.

John Nichols
BOARD CHAIR

BOARD OF DIRECTORS



With appreciation, we thank the following individuals who served on IOOF Seniors Homes Inc. Board of Directors in 2025-2026:

FRONT:

Jim Edwards
Gene Dopp
(Vice Chair)
June Ritchie
(Secretary)
Gwen Barron
Janice Marshall
Doug Jure

BACK:

John Nichols
(Board Chair)
Garry Hopkins
(CEO)
Ian Hunter
Mark Volkov
Ian Chadwick
Bob McMahon

MISSING FROM PHOTO: Marlene Travis, Phil Benson

OUR TEAM

MANAGEMENT

CEO	Garry C. Hopkins
Director of Finance & IT	Myles Keeble
Director of Resident Care	Rhonda Kapogianis
Assistant Directors of Resident Care	Lindsey Webb, Peggy Sauve, & Jane Walker
Director of Human Resources	Valerie Bennett
Director of Facilities & Environment	Shean Wadham
Manager of Environmental Services	Lisete DaSilva
Director of Housing & Nutrition Services	Mary Holm
Manager of Nutrition Services	Gosia Briegmann
Director of Quality, Risk & Programs	Gaja Damas
Manager of Program Support & Volunteer Services	Cara Chimienti
Property Manager	Elvis Pohl
Capital Campaign Manager	Elyse Martin

ADMINISTRATIVE STAFF

Payroll & Benefits Administrator	Barb Scott
Scheduling Administrators of Resident Care	Laurissa Rossi & Niki Campbell
Resident Care Administrative Assistant	Tracey Lintott
Resident Care Education Coordinator	Gillian Van Iderstine
Infection Prevention & Control Lead	Alecia Lewis
Administrative Assistant of Nutrition Services	Evelyn Villagran
Administrative Assistant of Housing Accommodations	Irene Delisle
Executive Administrative Assistant	Cathie Foley
Home Administrative Assistant	Kelly Young
Terraces Administrative Assistant	Jessica Rogers
Resident Accounting Administrator	Bonnie Gowanlock
Accounting Administrator	Stephanie Hopkins
Human Resources Assistant	Deanna Risi
Graphic Designer & Revenue Development Assistant	Jill Sliter
Systems Administrator & IT Support	Nicolas Blouin

HUMAN RESOURCES

This year marked significant progress across multiple organizational priorities, with a strong focus on workforce stability, employee well-being, and fostering an inclusive workplace culture.

LGI PAYROLL SYSTEM

A new scheduling system was implemented to improve efficiency, transparency, and staff satisfaction. In addition, a comprehensive Time and Attendance system featuring facial recognition technology was introduced, enhancing accuracy, accountability, and day-to-day workforce management processes.



MENTAL HEALTH

Employee well-being remained a priority throughout the year. 29 front-line staff attended The Working Minds workshops, providing valuable tools and resources to support mental health awareness and resilience in the workplace.

ATTENDANCE SUPPORT PROGRAM

The Attendance Support Program was revised to better support employees and leaders. The updated program now includes two structured review periods, replacing the previous ad hoc approach. This change ensures greater consistency, fairness, and proactive engagement in attendance management.

ONTARIO HEALTH RECRUITMENT & RETENTION INCENTIVES

The organization actively participated in Ontario Health's Incentive Programs for Personal Support Workers (PSWs), Registered Nurses (RNs), and Registered Practical Nurses (RPNs). In 2025, 11 RPNs and 14 PSWs participated in the program. These initiatives supported recruitment and retention efforts, helping to strengthen the workforce during a period of ongoing healthcare challenges.

INCLUSION & BELONGING

Creating a workplace where everyone feels welcome remained a clear focus. Throughout the year, several important occasions were recognized, including Black History Month, Bell Let's Talk Day, Pride Month, National Day for Truth and Reconciliation, Indigenous Peoples Month, and International Day of Persons with Disabilities.

These initiatives reflect an ongoing commitment to fostering a respectful, inclusive, and supportive workplace where every employee feels valued. The year was marked by progress, innovation, and a continued focus on employee engagement and organizational culture.

FULL TIME
EMPLOYEES

188

PART TIME
EMPLOYEES

96

CASUAL
EMPLOYEES

92

EMPLOYEE RECOGNITION

Staff were proudly recognized and celebrated during CARE Week, which featured a variety of engaging and fun activities, including a staff BBQ and prize giveaways. These events provided an opportunity to show appreciation for the dedication and hard work of team members while fostering connection and morale across the organization.

In addition, a formal Employee Recognition Event was held to celebrate staff milestones, honouring years of service and the valuable contributions of employees. The event highlighted a commitment to recognizing excellence and fostering a culture of appreciation. A total of 49 staff members were celebrated for their tenure with the organization.

These initiatives reflect an ongoing commitment to creating a respectful, inclusive, and supportive workplace where all employees feel valued and empowered.

Overall, the year was defined by progress, innovation, and a continued dedication to supporting employees and strengthening organizational culture.



Years of Service

5 YEARS

Michelle Roote
Todd Langevin
Colbie Thibodeau
Marjel Carruthers
Alison Grant
Jessica Rogers
Cheyanne Readman
Joanna Honman
Anna Kloc
Victoria Dos Santos
Karen Bruce-Bennett
Shauna-Lynn Mallinson

10 YEARS

Amanda Jones
Desiree Ryder
Unice O'Connor
Kelly Young
Christine Brown
Lisa Knox
Tammie Rempel

15 YEARS

Jadine Wolf
Susan Dwyer-Thompson
Kerri Wylde
Lisete Da Silva

20 YEARS

Nadine Rosik
Deb Taylor
Isabelle McCarthy
Eileen Printess

25 YEARS

Maureen Forbes

Congratulations!

In addition to those above, 17 employees received pins for 3 years of service.

BUILDING THE FUTURE OF SENIOR CARE

IOOF SENIORS HOMES BREAKS GROUND ON LONG-TERM CARE HOME REDEVELOPMENT

In February, the IOOF Seniors Homes officially broke ground on our long-term care expansion, and construction is now underway.

The redevelopment will create 64 new and upgraded long-term care beds, bringing our home to a 226-bed facility. This project includes a renovation and new addition to the existing building, designed to modernize the home for today's seniors and future generations.

Completed in two phases, the project is expected to welcome new residents in spring 2028 for phase one and early 2029 for phase two.

The expanded home will offer a more intimate and familiar living environment, featuring private bedrooms, dedicated dining and activity areas, and comfortable lounges for residents and their families.

This project is a recipient under the Capital Funding Program (CFP) and is part of the provincial government's plan to create good-paying jobs and build for the future, while ensuring long-term care residents receive the quality of care and quality of life they deserve.



Mayor Alex Nuttal (City of Barrie), Garry C. Hopkins, CEO (IOOF Seniors Homes), Hon. Natalia Kusendova-Bashta (Minister of Long-Term Care), John Nichols, Board Chair (IOOF Seniors Homes), and MPP Andrea Khanjin (Barrie—Innisfil).

“Our government is improving long-term care by building more homes, hiring more staff and making historic investments to protect families and their loved ones. Today marks a significant milestone for Barrie. Once construction is complete, 130 residents will have a new home where they can receive the care they need, when they need it.”

— **Natalia Kusendova-Bashta, Minister of Long-Term Care**

“For over a century, the IOOF has been dedicated to providing long-term care in Ontario. This collaboration marks an amazing milestone in our organization's history. This endeavour reflects our commitment to enhancing long-term care services and highlights our dedication to fostering a supportive, inclusive community. ‘Caring is our reason for being’ continues to guide us as we uphold our Residents First philosophy.”

— **Garry C. Hopkins, CEO, IOOF Seniors Homes**



WAYS YOU CAN HELP:

Build the future of senior care with IOOF Seniors Homes.

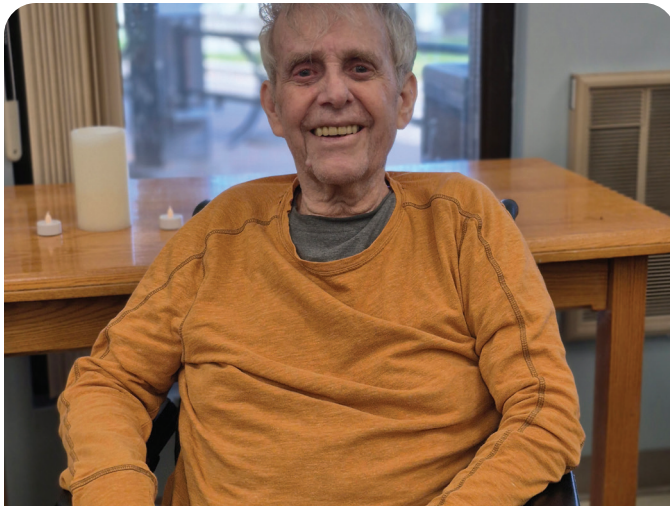
Contact Elyse Martin, Capital Campaign Manager, at 705.728.2389 ext. 315 or emartin@ioof.com.



REVENUE DEVELOPMENT

Sincerest gratitude to our dedicated supporters who contributed and volunteered for the IOOF Seniors Homes and our redevelopment campaign this past year. With your help, we raised \$156,405 for our long-term care and supportive housing home. The start of 2026 has been an exciting time for the IOOF, marked by significant progress on our long-term care home redevelopment project.

Our redevelopment fundraising campaign has reached a major milestone, surpassing \$1.6 million raised for our expansion. To date, the IOOF Seniors Homes has raised \$1,667,919 — representing 83% of our \$2 million fundraising goal.



Long-Term Care Resident Howard Roche

2025 HOLIDAY APPEAL

Our annual holiday appeal raised \$14,605 — thank you to everyone who gave during the holiday season. One story that captured hearts this year is that of Howard Roche and his daughter Sheila, a multi-generational family who both call the IOOF home. Despite their complex health needs, our care team kept them together on the same floor, where they share meals, enjoy recreational programs, and spend meaningful time together. Howard, a former competitive gymnast and marathon runner, was always cheered on by Sheila. Today, they continue sharing those moments as they navigate their health challenges side by side. Keeping families together is central to our Resident First philosophy.

EMPLOYEE GIVING PAYROLL DEDUCTIONS PROGRAM

Our staff's generosity continues to grow. In 2025, employees contributed \$10,675 through our payroll giving program — a 30% increase from the previous year. In total, staff giving has raised over \$41,000 for the redevelopment project. We are deeply grateful for their ongoing commitment, whether through payroll contributions, event volunteering, or raffle and auction participation.

20TH ANNIVERSARY OF THE YOUNG AT HEART CHARITY MOTORCYCLE RIDE

Thank you to our generous sponsors, donors, riders, and volunteers who helped celebrate the 20th anniversary of the Young at Heart Charity Motorcycle Ride on August 23, 2025. In partnership with Barrie Harley-Davidson, we raised over \$27,000 toward redeveloping our long-term care home. This annual event brings together residents, families, and riders to raise much-needed funds for long-term care and seniors' health care.



YOUNG AT HEART RIDE 2025 SPONSORS



Cambridge Lodge #188

Harmony Lodge #115

Aurora Lodge #148

Maple Leaf Lodge #57



2025 DONORS

January 1st to December 31st, 2025

\$500-\$999

Anonymous
 Gail Benoit
 Currie Truck Centre
 Elevator One Inc.
 Faith Rebekah Lodge #84
 Home Care Assistance of Barrie/
 Simcoe County
 IBEW LOCAL 353
 IOOF Empire Lodge #87

IOOF Loyal Orange Lodge #432
 IOOF New Horizon Rebekah
 Lodge #391
 Kiwanis Club of Barrie
 Leslie Consulting Group Ltd.
 Midhurst Roofing Ltd.
 Plumbtech Plumbing Inc.
 Eleanor Poole
 Roger LeBlanc

Rotary Club of Barrie-Huron
 David Steele
 Malcolm Summers
 Surelock Homes Ltd.
 Surge Learning Inc.
 Nick Van Der Gulik
 VersaNet Solutions Group

\$1,000-\$4,999

Anonymous
 Donald & Susan Barr
 Caring Hands 4U Staffing
 Services
 Estate of Jean Alethea Dodds
 Robert Goodfellow
 Heritage Place Residents
 Association
 Independent Order of Odd
 Fellows
 IOOF Aurora Lodge #148

IOOF Harmony Lodge #115
 IOOF Maple Leaf Lodge #57
 IOOF Peachland Rebekah Lodge
 #45
 IOOF Union Lodge #16
 IOOF Valley City Lodge #117
 Claude Larin
 LiUNA LOCAL 183
 Jack & Cindy McAllister
 Mike McKean

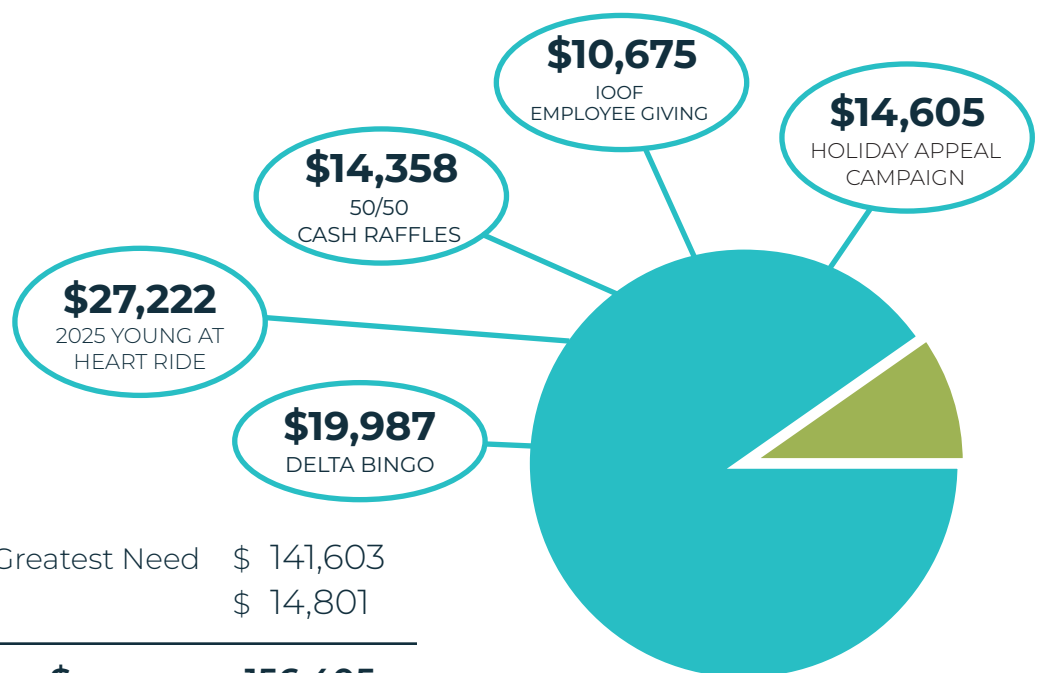
Herb & June Ritchie
 Rotary Club of Barrie
 Royal ProResp Inc.
 S.J. Landscape
 Gerald & Marilyn Smith
 Laura Sutherland
 The Barrie Citivan Club Inc.
 United Way Halton & Hamilton

\$5,000-\$9,999

Anonymous
 Heritage Place Chapel Fund
 Rebekah Assembly of Ontario

\$10,000-\$19,999

Delta Bingo & Gaming



■ Redevelopment/Area of Greatest Need	\$ 141,603
■ Specified Funds	\$ 14,801

TOTAL REVENUE: \$ 156,405

ODD FELLOW & REBEKAH LONG-TERM CARE HOME

The Resident Care Team is led by the Director of Resident Care and three Assistant Directors of Resident Care. The Nursing Leadership Team is committed to improving residents' quality of life through evidence-based best practices, collaboration, advocacy, and resident-centred care.

Working alongside a dedicated interdisciplinary team — including Personal Support Workers, Registered Practical Nurses, Registered Nurses, and a Nurse Practitioner — the Nursing Leadership Team fosters a culture of effective communication, ongoing education, and teamwork. Together, they deliver compassionate, respectful, and high-quality care that supports the best possible outcomes for residents.



STABILIZING STAFFING

To address excessive overtime and rising agency costs caused by inconsistent staffing practices, the Nursing Leadership Team introduced a minimum staffing plan. This plan establishes clear guidelines for filling vacancies within the Resident Care Department and has produced measurable results. The Home has significantly reduced both overtime and agency staffing costs. As of January 2026, agency staff are no longer used to fill Personal Support Workers (PSWs) vacancies, and reliance on agency Registered Nurses (RNs) and Registered Practical Nurses (RPNs) has been substantially reduced.

Alongside the staffing plan, the team has made strong progress in recruiting and retaining staff for permanent full-time and part-time positions. This success reflects a combination of hiring incentives for new graduates, a thorough orientation program, ongoing staff support, and a collaborative, best-practice workplace culture.

The Resident Care Team also converted temporary 12-hour RPN shifts across two home areas into permanent positions. The blend of 12-hour and 8-hour shifts has been well received by staff, offering greater scheduling flexibility and supporting work-life balance. Residents have also benefited — greater staffing consistency and reduced dependence on agency personnel have contributed directly to improved care quality.

MEDICAL PROGRAM

The Medical Program is led by the Medical Director and includes four Physicians and a full-time Nurse Practitioner. The team works closely with external partners — including Royal Victoria Regional Health Centre and its Nurse Practitioner-Led Outreach Team (NLOT), North Simcoe Muskoka Geriatric Services, the Registered Nurses' Association of Ontario (RNAO), and other community organizations — to support optimal health outcomes and quality of life for residents.

SPECIAL PROJECTS

The Resident Care Team remains committed to advancing care quality through targeted quality improvement initiatives.

REDUCING EMERGENCY ROOM TRANSFERS

One key initiative focuses on reducing unnecessary emergency room transfers. Through the use of evidence-based clinical pathways and ongoing staff education, the team supports earlier symptom recognition, timely intervention, and meaningful goals-of-care conversations that reflect resident preferences and choices.

The Home continues to collaborate with a network of external partners, including the North Simcoe Muskoka Hospice Palliative Care Network, Royal Victoria Regional Health Centre's Geriatric Emergency Management Nurse and NP-Led Outreach Team, Ontario Health Team, Waypoint Centre for Mental Health Care – Horizons, Behavioural Supports Ontario, and RNAO.

PURPOSEFUL HOURLY ROUNDING

A second key initiative is the implementation and ongoing sustainability of Purposeful Hourly Rounding. Consistent purposeful rounding has demonstrated measurable benefits: reduced falls and injury severity, improved pain management, better continence and skin integrity, stronger resident trust in staff, and enhanced overall quality of life.

As a Best Practice Spotlight Organization for Falls Prevention, the Home expects all staff and departments to actively participate in best-practice initiatives. Education and support for purposeful rounding have been extended across all departments. Increasing direct resident care hours is expected to further strengthen outcomes, including fewer falls, improved skin integrity, reduced pain, and greater resident satisfaction.

INFORMATION TECHNOLOGY

The Resident Care Department continues to implement RNAO Clinical Pathways integrated within the PointClickCare software system. These evidence-based pathways are embedded into frontline staff assessments and provide clinical recommendations, guidance, and care planning interventions that support consistent, resident-centred care. To date, the Clinical Pathways Program has improved care quality, enhanced regulatory compliance, increased staff efficiency, and reduced errors.



In early 2026, the Home introduced the Medisystem Collaborative Medication Reconciliation (MCMR) service through its contracted pharmacy provider. This service supports medication reconciliation for resident admissions and readmissions. Previously performed by nursing staff, these comprehensive medication reviews are now completed by the pharmacy team — reducing nursing workload and lowering the risk of errors associated with complex reviews and competing clinical demands. The change allows nurses to dedicate more time to direct resident care.

CONTINUOUS QUALITY IMPROVEMENT

The Home continues to partner with RNAO to implement the Clinical Pathways Program, grounded in evidence-based best practices and designed to improve resident care quality. Given that residents admitted to long-term care often present with complex health needs, clinical pathways equip nurses with the tools to support safe, consistent, and effective care delivery.



The following clinical pathways have been implemented:

- Admission Clinical Pathway
- Delirium Clinical Pathway
- Resident and Family-Centred Care Framework
- Pain Clinical Pathway
- Falls Clinical Pathway

The Palliative and End-of-Life Care Clinical Pathway is scheduled for implementation in Summer 2026.

The RAI Coordinator monitors and reports Canadian Institute for Health Information (CIHI) Quality Indicators as the Home works to exceed provincial averages. The RAI Coordinator also submits Enquire data related to RNAO Clinical Pathways to track quality improvements tied to pathway implementation.

The RAI-MDS upgrade was fully implemented on January 1, 2026. Education on the associated changes was provided to all registered staff, and ongoing support continues for both current employees and new hires during onboarding.



INFECTION PREVENTION AND CONTROL

The Home's Infection Prevention and Control (IPAC) Program is focused on protecting residents, staff, and visitors from respiratory and enteric infections while minimizing the duration and impact of outbreaks.

The program includes surveillance, hand hygiene initiatives, environmental cleaning protocols, infection prevention controls, and ongoing education.

The IPAC RPN Lead oversees the program and works collaboratively with all departments to ensure regulatory compliance and promote resident safety.

EDUCATION AND STUDENT PLACEMENTS

The Resident Care Department is well recognized in the community for its strong student support and preceptorship opportunities for Personal Support Worker, Registered Practical Nurse, and Registered Nurse students. The Home continues to receive a high volume of placement requests and remains an active participant in the Ministry-funded Preceptor Resource and Education Program in Long-Term Care.

Positive relationships with local educational institutions — and consistently strong student experiences — have contributed meaningfully to recruitment success and staffing stability.

Staff education opportunities facilitated by the Resident Care Department included:

- Gentle Persuasive Approaches (GPA)
- Working Minds
- RAI-MDS Training
- Acquired Brain Injury Education
- Specialized Wound Care Training for Registered Staff

PALLIATIVE CARE PROGRAM

The Home continues to receive positive feedback from residents, families, funeral homes, and ambulance personnel regarding the Code Dove Honour Guard program, which pays tribute to residents who have passed away. The Honour Guard gives residents, families, and staff a meaningful opportunity to show respect at end of life.

Based on the program's continued positive reception, the Home has expanded the Code Dove tribute to also honour residents who pass away while in hospital.



BEST PRACTICE SPOTLIGHT ORGANIZATION (BPSO) ACCREDITATION

The IOOF Seniors Homes received the prestigious accreditation of Best Practice Spotlight Organization (BPSO), pre-designated by the Registered Nurses' Association of Ontario (RNAO). This designation is a true honour and shows our dedication to upholding our commitment to excellence in resident care and organizational performance.

The IOOF care team attended the inaugural BPSO Global Summit hosted by RNAO and joined professionals from around the globe to learn best practices at the point-of-care for long-term care residents.



Pictured: Our IOOF care team at the 2025 BPSO Global Summit joined by Deborah Richardson, Deputy Minister of Health, and Dr. Doris Grinspun, Chief Executive Officer of the Registered Nurses' Association of Ontario (RNAO).

Odd Fellow & Rebekah Long-Term Care Home

STATEMENT OF FINANCIAL ACTIVITIES

TOTAL REVENUE: \$ 23,415,094

■ Ministry Funding	\$ 18,003,970
■ Resident Rental & Other Income	\$ 4,596,217
■ Miscellaneous Revenue	\$ 730,604
■ Amortization	\$ 84,303

TOTAL EXPENSES: \$ 23,851,544

■ Salaries & Benefits	\$ 18,739,852
■ Building & Property	\$ 732,522
■ Supplies & Other Expenses	\$ 2,830,365
■ Corporate Allocations	\$ 714,654
■ Interest on Long Term Debt	\$ 285,772
■ Amortization Expense	\$ 548,379

NET REVENUE: \$ (436,450)

HERITAGE PLACE & THE TERRACES

The Housing Accommodations Department supports independent and comfortable living for residents at both Heritage Place at 20 Brooks Street, and The Terraces at Heritage Square on Dean Avenue. Through a range of targeted programs and services, the department promotes resident well-being and ensures access to the resources and supports needed to thrive.



Heritage Place

STATEMENT OF FINANCIAL ACTIVITIES



TOTAL REVENUE: \$ 8,539,431

■ Ministry Funding	\$ 6,437,819
■ Resident Rental & Other Income	\$ 1,951,569
■ Miscellaneous Revenue	\$ 131,538
■ Amortization	\$ 18,505



TOTAL EXPENSES: \$ 8,577,964

■ Salaries & Benefits	\$ 1,707,902
■ Building & Property	\$ 345,204
■ Supplies & Other Expenses	\$ 2,830,365
■ Corporate Allocations	\$ 310,937
■ Interest on Long Term Debt	\$ 39,881
■ Property Taxes	\$ 181,872
■ Amortization Expense	\$ 413,284
■ Replacement Reserves	\$ 35,732

NET REVENUE: \$ (38,533)

The Terraces at Heritage Square

STATEMENT OF FINANCIAL ACTIVITIES



TOTAL REVENUE: \$ 2,464,098

■ Resident Rental & Other Income	\$ 1,783,820
■ Amortization	\$ 680,278



TOTAL EXPENSES: \$ 2,412,127

■ Salaries & Benefits	\$ 283,300
■ Building & Property	\$ 660,851
■ Supplies & Other Expenses	\$ 207,984
■ Corporate Allocations	\$ 197,796
■ Property Taxes	\$ 448,996
■ Amortization Expense	\$ 613,200

NET REVENUE: \$ 51,971

NUTRITION SERVICES

The Nutrition Services Department is committed to providing residents with high-quality, balanced, and nourishing meals every day. Menus are developed in partnership with the Resident Food Committee, reflecting resident preferences through the inclusion of popular dishes, seasonal fruits, and fresh vegetables. This collaborative approach ensures that dining remains a meaningful and enjoyable part of daily life.

The department places a strong emphasis on homemade meals and thoughtful plate presentation, recognizing that how food looks and tastes directly influences appetite and overall well-being. Every meal is crafted to be both nourishing and satisfying.

Nutritional care is an integral part of each resident's overall health plan. Routine clinical assessments monitor resident status, and any changes are promptly referred to the Registered Dietitian. Each resident has an individualized care plan that reflects their dietary needs, food preferences, and specific nutritional interventions — ensuring that care is as personal as it is thorough.

The department follows a liberalized diet approach, reducing unnecessary dietary restrictions to broaden food choices, promote enjoyment, and help prevent malnutrition associated with limited intake.

Resident involvement remains central to the IOOF philosophy of care. Through individualized assessments, active participation in the Food Committee, recognition of special occasions with alternative meal options, and a welcoming dining atmosphere, the department fosters meaningful social connection and genuine enjoyment at mealtimes.



QUALITY IMPROVEMENT INITIATIVES FOR 2025 AND 2026

MealSuite was fully implemented with the completion of the Paperless Kitchen System in early 2026. The Production Team can now electronically access recipes and production sheets, and record food temperatures — streamlining kitchen operations and reducing reliance on paper-based processes.

Electronic temperature probes were installed to continuously monitor the walk-in coolers and freezer in the Home's main kitchen. If temperatures fall outside the acceptable range, an automatic email alert is sent, allowing staff to respond quickly and prevent potential food inventory loss.

An immersion blender was purchased to improve the consistency of pureed homemade soups and sauces. Designed to work directly in the kettles, it eliminates the need to transfer hot liquids into a separate unit — improving product quality while reducing the risk of staff injury.

FACILITIES & ENVIRONMENTAL SERVICES

The Facilities and Environmental Services team plays a vital role in maintaining the cleanliness, safety, and functionality of the Brooks Street and Dean Avenue campuses. Through ongoing dedication and hard work, welcoming and comfortable environments are maintained for residents, staff, and visitors. The team's contributions continue to enhance the quality of life across both campuses.

INFECTION PREVENTION AND CONTROL (IPAC)

Resident health remains our highest priority, and Infection Prevention and Control (IPAC) guides every decision this team makes. Daily high-touch cleaning routines are paired with advanced technology—including ultralight fogging and Sparxs UV disinfectant machines—to reduce risk and give residents and families genuine confidence in the safety of their environment.

REDEVELOPMENT AND RENOVATIONS

Construction activity is ongoing, and the team takes every precaution to ensure it never compromises resident safety. Proactive, consistent communication with contractors confirms that all life safety systems remain fully operational throughout any redevelopment work. Any issues that surface are resolved immediately, with the comfort and security of residents and staff always coming first.

HVAC IMPROVEMENTS

Comfortable living spaces are essential to quality of life. HVAC systems across all campuses are under continuous review, with recent work including system updates, equipment replacements, and the installation of multiple heat pumps for consistent year-round temperature control. To further improve summer comfort on the Elston unit, two wall-mounted air-conditioning units have been added—a practical upgrade that makes a meaningful difference during warmer months.

ENHANCING RESIDENTIAL SPACES

Interior improvements are ongoing across all campuses. The Georgian Way and Baldwin Lane Family Rooms have received fresh flooring and new paint.



In 2025 and 2026, Heritage Place underwent a comprehensive refresh of its residential spaces, including the 2nd, 4th, and 5th floors. Wallpaper was removed, walls were repainted, and flooring was upgraded to durable vinyl plank, creating a lighter, more contemporary environment. These improvements also support enhanced infection prevention and control practices. In addition, apartment upgrades are ongoing, and the 4th floor includes a fully updated nursing station, improving both functionality and the overall atmosphere for residents and care staff.

THE TERRACES AT HERITAGE SQUARE

A major project at The Terraces at Heritage Square is now complete, with brand-new windows and patio glass installed throughout several areas of the building, enhancing both comfort and security. At 90 Dean Ave, the aging cooling tower has been replaced, ensuring residents stay comfortable in every season.

OUTDOOR SPACES

Beyond the building walls, several outdoor projects have been completed—creating safe, welcoming spaces where residents can enjoy fresh air and connect with their community.

PROGRAM SUPPORT AND VOLUNTEER SERVICES

The Program Support & Volunteer Services Department delivers a broad range of services designed to support residents' physical, emotional, intellectual, and spiritual well-being. This includes physiotherapy, restorative care, recreation and leisure, social services, spiritual and religious care, and hairdressing. Increased allied health staffing this year allowed for expanded programming and a meaningful improvement in residents' quality of life.

UPLIFTING ACTIVITIES AND COMMUNITY CONNECTION

Residents enjoyed a rich calendar of events and programs throughout the year. Large-group gatherings and special celebrations brought people together and lifted spirits — from Summer BBQs and Holiday Celebrations (including Christmas Tea, Easter Egg Hunts, St. Patrick's Day, and Halloween) to live concerts featuring the Baytown Big Band and Barrie Concert Band.

Creative and intellectual programming gave residents opportunities to discover new talents and stay engaged. Art programs, Senior Scholars Courses, Virtual Story Time, and themed events like the Mad Hatters Tea Party, Masquerade Ball, Pub Nights, and Senior Prom were highlights of the year. Unique experiences — including a Miniature Train Display, Classic Car Show, and animal visits through Zoo to You and Miniature Horses — added joy and variety to daily life.

Generous donations from the Rotary Club of Barrie continued to enhance the sensory room in the Dementia Care Unit at Kempenfelt Court, adding specialized equipment and busy boxes to support residents living with dementia. Through a partnership with North Simcoe Muskoka Specialized Geriatric Services, the department earned recognition for innovative programming, including virtual reality experiences, interactive app games, and 3D travel experiences. The Cyber Senior Program also helped residents use personal devices throughout the summer, fostering connection and independence.



PHYSIOTHERAPY: A SMOOTH TRANSITION

After 15 years of dedicated service, physiotherapists Margaret and Rafael from Excell Physiotherapy semi-retired. The department transitioned to a new partnership with LifeMark Seniors Wellness, which now provides group exercise, individualized physiotherapy, and stroke rehabilitation programs. Existing Physiotherapy Assistants were retained to ensure continuity and consistency of care for residents.

OPERATIONAL INNOVATIONS AND LEADERSHIP DEVELOPMENT

The Manager of Program Support and Volunteer Services completed two professional development milestones this year: the Advantage Ontario LTC Management Training Certificate and the University of Waterloo's Volunteer Management for the Not-for-Profit Sector Certificate. The Manager also participates in the Barrie Association of Volunteer Administrators, collaborating with peers on innovative volunteer recruitment strategies to support post-pandemic service rebuilding.

Programming continues to be guided by ActivityPro reporting data and regular feedback from Resident and Family Councils, keeping programming responsive, inclusive, and aligned with residents' evolving needs.

VOLUNTEER-LED PROGRAMS

Volunteers remain a cornerstone of the organization's success. The Tuck Shop operates three days per week thanks to their dedication, with expansion plans underway. The Last Minute Store at Heritage Place continues to run smoothly with volunteer support, and the annual Bake Sale raised over \$2,400 for the Resident Council Benevolent Fund. The Garden Committee has created welcoming, peaceful green spaces, and a thriving pet therapy program — supported through a partnership with the St. John Ambulance Therapy Dog Program — brings comfort and joy to residents through regular dog visits.

National Volunteer Week was marked with a Volunteer Appreciation Luncheon, celebrating the lasting difference volunteers make each day.



VOLUNTEER IMPACT:



162
ACTIVE VOLUNTEERS



6,480
VOLUNTEER HOURS



130
STUDENT CLINICAL
PLACEMENTS
PSW & Practical Nursing Students



16,362
HOURS WORKED

FINANCIAL HIGHLIGHTS

The Corporation ended the year with a surplus of \$610,199. A total of \$719,675, was transferred to the Home redevelopment fund, which has accumulated to \$7,373,704 to be used to redevelop the long-term care facility and to provide better care to our Residents.

CAPITAL CONSTRUCTION PROJECT

The Corporation received approval from the Ministry to build 64 new long-term care beds and renovate 66 existing beds, with construction beginning in the current year.

Ministry funding for the initial construction grant was received for \$11,030,000. The Corporation has incurred costs totaling \$8,017,978 for the project to date. The project is budgeted at \$68 million, with an estimated completed date of 2029.

MINOR PROJECTS

The Corporation completed minor projects at the Home, the Terraces and Heritage Place. The Corporation received reserve funds for both the long term care facility and for Heritage Place. These monies are being used to upgrade air conditioning and renovate apartments in Heritage Place.

PARTNERSHIPS

The Corporation continues to partner with Ontario Health and Bayshore Healthcare to provide temporary beds in Barrie and Wasaga Beach.

SUMMARY FINANCIAL STATEMENTS

Consolidated Statement of Financial Position Year ended Dec 31st

	2025 \$	2024 \$
Assets		
Cash	11,684,662	1,721,747
Accounts Receivable & Prepaid Expenses	772,799	388,695
Restricted Cash & Investments	11,689,247	11,944,680
Property & Equipment	39,474,775	37,714,537
Total Assets	63,474,775	51,769,659
Liabilities		
Accounts Payable & Accrued Liabilities	8,980,146	8,001,713
Mortgages Payable	6,226,089	7,072,617
Deferred Contributions	33,080,862	22,364,897
Replacement Reserve Funds	2,179,247	1,932,200
Net Assets	13,008,431	12,398,232
Total Liabilities & Net Assets	63,474,775	51,769,659

This information was summarized from the audited financial statements for the year ended December 31st, 2025. The complete audited financial statement is available upon request.

Consolidated Statement of Revenue & Expenses Year ended Dec 31st

	2025 \$	2024 \$
Revenue		
Ministry of Health & Long-term Care	24,587,929	23,312,870
Resident Rental & Other Income	8,282,492	7,892,551
Misc. Revenue	3,577,094	3,861,933
Total Revenue	36,447,515	35,067,354
Expenses		
Salaries & Benefits	22,005,713	19,826,249
Buildings, Property, & Supplies	11,154,436	11,624,939
Interest Costs	327,128	364,058
Property Taxes	672,152	662,930
Amortization Expense	1,642,155	1,631,153
Replacement Reserves	35,732	35,732
Total Expenses	35,837,316	34,145,061
Net Revenue less Expenses	610,199	922,293



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