



A YEAR OF INSPIRING
TRANSFORMATION

2017 Year in Review

INSPIRING CHANGE

Every year at Mather LifeWays is a time of transformation—we are not afraid of change in our organization—and 2017 was no exception, with major milestones achieved and important steps taken, and small but powerful stories of customers and residents that indicate we are on target with our mission of enhancing the lives of older adults by creating Ways to Age Well.SM

We were able to achieve these transformations and more with the dedication and support of our employees, residents, customers and board. Thank you all!



Mary Leary
CEO and President



Roger Lumpp II
Chair, Board of Directors



WELCOME	2
2017 TRANSFORMATIONS	6
ALWAYS EVOLVING	12
TRANSFORMING LIVES	18

OUR MISSION

Mather LifeWays enhances the lives of older adults by creating Ways to Age Well.SM

OUR VISION

To transform people's views of older adults

OUR CORE VALUES

- Purposeful
- Possible
- Extraordinary
- Transformational



Mather LifeWays AT A GLANCE

Mather LifeWays is a unique, non-denominational not-for-profit organization that has served older adults for more than 75 years. Dedicated to developing and implementing Ways to Age Well,SM we create programs, places, and residences for today's young-at-heart older adults through three areas of service:

Institute on Aging

Staffed by established researchers, the Institute is a respected resource for research and information about wellness, aging, trends in senior living, and aging services innovations.

Neighborhood Programs

Community-based initiatives bring myriad Ways to Age Well to older adults in their neighborhoods, from our Mather's—More Than a Café locations, to exciting events in Morton Grove and Chicago's Edgewater neighborhood, and more.

Senior Living Residences

Each Mather LifeWays residence provides a rich variety of cultural and social choices that add up to a stimulating lifestyle.

Mary Leary was included in *Evanston Woman* magazine's list of **Evanston's Brilliant Business Women of 2017**. The article, which appeared on the heels of Mary's 15th anniversary with Mather LifeWays, states, "Leary is driven to help people age in the best way possible and inspires her team members to do the same."

MATHER LIFEWAYS

By the Numbers (2017)

153,699

people served in 2017 (directly and indirectly)

EXPANDING OUR REACH ONLINE

Nearly 44,000 people receive our daily **#AgeWell** tips via Facebook, Twitter, or email.

#AgeWell tips are short, research-based tips designed to help people Age Well by promoting positive thinking about aging well and encouraging people to try new things, improve healthy behaviors, and achieve sustained improvements in health. The tips allow Mather LifeWays to extend our mission to thousands more people than we can serve through senior living, neighborhood programs, and the research and information provided by the Institute on Aging.



facebook.com/matherlifeways



twitter.com/matherlifeways

\$18.5 MILLION

contributed by Mather LifeWays to enhance the lives of older adults through a combination of initiatives in senior living, community-based programs, and Mather LifeWays Institute on Aging

\$2.6 MILLION

in financial assistance provided to residents of our senior living residences

\$705 MILLION

in total assets, with net assets of \$446 million

\$512 MILLION

in investments and trusts

\$237 MILLION

in owned or managed property and equipment*

**This figure includes Splendido.*

2017 TRANSFORMATIONS

Mather LifeWays moved ahead on important plans in 2017. Some opportunities for growth were initiated, and others came to fruition. All are designed to extend our mission of creating Ways to Age Well.SM





GROWTH IN SENIOR LIVING

Mather LifeWays has proposed plans to build a Life Plan Community in Tysons, Virginia. This exciting opportunity will enable our organization to extend our reach to a new area of the country—the Washington, DC, metro area.

Tysons is fast becoming a centrally located lifestyle hub that offers unique residential, cultural, dining, and transportation options. Not only will residents of our new community enjoy a vibrant neighborhood, they'll benefit from a lifestyle that is uniquely Mather, along with well-appointed apartment homes with smart home technology, amenity-rich community spaces, and lush green space.

Mather LifeWays plans to accept deposits in 2018, and open the community in 2022.



Readers of the *Explorer* newspaper selected **Sonora at Splendido** for first place in **Best of Northwest** in the category of Assisted Living. **Splendido** was selected for second place in the category of Active Living Community.

In 2017, with Splendido sold out and demand growing, the time was right to start plans for expansion. Soon, we'll break ground on 47 new Villa Homes, along with a transformation of the community's amenity spaces.

FACT

The **expansion of Splendido** was part of the **original plan** for the community.



Rendering subject to change without notice

INCREASING OPPORTUNITIES

with Neighborhood Initiatives

In spring 2017, Mather's—More Than a Café in Chatham and Norwood Park expanded their hours and their offerings. Mather's in Chatham began serving weekend brunch to sell-out crowds, with a rotating menu featuring mouthwatering dishes like Vegetarian New Orleans Jambalaya and Caribbean Spice Tilapia Fillet with Mango Salsa.



And Mather's in Norwood Park is now open until 8:00 p.m. Monday through Friday, serving up dinner and evening programming like Acoustic Thursdays and a monthly BYOB Paint & Sip.

FACT

Mather LifeWays shares advice with organizations interested in **adapting Café Plus**, our award-winning Café model, in **their own communities**.

Mather's—More Than a Café in Portage Park welcomed Taiwanese visitors Pei-Ling Kuo and her daughter Bella. Ms. Pei-Ling, who works in aging services in Taiwan, had heard about the Café model and wanted to see one for herself!



Newcity magazine named **Mather's—More Than a Café** the Best for Artistic Open-Minded Seniors and Anybody Else Who Wants to Come in its **Best of Chicago 2017** list.





ALWAYS EVOLVING OUR **ORGANIZATION**

In addition to the visible changes and growth across Mather LifeWays areas of service, evolution was afoot throughout our organization, as employees worked behind the scenes to support our ongoing success.

SPARKING INNOVATION

In 2017, Mather LifeWays launched **Idea Spark**, a program that solicited innovative ideas from employees with the goal of enhancing customer experiences, increasing effectiveness and efficiency, and/or adding new programs or offerings.

A committee of employees from across the organization reviewed the submissions and selected the **top innovations** based on these criteria:

- Idea supports our mission of creating Ways to Age WellSM
- Idea that's new or innovative to Mather LifeWays
- Idea that is feasible to implement
- Idea that has a positive impact on our organization, staff, and/or those we serve

The following ideas were among those selected for implementation:

- Providing an opportunity for employees to donate time off to a coworker in need
- Showcasing dishes made from recipes from customers or residents



IDEA SPARK by the numbers

 **7 RECIPIENTS** selected

 **\$500 CASH PRIZE**
for each innovative idea

 **122 IDEAS** submitted

Partnering with & Training TOMORROW'S LEADERS

Mather LifeWays is strongly committed to employee development and provides multiple avenues for advancement and learning.

In 2017, we implemented a Ways to Manage Well program. New managers and managers who are new to Mather LifeWays learned the fundamental knowledge, skills, and behaviors required for supervising others and/or managing an operational area in alignment with Mather LifeWays core values and Eliminating Impossibilities principles.

Mather LifeWays also offers monthly leadership training to staff across the organization, as well as a Ways to Lead Well leadership development program, designed to guide participants in developing their leadership brand and competencies to gain insight and experience for leading within Mather LifeWays.



Checking In on Our 2014–2018 STRATEGIC PLAN

Four years into Mather LifeWays current five-year strategic plan, we check in on **five important goals** in the plan:

GOAL	STATUS	
1 By the end of 2018, we plan to double the number of older adults we serve , both directly and indirectly.	ON TARGET	ACHIEVED
2 Our senior living residences will transform senior living . Our current (and future) communities will enable us to serve greater numbers of older adults and demonstrate the appeal of our lifestyle communities .	ON TARGET*	ACHIEVED
3 As Mather Place is transformed by our renovation and expansion, we expect that it will be award winning—a new and exciting industry model worthy of replication .	ON TARGET	ACHIEVED
4 Our community-based initiatives will continue to expand our Chicagoland presence through the evolution of existing Café locations and the growth of our “Without Walls” programs. We will also seek meaningful ways to support and engage older adults in their homes .	ON TARGET	ACHIEVED
5 Mather LifeWays Institute on Aging will further enhance Mather LifeWays as a go-to resource for the aging services field and beyond by implementing applied research and developing and delivering education programs and tools that support Mather LifeWays as an innovation incubator .	ON TARGET	ACHIEVED

*Mather Place expanded, additional Villa Homes and Sonora suites are planned for Splendido, and we have plans to accept deposits for a proposed Life Plan Community in Tysons, VA.

Transforming OUR INDUSTRY

Mather LifeWays Institute on Aging strives to share innovations and best practices with other organizations that serve older adults, with the goal of improving aging services.

- More than 90 Life Plan Communities are participating in the Institute’s **Age Well Study**, providing a total of 30,000 residents who may volunteer to take an annual survey. This five-year national study will determine whether life in these communities has health benefits for residents. The study, conducted in conjunction with Northwestern University, began in early 2018.
- The Institute published **new research** on how Life Plan Communities are responding to residents’ increased desire for transparency and engagement, sharing insights and experiences from survey respondents.
- **Promising Practices** and **Innovation in Research Awards**, annual programs implemented by the Institute, are designed to share best practices and groundbreaking research with professionals in aging services. The Promising Practices Awards recognize organizations that strive to serve older adults in original and exciting ways. The Innovation in Research Awards recognize recently published research that offers important implications for senior living or senior services.

A Range of Research on TODAY’S ISSUES

Mather LifeWays Institute on Aging regularly collaborates with universities around the country to conduct applied research. Current and recent collaborations include:

University of California, Berkeley—research on the “Village” model, including exploring reasons why older adults discontinue Village membership or choose not to join a Village

Michigan State University—research on employee engagement within senior living residences

Northwestern University—a longitudinal study to evaluate the impact of living in a Life Plan Community on residents’ cognitive, physical, and psychosocial health

NORC at University of Chicago—a study of how Cook County’s diverse older Latino population conceptualizes “positive aging” and what implications that has on promoting wellness among this population

University of California, San Diego—research on using positive psychological intervention to enhance the resilience and well-being of residents in senior living communities

Colorado State University—research on the importance of employment as a risk factor or preventive tool against age-related cognitive decline

University of Arizona—research on building positive feelings of community and belonging within senior living residences

Loyola University of Chicago—research on enhancing older adults’ perceptions of aging by savoring positive experiences

TRANSFORMING LIVES

At Mather LifeWays, we aspire to provide residents, customers, employees, and others with the resources, information, and opportunities they need to Age Well. Here are some examples of ways we touched lives in 2017...



Helping Employees Step Up to **BETTER HEALTH**

Mather LifeWays offered more opportunities for employees to improve their health and well-being in 2017:

- Employees participated in a Route 66 Map Challenge, syncing their fitness trackers or logging steps with a goal of walking 320,000 steps in eight weeks.
- Employees were encouraged to Eat the Rainbow—tracking how many colorful fruits and veggies they ate every day.
- Both challenges led up to Mather LifeWays annual Wellness Fairs, which include a free health assessment and screening.



Award-Winning **COMMUNITIES**



Mather LifeWays **art therapy program** was honored with the **Gold Award** for McKnight's **Excellence in Technology** Awards in the “High Tech High Touch” Category. Our team incorporated smart pen technology to record residents’ voices to accompany their visual art, allowing them to express themselves through storytelling and poetry.



Mather Place was honored with a **Silver Award** from the **National Association of Home Builders** in the category of **Best 55+ Renovation**.



The 2016 expansion of Mather Place achieved LEED **Silver certification** (Leadership in Energy and Environmental Design), a **green building rating system** by the **US Green Building Council**.



All 10 Mather LifeWays locations paused to view the total solar eclipse on August 21. Shown: Residents at Mather Place took in the historic sight from the garden.

Help Us

TRANSFORM LIVES

In 2017, Mather LifeWays touched the lives of more than 150,000 people. This included older adults who found new ways to connect to the people around them through our neighborhood programs and others who benefited from information from our Institute on Aging. Most of all, Mather LifeWays gave people the tools and opportunities to pursue lifelong passions. And all of this was made possible, in part, by the generous support of donors, including Mather LifeWays residents, customers, and compassionate people like you.

Mather LifeWays has created a program called Mather Possibilities to provide financial support for initiatives that would not otherwise be possible through our operating budget. Donations to Mather

Possibilities help us serve more older adults in more places. As a charitable contribution, your gift to Mather Possibilities is tax-deductible, and you will receive a gift acknowledgement for your records.

READY TO MAKE A DONATION?

Make your check payable to Mather Possibilities and mail to:

Mather Possibilities
c/o Mather LifeWays
1603 Orrington Avenue, Suite 1800
Evanston, IL 60201

Questions about Mather Possibilities and charitable contributions?

Contact us at matherpossibilities@matherlifeways.com or (847) 492.7500.

Mather LifeWays

BOARD OF DIRECTORS

Our Board of Directors provides organizational governance oversight and provides assistance in setting strategic direction of the organization.

Graham Atkinson, Former Chief Marketing and Customer Experience Officer, Walgreen Co.

Timothy Burke, Former Partner and Chief Financial Officer, William Blair & Company

Michelle L. Collins, President, Cambium LLC

Paulette Dodson, Senior Vice President, General Counsel & Secretary, PetSmart

Mary Louise Gorno, Managing Director, Ingenuity International

Philip L. Harris, Vice President and General Counsel, Northwestern University

Victoria Herget, Former Managing Director, Zurich Scudder Investments

Dian Langenhorst, Adjunct Faculty, Health Systems Management, Loyola University

Mary Leary, CEO and President, Mather LifeWays

Roger Lumpp II, Mather LifeWays Board Chair and Former Director, KPMG

Michael McGee, Former Partner, Chapman and Cutler LLP

John Phillips, Former CEO and Chairman, Corporate Solutions Group, Jones Lang LaSalle

Scott Smith, Former Publisher, Chicago Tribune and President, Tribune Publishing

Terence Toth, Former President, Northern Trust Global Investments, Current Independent Director, Nuveen Mutual Funds





To learn more about our senior living residences, community-based initiatives, and Mather LifeWays Institute on Aging, call (847) 492.7500, or find your way to matherlifeways.com.

Mather LifeWays

1603 Orrington Avenue, Suite 1800
Evanston, IL 60201
(847) 492.7500

**Mather LifeWays
Institute on Aging**

1603 Orrington Avenue, Suite 1800
Evanston, IL 60201
(888) 722.6468

The Mather

425 Davis Street
Evanston, IL 60201
(847) 492.5000

Splendido

13500 Rancho Vistoso Boulevard
Tucson, AZ 85755
(520) 878.2600

Mather Place

2801 Old Glenview Road
Wilmette, IL 60091
(847) 256.9300

**Proposed Life Plan
Community**

Tysons, VA 22102
(703) 348.8522

**Mather's —
More Than a Café**

7134 W. Higgins Avenue
Chicago, IL 60656
(773) 774.4804

3235 N. Central Avenue
Chicago, IL 60634
(773) 205.3300

33 E. 83rd Street
Chicago, IL 60619
(773) 488.2801

**Mather LifeWays
Neighborhood Programs**

1020 W. Bryn Mawr Avenue
Chicago, IL 60660
(773) 769.0299

6140 Dempster Street
Morton Grove, IL 60053
(888) 600.2560

7574 N. Lincoln Avenue
Skokie, IL 60076
(888) 600.2560

