

2021
ANNUAL
REPORT

The
Heart
of **IONA**



Care is at the Heart of Everything We Do.

It calls us to listen to the people we serve, moves us to respond to their needs in times of uncertainty, and brings out our shared humanity.

A MESSAGE FROM IONA'S BOARD PRESIDENT AND CHIEF EXECUTIVE OFFICER

IN OUR ROLES AS IONA'S CEO AND BOARD PRESIDENT, it is our great pleasure to share this 2021 Annual Report. It is a privilege to lead Iona in the face of both great challenges and tremendous opportunity.

The ongoing pandemic and escalating challenges in housing, hunger, health, and racial equity have led us, with renewed fortitude, to identify new and innovative approaches to address our community's greatest concerns. We are building on the legacy of those who came before us, most notably Sally S. White. Sally, who retired as Executive Director last fall, was influential in the expansion of Iona's programs and services over her 35-year career. Our community has benefitted from her leadership, dedication, and vision of a city where all older adults are nourished and fulfilled in mind, body, and spirit. For that, we offer our heartfelt gratitude.

The following pages reflect shining examples of how Iona is stepping up to help older adults stay in their homes and remain engaged and supported, especially in this global pandemic. Time and again, our compassionate staff have risen to the occasion. In the words of one Iona Care Manager: "I don't ever give up. I care too much." All of our staff truly embody Iona's mission of supporting our older neighbors and those who care for them.

The overwhelming care of our staff, Board, and you—our incredible supporters—is clearly having an impact.

This year, your steadfast commitment allowed us to grow our virtual programming, safely open Iona's Washington Home Center, expand our Aging Solo program to reach a national audience, develop our Food Pantry Plus into a permanent program, broaden the reach and scope of Around Town DC's offerings, and much more.



In the coming year, we will continue our listening sessions with community members to identify ongoing and emerging needs; chart our course for the future with an ambitious strategic planning process; advocate for voiceless older adults; identify opportunities to scale our programs; prioritize our work around diversity, equity, accessibility, and inclusion; and reinforce our commitment to serve all elders and caregivers of different races, ethnicities, cultures, incomes, abilities, identities, and orientations.

This ambitious work is made possible by the support we receive from all of you.

Engaging together, shoulder to shoulder, we will create the change we want to see.

Ruthann Bates
President, Board of Directors

Joon Bang
Chief Executive Officer

Being There Through the Ups and Downs

CARING FOR A LOVED ONE after an illness or injury is challenging under any circumstances. For Peter Kou, caring for his beloved wife Maybelle after she had a stroke and developed dementia—all while navigating the pandemic and living on a fixed income—led to his breaking point. Thankfully, Iona has eased the couple’s burdens in multiple ways.

Natives of Hong Kong, the Kous, both 80, had impressive careers in architecture and clinical research that took them to Great Britain and the U.S. But life changed for both of them when Maybelle suffered a stroke.

Up to that point, “we were completely independent,” Peter says. As his wife’s physical and cognitive challenges worsened, caregiving became increasingly difficult.

Peter had a home health aide and physical therapist to help take care of Maybelle, but at the height of the pandemic, he let them go out of precaution, taking on all caregiving duties himself.

Reflecting on that time, he remembers, “I don’t know how I managed.”

At his lowest point, exhausted and dehydrated, Peter ended up in the emergency room.

Like many caregivers, Peter wasn’t used to asking for help and was unfamiliar with what supports were available to the couple. When Maybelle was discharged from the hospital, someone handed Peter

a list of telephone numbers, but “they didn’t tell me what to ask or what services were available,” he says.

Referrals from a friend and another social service organization led him to Iona—and much-needed support.


“Peter was valiantly providing all of Maybelle’s care,” says Senior Nutrition Program Manager Rose Clifford. “He is so devoted to her, and, as a result, was not caring for himself.”

First, Iona arranged for home-delivered meals for the couple so Peter didn’t have to do all the cooking. Rose also provided nutritional counseling and supplements for Maybelle, who, like many people with dementia, has trouble swallowing. Since then, Maybelle has gained weight and her appetite has improved.

Rose calls regularly to check on the Kous. Peter tells her about Maybelle’s health and confides in her about how he is feeling—“both the ups and the downs.” Peter says it gives him a great sense of comfort knowing he has someone to talk to.

“Iona is helping to ensure Maybelle is comfortable and has her dignity as I say my long goodbye,” says Peter, who hopes in the future to be able to give back to the organization. “I’d like to show my appreciation to the compassionate staff and friendly volunteers by someday volunteering to help another family in their moment of need.”

Last year, **486** people received nutrition counseling and education from Iona.



“Iona is helping to ensure Maybelle is comfortable and has her dignity as I say my long goodbye.”

Peter Kou



“Iona has given me an incredible gift by supporting my uncle’s desire to live, and die, at home.”

Honoring His Final Hopes

MURRAY HOWDER has lived in his two-story, prairie-style house off Connecticut Avenue since 1966. Now 89 and living with Parkinson's disease, mild dementia, and a heart condition, he has one remaining wish: to die in his beloved home. Iona Care Manager Randy Smith and Murray's niece, Noreen Holcomb, have partnered over the last three years to make sure that his wish comes true.

Noreen, 59, hasn't had an easy time as a caregiver. Not only is she the primary caregiver for Murray—whom she calls “Uncle Moo”—she also takes care of her 86-year-old mother, who has had five strokes, and her 36-year-old daughter, who is blind and has a neuromuscular disease.

Through all this, Randy Smith has stood by Noreen's side every step of the way, providing guidance, information, and support as she cares for her uncle. He describes Murray's situation as one of the toughest he has seen in more than a decade at Iona. “Murray did everything right during his life,” Randy says. But as Murray got older, his health failed, his expenses went up, and he watched his bank account dwindle. Living out his remaining days in his home seemed like less and less of a possibility.

At the same time, Noreen often found her caregiving responsibilities draining and exhausting.

“Sometimes I don't know how I do it,” said Noreen. “God has given me a generous and supportive husband. I have fantastic friends. And I have Randy—who does things I couldn't possibly do.”

In 2021, **348** vulnerable older adults received Iona care management services from a social worker to help them navigate public benefits, connect to community resources, and more.

Randy helped Murray access Senior MedEXpress, which provides free taxi rides to medical appointments. He arranged for home-delivered meals, shopped for essentials such as toiletries and food, and coordinated visitor parking passes for Murray's round-the-clock nurses and home health aides. He also visited Murray during times when it was hard for Noreen to leave her other family members.

About a year ago, Randy addressed Murray's financial challenges and desire to age in his home by suggesting Noreen obtain a reverse mortgage to help finance her uncle's 24-hour home care, which costs about \$100,000 a year. Since then, the solution has allowed Murray to continue receiving the care he needs at home.

Meanwhile, Noreen has peace of mind knowing that she always has someone to lean on. “It would be difficult—perhaps impossible—for me to take care of Uncle Moo without the help of Iona,” she says. “Iona has given me an incredible gift by supporting my uncle's desire to live, and die, at home.”

Noreen Holcomb stands outside her Uncle Murray's house with his portrait.

Learning and Growing at Every Age



ON A THURSDAY MORNING, two dozen older adults are settling into seated mountain pose. “Become aware of any tension in the body and invite those places to relax,” says instructor Meg Artley.

Welcome to “Gentle Movement and Guided Meditation,” one of the many activities that make up Iona’s weekday program, Around Town DC at St. Alban’s. A former Iona staff member and one of many instructors for the program, Meg focuses on what older participants can do, rather than what they can’t.

The goal, she says, is “coming together, building community, and being joyful.”

After being closed for more than a year due to the pandemic, Around Town DC at St. Alban’s returned in September 2021 to the delight of both longtime and new participants. “There’s a real sense of gratitude,” says Site Manager Frances Bucien. Participants 60 years and older come for a variety of reasons: exercise, coffee and conversation, a daily meal, fresh produce from the monthly farmer’s market, to see old friends and make new ones. Mostly, they come to be part of a supportive community — all too important during a pandemic and a time of life when many older adults feel isolated and alone.

This is confirmed by longtime participant Joy Allen, 68. She gestures to Harold Cupid, 82, who is sitting next to her at lunch. “I’ve known this gentleman since day one. When things shut down, I really missed my friends. I like being around people who are at my stage of life.” Harold loves the program so much that he takes three buses to reach St. Alban’s from his home in Ward 5.

Meg Artley leads an Around Town DC class at St. Alban’s.

485 older adults enjoyed **18,168** hours of learning, community, and friendship through virtual and in-person Around Town DC activities in 2021.

“People are elated to have some structure back in their lives,” points out Liza Chapkovsky, an Iona Care Manager who is on site once a week to help participants access benefits such as Medicaid, SNAP, Metro Access, and a special program set up by the District for people at risk of eviction.

Frances Bucien, the site manager, has seen attendance at St. Alban’s growing steadily since it reopened, with an average of 50 participants each week. She is not surprised by participants’ enthusiasm for trying new activities like meditation and Indian dance. “People learn and grow at every age,” she observes.

As the meditation session winds down, Meg Artley invites the group to chant together. “Namaste, dear friends,” she says.

“Namaste,” they respond together, as a community.

(RIGHT) ■ 1. Participants sampling fresh produce at Iona’s monthly farmers market. ■ 2. Catching up over coffee. ■ 3. Enjoying an exercise class.



“When things shut down, I really missed my friends. I like being around people who are at my stage of life.”



“They went from being scared to touch a tablet to coming into a second chapter of their life.”

Fighting Social Isolation with Technology

EARLY IN THE PANDEMIC, Iona participants were stuck at home, isolated from activities and friends. “Many older adults’ cognitive skills began to decline, while family caregivers were desperate for relief,” says Sarah Grogan, Director of the Wellness & Arts Center.

But in a matter of weeks, Iona staff members taught themselves how to bring programs online through Zoom, spending countless hours with participants and families.

Through the DC Department of Aging and Community Living’s Senior iPad Project, Iona also helped coordinate free iPad tablets and Internet access cards for dozens of older adults. “This program was an incredible opportunity to close the digital divide among seniors in DC and keep them connected to Iona’s programs,” says Joon Bang, Iona’s Chief Executive Officer.

“The technology we have helped provide to older adults plays a huge part in their quality of life,” says Keith Jones, Program Specialist at Iona’s Washington Home Center.

“A lot of them haven’t seen family members during the pandemic. Now they are learning to get on Zoom and can get in touch with family and people they haven’t seen in 20 years.”

For participants who live alone or have cognitive challenges, having access to new technology has been particularly life changing. “We send them recipes and

101 older adults attended Iona’s two adult day health centers in 2021.

brain games and it does wonders,” observes Keith. “They went from being scared to touch a tablet to coming into a second chapter of their life.”

One participant with dementia, Ms. Turner, doesn’t attend the Washington Home Center in person but participates virtually. “She lives around the corner from me, so I sat at a distance on the porch with her as I showed her how to use her iPad,” says Keith. “She likes to listen to her music and play bingo. We play Name that Tune.” Now, a year later, Ms. Turner can turn on her tablet faster than Keith can, motivated by a desire to listen to her favorite music — The Temptations.

Keith takes pride in working with every participant to make sure they are able to navigate their iPad and master new skills. “It’s good for our seniors to be engaged with technology. They don’t get the full picture of the world watching the news at night,” he says. “Now, our participants can search the web. They can look up a new medication and read about the pros and cons of taking it.”

“It’s the future we’re in now,” he adds.

John Lee, Jr., a participant at Iona’s Washington Home Center, uses his tablet.

Aging Solo Goes National

IN 2021, OLDER ADULTS around the country learned what Washingtonians have known for years: Iona has the best resources and tools for helping individuals take charge of their aging.

Last year, Iona introduced Aging Solo, a self-guided digital course that provides resources, strategies, and videos to people who are aging on their own. The course addresses topics like building a support network, healthcare decision making, end-of-life choices, aging in place, and making a move.

Aging Solo was developed because people kept coming to Iona in crisis — often because they had not planned ahead for the challenges that older adults face later in life.

This led Iona's Senior Director of Programs, Deb Rubenstein, to wonder: "What if we take what we know, reach people earlier, and give them autonomy in the aging process?" And so Aging Solo was born.

At first, Aging Solo was offered in person at Iona's Tenleytown office. Moving the series online presented Iona with an opportunity to scale the program for a larger, national audience. "We always knew this curriculum didn't exist anywhere else and wanted to make it more widely available," says Rubenstein, who oversees the program.

Maria Thompson, an Aging Solo graduate, with her course handbook.



“Aging solo is a very big gift to members of our community.”

Houston-based Amazing Place, a day program serving individuals with dementia, was one of the first organizations outside Washington, DC to adopt Aging Solo. Social worker Katherine Christie learned to teach the course using Iona’s facilitation guide and videos.

“Aging Solo complements our work and has expanded our audience,” says Christie. Participants in the initial Amazing Place group ranged from a woman who arrived with a notebook filled with detailed information to another in her late 70s who said she was “in denial” and hadn’t done any planning around getting older. “I told her that taking the class is the first step for lots of people,” says Christie.

Another aging services nonprofit, New York City-based DOROT, calls its version of the program “Aging Alone, Together.”

DOROT’s Claire Nisen calls the Aging Solo curriculum “a very big gift to members of our community,” adding that DOROT had to cap the first online session at 80 people, with a waiting list of 60. “There are many more ‘Aging Alone, Together’ programs in our future,” she says.

“Whether by choice or circumstance, many older adults find themselves without the traditional support system provided by family,” notes Rubenstein.

“Aging Solo is an excellent way to begin having important conversations with yourself and others about how you want to spend your older years and start building up your support system in order to make that happen.”

Ready to take charge of your aging?

Try Aging Solo, our award-winning course for individuals and organizations! Purchases are offered on a sliding scale and include a digital handbook and series of videos.

Learn more by visiting www.iona.org/agingsolo or emailing community@iona.org.



Thank you, Iona volunteers!

In 2021, 179 volunteers gave 5,134 hours of their time, energy, and commitment to Iona. Thank you for being a part of our community—you are essential to our work. If you'd like to join us, contact our Volunteer Manager at volunteer@iona.org.



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You are a lifeline for older adults and caregivers.

With help from 1,506 donors in fiscal year 2021 (October 1, 2020–September 30, 2021), we were able to continue providing lifesaving services to older adults and families, including reopening in-person programs, increasing supports for caregivers, offering Aging Solo online, and much more.

Your financial support ensures that Iona can continue to help our community members as they navigate their unique journeys of aging. Make a contribution by using the enclosed envelope, calling **(202) 895-3418**, or visiting www.iona.org/donate.

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UnitedHealthcare Community & State
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Washington Hebrew Congregation
The Washington Home
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Family Foundation

Iona's Helpline: A Resource for All

Each year, Iona's Helpline is a trusted resource for thousands of older adults, caregivers, and concerned community members. In 2021, the Helpline received 4,248 calls about topics including social programs, home health care, caregiver support groups, and critical services for vulnerable older adults.

Samantha Henson, Senior Manager of Information, Referral, and Resources, speaks with a Helpline caller.

TRIBUTE GIFTS

AARP
William Amt
Nanci E. Banks
Ruth Barnes
Sarah Barnett
Blessed Sacrament Church
Wendy F. Block
Deborah M. Blum
Dixcy Bosley-Smith
Judy and Tom Bowles
Child Care Counts
John Collinge and Zandra Flemister
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Ted and MaryGael Timberlake
Elinor Waters
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MEMORIAL GIFTS

Marc Atz
Eunice "Sally" Badoux
Alfred and Edith Balfour
Nora Lee Banks
Maria Bauer
Evelyn Baylor
Edgard F. Bertaut
Marlena Besen
Eleanor S. Blue
Ralph F. Braun
Dorothy Bull
Myrtice H. Canady
Mary Jane Carney
William Christenberry
Bert H. Cooper
Claudine and Roy Craey
Darwin O. Curtis
Randy Curtis
Cleopatra Dibble
Margery Elfin
Mel Elfin
Earle Elliott
Phyllis M. Frick
Martha Gethers



Produce Market at St. Alban's

Iona hosts a monthly produce market at Around Town DC at St. Alban's. Several types of fresh fruits and vegetables are offered, along with nutritional information, recipes, samples, and food demonstrations. Iona nutritionists and dieticians are also on site to answer questions. The market fights senior food insecurity by allowing older adults to grocery shop outside their household budget and try new produce or dishes.

MEMORIAL GIFTS continued

Mary Louise M. Gilman
Albert Gordon
Rebecca Pride Jackson
Bobbie Jones
Abigail Kilpatrick
Natasha Kirjanova
Lillian Kronstadt
Terry Lenzner
Rachel Baumgartner Lozano
Charles Maatta
Yvette Marette
Norene D. Martin
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Ruth C. Merryman
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Clement Munno
Bess and Roger Nelson
Mary Oates
Noel and Robert Plummer
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Eileen Ross
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Julianne C. Simpson
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Preventing financial exploitation

Iona's Money Management Program (MMP) helps older adults navigate their financial responsibilities while educating clients about scams. Jacob used to give out his personal information to scammers on the phone and then wait for a payout. Instead, he began calling his MMP social worker weekly to discuss specific calls. Today, Jacob feels more comfortable identifying scammers and hanging up right away.

Financials

FY October 1, 2020 – September 30, 2021
(audited)

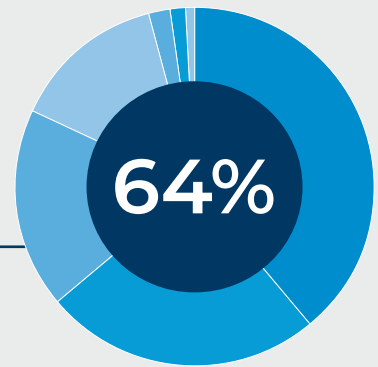
REVENUES

Government and Foundation Grants	\$3,047,423
Donations	\$1,935,216
Released from Restricted Participant Income and Insurance Reimbursements	\$1,116,871
Other Income	\$144,470
Investment Income	\$112,637
Donated Services and Facilities	\$59,758
Total Revenue	\$7,852,644

EXPENSES

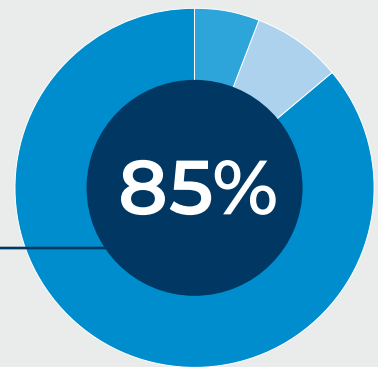
Administration	\$498,031
Fundraising	\$577,952
Program Services	6,129,026
Total Expenses	\$7,205,009

FY21 REVENUES



64% of revenue came from individual donations (25%) and grants (39%).

FY21 EXPENSES



85% of FY21 expenses went to directly support program services.

8% was for fundraising and 7% was for administrative expenses.

Your philanthropic support makes life better for older adults and family caregivers in Washington, DC. Thank you for making this year possible. For our full financial report, please visit www.iona.org/about/financials.



Iona's sound fiscal management practices and commitment to accountability and transparency earned us six consecutive 4-star ratings from Charity Navigator, America's largest independent charity evaluator.



Supported by the D.C. Department of Aging and Community Living

PROUD MEMBER OF



#8833



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Together, we
gave hope to
**4,719 older
adults and
caregivers**
in 2021.

THANK YOU!

IONA
Age Well Live Well

(202) 895-9448 | info@iona.org | www.iona.org

Writing: Janice L. Kaplan | Design: Odd Egg Design | Photography: Hector Emmanuel