

# 2022 Annual Report



**IONA**

*Age Well. Live Well.*

# Building community through connections.

On the cover: Wellness & Arts Center participants Oladeinde A., Habiba B., Henry G., and Viola B. enjoy a laugh with each other.

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

As we emerged from the shadow of several challenging years, 2022 offered us a moment to refocus on our original purpose, connecting older adults in Washington, D.C. with the care, resources, and social outlets they need to thrive. As a result, throughout this year's Annual Report you will find stories of connection.

These stories reflect on the connections between older adults and their peers; callers to our Helpline and the answers and resources they are seeking; family care-partners and the support they need to receive respite; and of course, connections between our dedicated staff and the communities we serve.

### **We are proud of each one of the connections we helped make this year.**

Some highlights from our year include the launch of our innovative In-Home Peer Support program which serves two equally important purposes: providing supplemental income for older adults hired as support workers and connecting them with Iona clients who live independently and often experience isolation, a situation that was heightened during the pandemic.

This year we saw attendance double at our Adult Day Health Program at the Iona Washington Home Center in Southeast D.C. Older adults emerged from the isolation caused by the pandemic and joined their peers for daily connection, enriching activities, and compassionate care, while family caregivers connected with the supportive services we provide to help them access respite care and support groups while caring for their aging loved ones.

And in the most literal definition of connection, the Iona Washington Home Center was declared a Comcast Lift Zone, with Comcast donating three years of free high-speed Wi-Fi, laptops, and \$10,000 to help Iona address the lack of digital access for older adults in Southeast D.C.



Another point of pride for us this year was the continued growth and development of Iona's Diversity, Equity, Inclusion, and Belonging (DEIB) Committee. Founded in 2021 and made up of staff and board members who volunteer their time, the committee has a dual focus on education and celebrating diversity within the Iona community.

As we move into the new year, we honor those who came before us and laid the incredible groundwork that we hope to build upon in 2023 and beyond. We are particularly grateful for the leadership of our outgoing Board President Ruthann Bates, whose compassion and dedication to Iona made her a guiding light during the dark days of the pandemic.

In 2023, we will take a step back from the daily hustle to cultivate a bold strategic plan to advance Iona's important mission. As we continue to connect our diverse, older adult communities with opportunities, we will build innovative solutions with our most vulnerable and underserved in mind.

**All of the growth we experienced in 2022 and the big plans we have for the year ahead are possible because of your support. Thank you for standing with Iona, and our clients, through the challenges and the successes.**

**Jeneen Ramos**  
*President, Board of Directors*

**Joon Bang**  
*Chief Executive Officer*

# Connecting to Financial Resources

The first signs of cognitive decline often show up when an older adult has difficulty managing his or her finances. Iona's Money Management Program launched in 2015 to address the complexities of supporting older adults in navigating financial responsibilities and protecting their funds from scams and exploitation.

Through the Money Management Program, which is partially funded by the Department of Aging and Community Living (DAACL), social workers make regular home visits, and with permission, review mail, help clients organize finances and provide payment reminders, accompany clients to the bank or ATM, review bank statements and financials for fraud, and more.

One common need is the recertification process for either the Medicaid Elderly and Persons with Disabilities (EPD) Waiver or subsidized housing. For example, Iona social worker Heather Coryell recently guided her client, Marjorie, through the process of compiling and submitting all the necessary information to maintain her subsidized apartment in a senior building in Ward 6.

Marjorie was also experiencing an ongoing challenge adhering to the Medicaid EPD Waiver's asset limit.


By living frugally, Marjorie's accumulated savings were exceeding the limit required to remain eligible for the waiver that provides her in-home care and other supports and services.

Heather engaged Marjorie and Marjorie's trusted friend who holds her power of attorney. Together they were able to spend some of Marjorie's funds on other needs to bring her savings below the threshold before the deadline so that she would remain eligible to stay in her apartment.

Of her experience working with Iona, Marjorie says, **"They are the most helpful people I have ever worked with. They are interested in what you are doing, they are knowledgeable, and you can trust them."**

Now that Marjorie's recertification process is secure for another year, Heather stops by every couple of weeks so they can go through mail, review any bills or upcoming deadlines, and just spend time together chatting and being social.

**"I never expected to get this kind of help from anybody,"** Marjorie says, when expressing her gratitude for the care and connection that Heather and Iona have provided.



"They are interested in what you are doing, they are knowledgeable, and you can trust them."

Marjorie in her apartment.



“There was an immediate connection. We set up everything and basically it changed our whole life.”

# Connecting Caregivers

When Marie’s uncle passed away from COVID-19, her 81-year-old mother, Classie, who had been living with her brother, was now left alone in New York State, while dealing with Alzheimer’s disease. The situation was unsustainable, and Marie made the difficult decision to move her mother to Washington, D.C. and into her home.

“I was working from home for over a year with my mother just there, wandering around. I removed her from her comfort zone, so she had some major setbacks. **But I was also experiencing a lot of frustration because it was just too much to have to work and caregive at the same time without any outlets because of COVID.**”

Marie called local organizations for help and got connected with Iona, where she learned about our adult day health services at the Washington Home Center in the Congress Heights neighborhood in Southeast D.C. After visiting the program with her mother, she says, **“I was very impressed with Iona and the level of care and the energy of their facility and the people there. The programming is one thing on paper, but [in-person] the energy and the care that these individuals provided was very impressive.”**

Classie also enjoyed her visit. Marie explains, “There was an immediate connection. We set up everything and basically it changed our whole life.” Classie now attends the adult day health services program Monday through Friday every week, connecting with her peers and engaging in enriching activities in a safe environment with compassionate professional care.

Classie with her daughter, Marie.

But Iona offers more than just services and support for older adults. We also provide support to family caregivers to help prevent the burnout that so often comes with caring for a loved one.

In 2022, Phyllis Barge, the social worker at the Iona Washington Home Center, launched a Caregiver Support Group to address the ongoing needs of caregivers, like Marie, who found the day-in and day-out caring for someone with memory loss to be challenging and isolating.

Between work and caregiving, Marie rarely had a moment to herself. Phyllis connected her with respite care and encouraged her to attend the Washington Home Center Caregiver Support Group, which meets every second Tuesday of the month. The group does various activities together, including sharing conversation and fellowship.

**“When they come in, it’s on their faces that they are tired and weary. They have a lot going on because they have their own lives and issues they are dealing with,”** Phyllis shares. But at the end of the support group meetings, it’s a different story. “Sometimes the group doesn’t end for an hour after I stop the conversation because they are still talking and engaging with each other.”

Marie says she looks forward to every support group meeting. **“I learn something valuable at each meeting, and I never miss them.”**

Reflecting on her whole experience with us, she adds, “I can’t say enough about what Iona has done and what they are doing for our population.”

# Connecting Companions

On any given Friday you might run into Peer Support Worker Kevin and Iona program participant Mary browsing the aisles at the grocery store, cracking jokes with each other on the city bus, or carrying Mary's purchases up the stairs to her apartment.

The two met through one of Iona's newer offerings, the In-Home Peer Support Program. This innovative pilot program, funded through a grant from the Department of Aging and Community Living (DACL), pairs support workers who are D.C. residents 50+ years of age with program participants, D.C. residents over 60 years of age. Peer support workers provide companionship, and help with small everyday tasks like grocery shopping and organizational or technological assistance.

Mary says, "Kevin and I get along very well together, we talk about current events and a variety of topics."

Kevin agrees, "We talk about the kinds of things we are not supposed to talk about, like politics, etc. I really hit it off with her. We are like two peas in a pod. She's got a great sense of humor, and I really appreciate that."

The In-Home Peer Support Program was designed to provide assistance and companionship to socially isolated older adults across the city, while also providing part-time employment opportunities for older adults who'd like to help their neighbors.

Support workers like Kevin receive training and meet weekly with Program Manager Gabrielle Boccher and Resource Specialist Liza Chapkovsky.

Initially, Mary reached out to Gabrielle to ask for assistance getting her groceries up the stairs to her second-floor apartment. Her building doesn't have an elevator, and Mary had injured her arm and her back in the past trying to get her purchases into her home.

**"I like to pick out my own food, I don't want anybody bringing it to me. I would like to go to the store and get my own food for as long as I can,"** Mary says.

Kevin says his role as a support worker with the In-Home Peer Support Program "...gives me an opportunity to give back to my community. Each of the seniors that I serve are different, and they draw on the skills I have, and I am pleased to be able to help. **It's much more satisfying than a salaried professional position.**"

As for his role with Mary, he says, "If I can help her stay in her home for longer simply by lifting a large amount of groceries up two stories, then I am pleased as punch to do that."

And when asked about Kevin, Mary has nothing but effusive praise. "He's a godsend to me. He's very helpful," she adds, **"I don't know what I would have done without this program."**

Iona program participant Mary, with peer support worker Kevin.



**"If I can help her stay in her home for longer simply by lifting a large amount of groceries up two stories then I am pleased as punch to do that."**



“With Iona’s help, my mother can eat and enjoy the foods she needs to be healthy and manage her diabetes.”

# Connecting to Nutrition

Elnora is in her late nineties and is blind and hard of hearing. Despite these challenges, she lives in her own senior public housing apartment in D.C., rather than in a skilled nursing facility. Her chosen independence is made possible in part because of the in-home care she receives through D.C.’s Elderly and Persons with Disabilities (EPD) Medicaid Waiver program, along with the devotion of her daughter Mardecia, who closely manages her mother’s well-being. Mardecia is known fondly for leaving notes all over her mother’s home specifying the high level of care she expects the professional caregivers to provide for Elnora.

Another reason Elnora is able to stay in her home is because Mardecia has reached out to Iona throughout the years to access support for her mother. Elnora is a former participant of Iona’s Wellness & Arts Adult Day Health program. She also benefits from several food and nutrition security programs, including home-delivered meals through D.C.’s Administration on Aging and Community Living (DAACL), a monthly SHARE Food Network grocery box delivery, weekend produce deliveries, liquid nutritional supplement drinks, and nutrition counseling and management by Iona licensed nutritionists.

Mardecia says participating in Iona’s food and nutrition programs has had a “tremendous impact on my mother’s financial wellbeing, alleviating my stress by knowing deliveries of shelf-stable food, cleaning products, and hygiene supplies from Iona’s Food Pantry Plus program are always there for us. My mother does eat, she normally has a lot of fresh

vegetables. But her income alone can’t provide for all her needs. With Iona’s help, my mother can **eat and enjoy the foods she needs to be healthy and manage her diabetes.**”

Rose Clifford, a licensed registered dietitian nutritionist (RDN) and Iona’s senior nutrition advisor, knows it is not just about providing any food to clients like Elnora, but about making sure seniors have access to food that appeals to them and meets their specific medical and nutritional needs.

**“The number one thing people want is access to produce and other fresh food. They want to eat healthy food that tastes good,”** explains Rose. “A lot of the time the choices that are available from (food) programs are boxed, shelf-stable items that are highly processed with high levels of sodium or added sugars. It hurts to know that seniors have to sometimes accept food that is not in their best interest because they need calories in their cabinets and food in their stomachs.”

Iona is working hard to reduce senior hunger in D.C. by ensuring our clients have access to nutritious meals that include quality protein, whole grains, healthy fats, and fresh vegetables and fruits.

Ultimately, Iona’s goal is to help clients access whatever they need to thrive. Rose works closely with Elnora and Mardecia to make sure they have what they need to keep Elnora healthy and happy at home.

Elnora with her daughter, Mardecia.

# Connecting Callers

If you've picked up the phone in the last year and accessed resources or information through Iona's Helpline, chances are good that you spoke with Senior Manager of Information, Referral and Resources Samantha Henson, a social worker who joined Iona in January 2022.

Samantha works with the Information and Referral team to manage the wide variety of requests that come in by phone and email. She and her team respond to an average of 16 inquiries per day, although she says, "Some days are busier. We respond within one business day for messages, but we are usually able to respond much faster than that."

The Helpline is often the first contact people have with Iona when they reach out to get more information and find out what help is available. No concern is too large or too small.

"Typically, someone would call the Helpline first. We try to understand what's going on with the caller and what they need, and what they are looking for," says Samantha. Referrals might then be made to an Iona program or to an outside resource, depending on what would best meet the caller's needs.

There is no typical call, although some requests are more frequent than others. "We get a lot of questions about transportation. Or from people who need a little bit of help at home, either respite care for a caregiver, or maybe they have had a medical change and they need more support with things like cooking and cleaning and daily living activities. We get a lot of calls about our adult day programs, care management, and support groups."

Samantha details how she recently worked with someone whose spouse was experiencing memory loss. They were looking for assistance and initially inquired about in-home care options.

She provided some information about possible financial subsidies to help pay for in-home care, but Samantha also offered up information about Iona's adult day health services, with which the caller was unfamiliar.

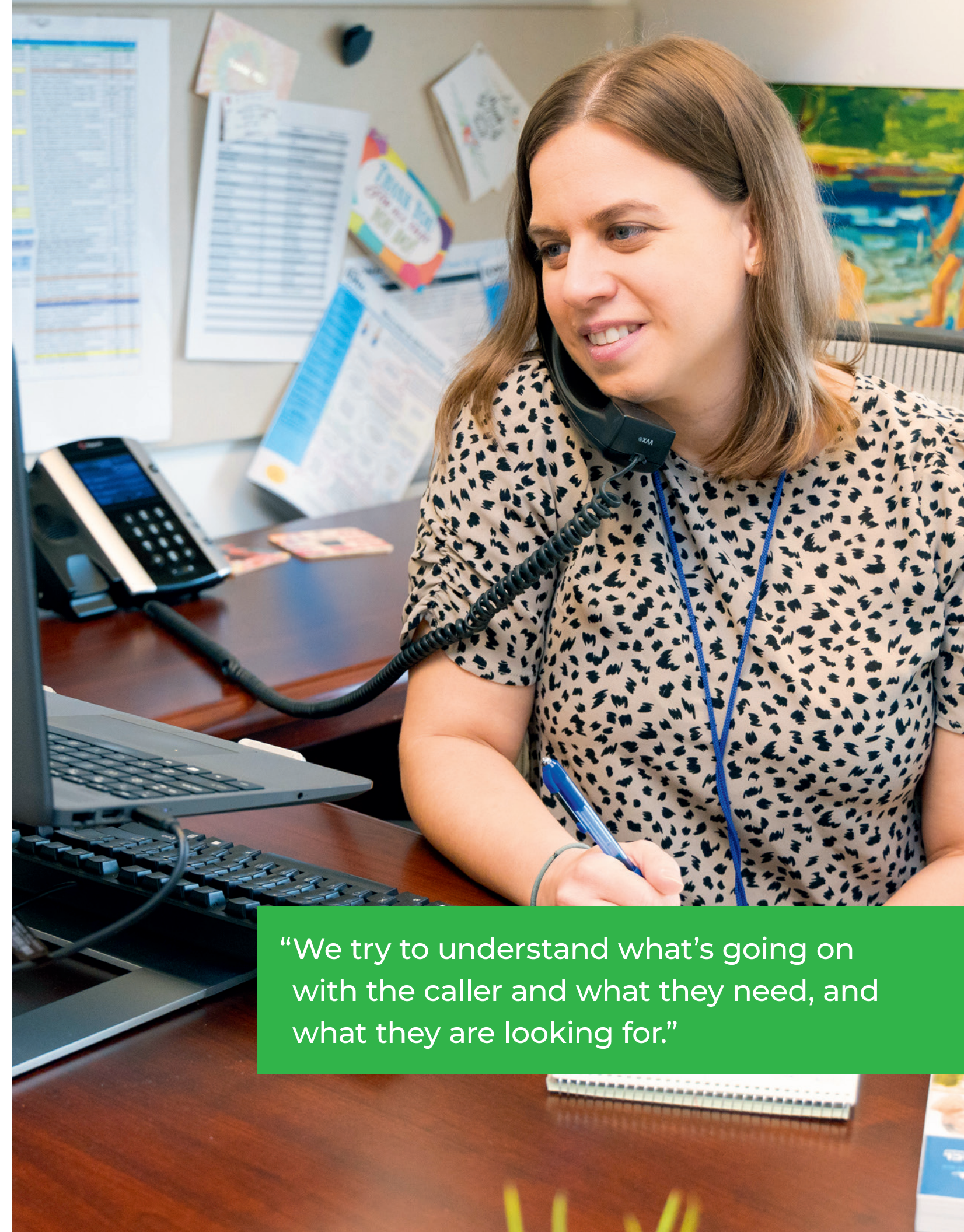
The caller was interested in the program, but worried that their spouse would not be willing or excited to attend. Samantha was able to send the caller suggestions on how to discuss the program with their spouse and connect the caregiver to the adult day health program staff to arrange a tour — a chance for the spouse to come see the program in action and decide if it was a good fit.

Samantha says, "The caregiver responded really positively to this option, saying they thought it would be a great fit and for the first time in a while felt like they weren't supporting their spouse alone and now have some support."

The caregiver came in seeking a solution and Samantha was able to connect them to multiple options and avenues to move forward.

Whatever your question or concern, Samantha says, **"I just want to encourage people to call."** She and her team are waiting eagerly to help you connect with the answer, program, or resource you need.

Samantha Henson at her desk.



"We try to understand what's going on with the caller and what they need, and what they are looking for."



# Thank you, Iona volunteers!

In 2022, 399 volunteers gave 5,154 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 Program Manager at [volunteer@iona.org](mailto:volunteer@iona.org).

## 2022 Board of Directors

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Heather Foote  
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Kris Laurenti  
Tina Lindberg  
Wes Morrison  
Sal Selvaggio  
Pleasance Silicki  
Mary Worstell

# You are a lifeline for older adults and caregivers.

With help from 1,254 donors in fiscal year 2022 (October 1, 2021–September 30, 2022), we were able to continue providing critical support services to older adults and families.

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) 895-9418**, or visiting [www.iona.org/donate](http://www.iona.org/donate).

### FOUNDATIONS, CORPORATIONS, AND COMMUNITY ORGANIZATIONS

Anonymous (2)  
Agua Fund, Inc.  
Aid Association for the Blind  
Jack R. Anderson Foundation  
Apex Optical  
The Morris and Gwendolyn Cafritz Foundation  
CareFirst BlueCross BlueShield  
Eugene B. Casey Foundation  
Catalogue For Philanthropy: Greater Washington  
Clark Construction Group, LLC  
Comcast  
DC Commission on the Arts and Humanities  
The Max and Victoria Dreyfus Foundation, Inc.  
Elno Family Foundation  
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Evergreen II Trust  
John Edward Fowler Memorial Foundation  
Giant Food, LLC  
Greater Washington Community Foundation  
GRF CPA's & Advisors  
Corina Higginson Trust  
Junior League of Washington  
The Kahlert Foundation  
S. Kann Sons Company Foundation, Inc.  
Eugene M. Lang Foundation  
Living on the Go Foundation  
Ada Harris Maley Memorial Fund  
Mars Foundation  
Marshfield Associates  
Meals on Wheels - Ward Circle Georgetown  
Meals on Wheels America  
Posner-Wallace Foundation  
Roadside Development  
Harold Rubenstein Family Foundation  
Polly Shackleton Fund for Iona Senior Services  
Share Fund  
Edward N. and Della L. Thome Memorial Foundation  
Alice and Russell True Foundation  
United Bank  
United Way of the National Capital Area  
Venable Foundation, Inc.  
Washington Hebrew Congregation  
The Washington Home - A Charitable Foundation  
The Wawa Foundation  
George Wasserman Family Foundation

### COMMUNITY PARTNERS

AARP-DC  
American University  
Anacostia Riverkeeper  
Annunciation Catholic Church  
Around Town DC Volunteers  
Cub Scout Pack 100  
DC Regional Christian Church  
DC Appleseed Center  
DC Public Library  
East River Collaborative  
Feed the Family Pantry  
Friends of Anacostia Park (FOAP)  
Georgetown University Medical School  
Girl Scout Troops 5828 and 34015  
GRF CPAs & Advisors  
Jack & Jill of America, Nation's Capital Chapter  
Janney Elementary School  
Junior League of Washington  
The Links, Incorporated Potomac (VA) Chapter  
Mayor's Summer Youth Employment Program  
Meals on Wheels America  
Panera Bread – Tenleytown  
Pennsylvania Avenue Baptist Church  
The Phillips Collection  
Potomac School  
Residents of 4000 Tunlaw Road, NW



## 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 2022, the Helpline received 2,385 calls about topics including social programs, home health care, caregiver support groups, and critical services for vulnerable older adults.

Iona social worker Wendy Blum speaks with a Helpline caller.



### COMMUNITY PARTNERS continued

Residents of Embassy Park Drive, NW  
 She Loves Me Florist  
 Shrine of the Most Blessed Sacrament  
 St. Alban's Episcopal Church  
 St. Ann's Catholic Church  
 St. Bartholomew's Catholic School  
 St. David's Episcopal Church  
 St. Thomas Apostle Catholic Church  
 Stoddert Elementary School  
 THEARC  
 The Well – DC Greens  
 Thomas L. Johnson Lodge #28 and Thrift Chapter  
 No. 12/Order of the Eastern Star  
 Viva Vita  
 Volunteer Fairfax  
 Washington Hebrew Congregation  
 Wegmans  
 Wellesley College, Hive Internship Project  
 Wheeler Creek Senior Center  
 Whitman-Walker Health

### TRIBUTE GIFTS

Bill Amt  
 Rob Bamberger  
 Joon Bang  
 Ruthann Bates  
 Wendy Feldman Block  
 Elizabeth S. Fox  
 Tara Frank  
 Lena Frumin  
 Miranda Goodyear  
 Trevor Goodyear  
 Dominique Hughes  
 Iona Staff  
 Sam Kilpatrick  
 Michele McNally  
 Susan Messina  
 Malika Moore  
 Jan Preston  
 Fred Reiner  
 Lisa Rindner  
 Rita Ross  
 Deb Rubenstein  
 Ann Schwartz  
 Jennie Smith-Peers  
 Melissa Zimmerman Susser  
 Emma Swain  
 Lynn Tag  
 Courtney Talbert  
 Edmond Tapscott  
 Sally S. White  
 Caren Wilcox  
 Dottie Woodcock

### MEMORIAL GIFTS

Elly Andonyadis  
 Albert Bilik  
 Harvey Block  
 Oscar Boitel  
 Lynn Chalmers  
 John S. Cianflone  
 Lorraine D'Antonio  
 Cleopatra Dibble  
 Mel Elfin  
 Deborah Estes  
 Wally Etienne  
 Mary Blanche Freeman



## Produce Market at St. Alban's

Iona hosts a free 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 dietitians are also on site to answer questions. The market fights senior food insecurity by allowing older adults to choose produce outside their household budget and try new items or dishes.

**MEMORIAL GIFTS continued**

- Albert Gordon
- Lena Green
- Sheldon Grossman
- Velma James
- Beverly Johnson
- Abby Kilpatrick
- Isadore Kozatch
- Anna C. Lee
- Y.S. Lee
- Nancy Lewinsohn
- Humbert Marc Lopes
- Andrew Marsh
- Norene Martin
- Charlye Malloy
- William Manca
- Alfred E. Moreau
- Ruth G. Nadal
- Lee Nolting
- John O'Connor
- Susan Ottinger
- Maude "Rita" Rhymes
- Ruth Robinson
- Sharon Schaeffer
- Dieter Schellinger
- Helen Simpson
- Julie Simpson
- John Unkle
- Mike Waxman
- Elizabeth "Betty" White
- Karen Hastie Williams
- Ann Winsor
- Qiankai Yan
- Phyllis Yingling



**Preventing financial exploitation**

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

**Financials**

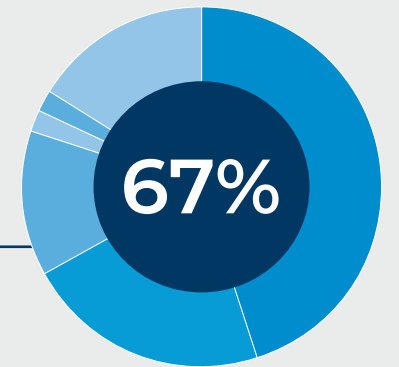
FY October 1, 2021 – September 30, 2022 (audited)

<b>REVENUES</b>	
Government Grants	\$ 3,834,927
Individual Gifts and Foundation Support	\$ 1,920,592
Participant Income and Insurance Reimbursements	\$ 1,118,421
Other Income	\$ 170,268
Interest and Dividends	\$ 131,315
<b>Total Revenue Received</b>	<b>\$ 7,175,523</b>
Board designated use of net assets from prior year's operational surplus	\$ 1,399,304
<b>Total Revenue and Cash Reserves</b>	<b>\$ 8,574,827</b>

<b>EXPENSES</b>	
Administration	\$ 1,264,556
Fundraising	\$ 698,597
Program Services	\$ 6,611,674
<b>Total Expenses</b>	<b>\$ 8,574,827</b>

Your philanthropic support makes life better for older adults and family caregivers in Washington, D.C. Thank you for making this year possible. For our full financial report, please visit [www.iona.org/about/financials](http://www.iona.org/about/financials).

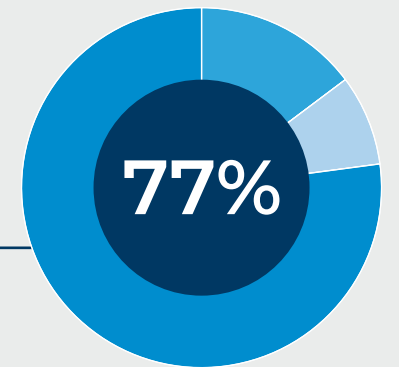
**FY22 REVENUES**



67% of revenue came from contributions of government grants, individual gifts, and foundation support.

13% was from reimbursements, 16% from Board designations, and 4% from other, plus interest/dividends.

**FY22 EXPENSES**



77% of FY22 expenses went to directly support program services.

8% was for fundraising and 15% was for administrative expenses.



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.



Together, we helped and gave hope to  
**3,773 older adults and caregivers in 2022.**

**Thank you!**



**IONA**  
Age Well Live Well

(202) 895-9448 | [info@iona.org](mailto:info@iona.org) | [www.iona.org](http://www.iona.org)