

Annual Report

December 2020

University of Louisville Trager Institute
Republic Bank Foundation Optimal Aging Clinic

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 **TRAGER
INSTITUTE**

Republic Bank Foundation
Optimal Aging  **Clinic**

LETTER FROM THE LEADERSHIP TEAM

Dear Friends,

In spite of an unprecedented major pandemic and a shift from in-person care to telehealth, and a workforce that transitioned between the office and telework, 2020 was a transformative year. We experienced significant achievements and innovative solutions in providing healthcare, increasing research, accelerating workforce development and expanding community outreach. Our strong purpose and strategic principles guided us as we improved and expanded patient care, increased grant funding and added transformative office space to our facility that enables us to provide “whole-healthcare” to our patients, staff and community members.

We continue to be deeply grateful for the extraordinary generosity of the Trager Family and Republic Bank Foundations, helping make the Trager Institute a leader in the healthcare ecosystem. Your support and shared vision is helping us transform the aging experience.

REPUBLIC BANK FOUNDATION OPTIMAL AGING CLINIC

The Republic Bank Foundation Clinic is a truly state-of-the-art clinical facility in Louisville’s Innovation Corridor. Our providers, who include MDs, NPs, RNs, LCSWs, LMFTs and CSWs along with an enthusiastic medical staff, met the extraordinary challenges in 2020 and came together to provide optimal care to patients of varied age groups and racial/geographic populations than even our most ambitious plans had projected. Our clinic also became a Behavioral Health Service Organization that allowed us to provide mental health services to our patients and focused on the Medicaid population.

Since December 1, 2019, we have seen 2538 unique patients across 8713 visits. Of those patients:

- 35% represented an underserved group
- 32% were from a disadvantaged Louisville neighborhood
- 10% were from rural counties in Kentucky and Indiana
- 48% received specialized geriatric care
- 52% received quality, whole health and preventative care
- 34% received specialized mental health services

AGING HEALTHCARE ECOSYSTEM PARTNERSHIPS, RESEARCH & COMMUNITY BASED PROGRAMS

Healthcare ecosystem connections, research and community-based programs are anchored in our strategic plan. In 2020, TeamTrager, as we call ourselves, worked closely with Trilogy Health Services, to provide infection disease containment education related to Covid-19 to all 116 of their nursing homes in 5 states, in response to the disproportional COVID-19 deaths in nursing homes. This relationship will continue to grow as we have been asked to provide future education to their workforce and residents.

Our research grant development increased over the year with our reach expanding from Louisville to rural Kentucky influencing healthcare systems in more than 7 disparate regions in the Commonwealth. We launched a weekly Covid-19 webinar to help our community navigate the pandemic, established a national Project Echo addressing healthcare issues, established a caregiver support groups, provided support to older adults with depression through our PEARLS program, launched MicroClinics – a health management program, and we are getting ready to begin a weight loss program.

GROWING PHILANTHROPY

We would like to thank the Trager Family for their extraordinary philanthropic leadership, inspiring us all. Since the naming gifts were announced, we have raised over millions in new philanthropic gifts, commitments and grants in support of our work at the Trager Institute and Republic Bank Foundation Clinic.

It is our pleasure to share with you a detailed reporting of our accomplishments this past year, honoring the life and legacy of philanthropist and Republic Bank Founder, Bernard Trager.

Sincerely,

The UofL Trager Institute Leadership Team



Anna Faul, PhD
Executive Director



Christian Furman, MD, MSPH, AGSF
Medical Director



Joseph D'Ambrosio, PhD, JD, LMFT, CSW
Director of Wellness



Pamela Yankeelov, PhD
Director of Research

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PHILANTHROPIC GIFTS & COMMITMENTS AS OF NOVEMBER 2020

PHILANTHROPIC FUNDING

(JANUARY 2019-DECEMBER 2020)

Trager Family Foundation	\$2,500,000
Republic Bank Foundation	\$2,500,000
Additional Major Gifts & Commitments	\$1,345,000
<ul style="list-style-type: none"> ▪ Jack C. Wright, M.D. Endowed Professorship on Aging ▪ Hosparus Health ▪ Drs. Patricia G. and Laurence N. Benz 	
AARP	\$9,000
Retirement Research Foundation.	
Decision Coaching Guide for Adults with Unaddressed Hearing Impairment	\$112,500
“Raise Some L” 2019	\$2,679
“Raise Some L” 2020	\$1,050
Annual Fund	\$1,465

FEDERAL FUNDING

(JANUARY 2019 – December 2020)

Health Resources & Services Administration (HRSA)	\$9,370,000
Health Resources & Services Administration (HRSA) Geriatric Workforce Enhancement Program (core)	\$650,000
Health Resources & Services Administration (HRSA) Geriatric Workforce Enhancement Program (ADRD)	\$105,000
Health Resources & Services Administration (HRSA) Geriatric Workforce Enhancement Program COVID	\$90,625
American Association of Retired Persons – VISTA AARP Support	\$4,000
National Family Caregiver Program Title III-E	\$85,581
Health Promotion and Disease Prevention Title III-E	\$9,916
Health Resources & Services Administration (HRSA) Behavioral Health Workforce Education and Training Program (BHWET)	\$480,000

ECHO National Nursing Home COVID-19 Action Network	\$1,200,000
Health Resources & Services Administration (HRSA)	
Geriatric Academic Career Award (GACA)	\$76,200
ADDITIONAL PHILANTHROPIC SUPPORT PRIOR TO NAMING	\$6,452,400
Margaret Dorward Smock Endowed Chair in Geriatric Medicine	
Gheens Foundation Visiting Scholar Endowment Fund	
Legacy/Planned Gift	
TOTAL PHILANTHROPIC & FUNDING FEDERAL	\$24,995,416

PHILANTHROPIC FUNDING PRIORITIES

AGING HEALTHCARE ECOSYSTEM PARTNERSHIPS

A key focus for us this past year was to engage the Louisville Healthcare CEO Council in supporting the work that is being done at the Trager Institute. Dr. Anna Faul strategically positioned herself as a member of the Louisville CEO Council Aging Innovation Planning Committee and worked to develop a good relationship with Tamny York Day, President & CEO of the council. Dr. Faul was also instrumental in getting the Trager Institute recognized in the CEOs Innovation Summit for 2020.

Our strategic plan specifically has identified areas of interest to CEO Council members that position us for mutually beneficial partnerships. Because of the strong focus on research and interdisciplinary collaborations the Trager Institute is well-suited to provide innovative research and evaluation in clinical practice, collaborative research and inter-professional education and workforce development to CEO Council members to address the emerging needs of our aging population. In 2020 we were successful in partnering with Trilogy to provide infectious disease education to their network of nursing homes. This successful collaboration is leading to other training opportunities as well as increasing the potential for philanthropic gifts.

Dr. Faul, the leadership team of the Institute, as well as the University of Louisville Development Office will continue to nurture relationships with CEO Council members in an effort to bring philanthropic support to the Institute.

IMMEDIATE FUNDING PRIORITIES

ELDER LAW CLINIC – PARTNERSHIP WITH BRANDEIS SCHOOL OF LAW

Funding opportunity: \$2,500,000 endowed faculty position for supervising attorney who meets Kentucky Bar Association standards. (\$100,000 estimated annual budget)

Research shows poor health outcomes for those who face legal challenges due to socio-economic factors, such as immigration status, domestic violence, and poverty. Based on Republic Bank Foundation Optimal Clinic demographics, over 50% of patients come from traditionally underserved areas of our community. This new program will provide practical experience and training for Brandeis School of Law students with interest in healthcare law, who will represent Republic Bank Foundation Optimal Aging Clinic patients under faculty supervision.

In 2020 the Trager Institute received a gift of \$9,000 from AARP to purchase the equipment necessary for the operation of a legal clinic. The Elder Law Clinic is scheduled to open in 2021 pending post Covid-19 restrictions.

COMMUNITY TRAINING KITCHEN-PARTNERSHIP WITH THE UOFL SCHOOL OF MEDICINE AND SCHOOL OF PUBLIC HEALTH

Funding opportunity: \$1 million for appliances, construction and program support.

Based on estimated value of appliances, related construction costs, curriculum development

Research shows that good nutrition not only promotes overall health and well-being, but also plays an essential role in preventing, managing, and even resolving chronic health conditions. The curriculum for the Trager Institute Community Training Kitchen will be based on the Goldring Center for Culinary Medicine at Tulane University, one of the leading culinary medicine programs in the country.

In 2020 the General Electric Company committed to donate appliances for the buildout of the kitchen. The Community Training Kitchen- partnership with the UofL School of Medicine and School of Public Health is scheduled to open in 2021.

The University of Louisville will partner with Sullivan University's culinary arts program faculty to provide hands-on training for our medical students, as well as continuing education for healthcare and foodservice industry professionals for the benefit of our community.

LONG-TERM FUNDING PRIORITIES

FLOURISHCARE™ PROGRAM

Funding opportunity: \$27.5 million to establish permanent, endowed support for Trager Institute Leadership and other University of Louisville faculty, dedicated to elder care research and practice

At the Republic Bank Foundation Optimal Aging Clinic, patients receive a host of services rarely found in traditional clinics and private practices. That is because we at the UofL Trager Institute believe that optimal aging is less about treating illness and much more about promoting overall wellness.

The FlourishCare™ model, developed at the Trager Institute, assesses not only biological determinants of health, but also the functional and quality of life factors that affect our patients, including psychological, social, environmental, and individual health behaviors that contribute to a patient's well-being.

In order to fully realize our FlourishCare™ vision, dedicated funds for our University of Louisville faculty partners across the Health Sciences and Belknap campuses are needed to ensure that they have the time and resources to coordinate activities at the Trager Institute.

To help attract and retain University of Louisville faculty dedicated to aging-related research and practice, our top long-term priority is to raise funds to establish new endowed faculty positions, including:

UofL Trager Institute Leadership

- UofL Trager Institute Executive Director Endowed Chair-Gerontologist-\$5 million
- UofL Trager Institute Research Director Endowed Chair-\$5 million
- UofL Trager Institute Wellness Director Endowed Chair-\$5 million

UofL Faculty Partners

- UofL Brandeis School of Law Endowed Professorship-\$2.5 million
- UofL Kent School for Social Work Endowed Professorship-\$2.5 million
- UofL School of Nursing Endowed Professorship \$2.5 million
- UofL Speed School of Engineering Endowed Professorship \$2.5 million
- UofL School of Public Health Endowed Professorship \$2.5 million

FACILITY IMPROVEMENT

In our effort to provide a “one-stop shop” for healthcare we continued the build-out of our lower level and have opened the pathway for Frazier Physical Therapy to join us in 2021. Our footprint increased from 8,684 sq ft to 17,803 sq. ft. in 2020 which now allows us to provide “whole health” to our patients, the community, our colleagues and staff. We continued to utilize “Lean” principles of architectural healthcare design in the lower



level that adds value by eliminating waste from existing processes, improves workflow, maximizes efficiency, enhances staff and patient experiences and improves the bottom line.

Lower Level, Fall 2020

The Trager Institute now includes the Republic Bank Foundation Optimal Aging Clinic which consists of 11 medical offices, a fully functional clinical lab, a preceptor room for our learners (medical students, residents, fellows, and Nurse Practitioner students) and a fully accessible bathroom. The staff of the medical team is positioned in a central open workspace close to the clinic. The upper level also houses the UoFL Trager Institute’s unique glass-enclosed shared executive office, a telehealth conference room, and a central work area for research and community projects.

The lower level consists of a student and community training area that can accommodate up to 80 learners and participants, a law clinic, an acupuncture office, a massage therapy office, six behavioral health offices, and a yoga/meditation room and a wellness area that includes state of the art exercise equipment. The amenities in our facility will allow our patients to receive Lifestyle Medicine prescriptions that focus on preventative care and disease prevention.

One of our big goals for 2021 is to build out the Frazier Physical Therapy outpatient clinic in the temporary training area that was on the first floor, and to complete the buildout of our culinary medicine kitchen so that future healthcare providers, patients, staff, colleagues and community can learn how to cook for your health. We are working closely with General Electric to fund the appliances needed.



Upper Level, Fall 2020

MEDIA APPEARANCES: NEWS RELEASES & ARTICLES

The UofL Trager Institute and Republic Bank Foundation Optimal Aging Clinic appeared in numerous media outlets over the past year. Below is a list of news releases and articles that were published in 2020.

NEWS RELEASES

1. Experts on aging launch virtual information session on coronavirus and the disease it causes, COVID-19
2. Experts on aging to speak at nationwide conference
3. UofL professor provides insight on importance of strengthening mental health in time of physical isolation and uncertainty
4. Delivering health care through a new lens: smart glasses
5. UofL Trager Institute poised to expand mental health support through new licensure as a Behavioral Health Service Organization
6. Reducing social isolation for older adults through technology innovation
7. Launch of acupuncture services addresses wellbeing of older adults, health care providers and caregivers
8. Professor Emeritus among honorees of optimal aging awards
9. UofL Trager Institute to provide training to improve COVID-19 preparedness in nursing homes as part of national network
10. UofL Optimal Aging Clinic offers mental health and problem-solving assistance for older adults
11. UofL Trager Institute and UofL Logistics and Distribution Institute collaborate to establish safe COVID-19 clinic operations



Articles and Ads



ARTICLES AND ADS

12. Optimal Aging Conference – MD Update
13. Anna Faul's mission to change how we think about aging and death – Business First
14. UofL doctors answer coronavirus questions during virtual summit – WAVE3
15. Social isolation puts seniors' health at risk. The coronavirus is cutting them off further – Courier Journal
16. Understanding differences between coronavirus and allergies amid pandemic – WAVE3
17. HEN member companies pivot strategies during COVID-19 – Medical News
18. Gold Standard Honorees – The Record
19. Where integrative health care meets compassion – Today's Transitions
20. Empowered to Flourish – UofL Magazine



2020 FINANCIAL SUMMARY

EXPENSE DESCRIPTION	REPUBLIC BANK FOUNDATION CLINIC	TRAGER FAMILY FOUNDATION	TOTAL EXPENSE
Construction/Renovation	\$83,333	\$83,333	\$166,666

Construction and Renovation: Xtreme Construction oversees the construction and renovation work, starting January 2019. The full contribution of funds given to the Institute in 2020 was used to continue supporting the buildout in the basement.

ENDOWMENT DESCRIPTION	REPUBLIC BANK FOUNDATION CLINIC - MARKET VALUE- 10/31/20	TRAGER FAMILY FOUNDATION – MARKET VALUE AS OF 10/31/20	TOTAL TRAGER/ REPUBLIC BANK ENDOWMENTS – MARKET VALUE 2020
Construction/Renovation	\$247,826.04	\$247,826.04	\$495,652.08

* Market value source: UofL Foundation Funds Report: posted as of 10/31/20.

THE REPUBLIC BANK FOUNDATION OPTIMAL AGING CLINIC GUIDING PRINCIPLES

The Republic Bank Foundation Optimal Aging Clinic is a primary care and specialized geriatric medicine clinic providing patients whole health care utilizing the FlourishCare™ model of care. Traditional models of care focus on the biological determinants that are disease and setting specific and do not fully account for functional and quality of life factors that affect patients. FlourishCare™ assesses biological determinants and also looks at psychological, social, environmental, health services and individual health behaviors which, together, predict if a patient is flourishing in spite of chronic disease. We believe that optimal aging is more than treating illness with medication. FlourishCare™ is an evidence-based model of patient care, developed at the Trager Institute.

The following services are currently provided at the Republic Bank Foundation Optimal Aging Clinic or will be provided upon completion of the lower level in 2020:



Annual Wellness Visits:

An annual, comprehensive health assessment designed to improve our patients' overall wellness with an emphasis on disease prevention.



Wellness/Lifestyle Medicine:

Whole health approaches tailored to help patients achieve health and well-being, for example Yoga & Tai Chi, Nutrition Counseling & Classes, Mindfulness Classes and Genomics Testing.



Medication Management:

Our team of experts work with patients and their families to ensure medications optimize patients' health and well-being.



Chronic Disease Management:

We provide an integrated care approach that prevents or reduces the effects of chronic conditions such as chronic obstructive pulmonary disorder, heart disease, and diabetes.



Approaches to Pain Management:

Providing patients with effective in-house services to manage chronic pain, for example Acupuncture, Massage Therapy, Yoga & Tai Chi and Mindfulness Classes.



Palliative Care:

Our interdisciplinary team provides specialized care that focuses on relieving symptoms, pain, and the physical/mental stress of serious illnesses.



Falls Prevention:

We provide a comprehensive approach to reduce patients' fall risk through services and programs that improve patient balance and strength.



Mental Health Support:

In coordination with our whole health approach, we offer individual and group counseling services for depression, anxiety, trauma, etc.



Brain Health and Dementia:

We offer leading-edge programs to both support our patients' long-term brain health and help prevent and reduce the symptoms of dementia.



Elder Law Clinic:

In-house legal consultation focusing specifically on legal needs later in life such as Advance Care Planning, Estate Planning, Living Wills, Immigration needs, and Guardianship and related matters.



Friends and Family Resources:

We provide resources, support groups, and other services to patient friends, families, & caregivers.

NUMBER OF COMMUNITY MEMBERS SERVED IN CLINIC

The Republic Bank Foundation Optimal Aging Clinic was able to provide quality and comprehensive healthcare services to our community despite COVID-19. We were one of the first clinics at the University that was able to convert all appointments to telehealth and keep serving our patients. As can be seen from the table below, we were very busy and had almost 9,000 appointments with patients. We also became a Behavioral Health Organization and was able to provide emotional and behavioral health support via telehealth to many individuals who were struggling during the isolation created due to COVID-19.

PATIENT & APPOINTMENT TOTALS

Patients served	2538	
# of Appointments	8713	
# of Future Appointments booked	1298	

DEMOGRAPHICS OF PATIENTS SERVED

GENDER		
Female	1782	70%
Male	755	30%
RACE AND ETHNICITY		
Non-Hispanic Black	751	30%
Non-Hispanic White	1670	65%
Other	116	5%
AGE		
Age 18-49	739	29%
Age 50-64	575	23%
Age 65+	1223	48%

PATIENT GEOGRAPHIC LOCATION

West Louisville	706	28%
South Louisville	351	14%
East Louisville	980	39%
Rural Kentucky Counties	258	10%
Indiana & Other States	242	10%

PROVIDERS

NAME	SPECIALTY
PROVIDERS IN CLINIC	
Elizabeth "Beth" Ackerman	
Beverly Williams Coleman, DNP	Nurse Practitioner
Joseph D'Ambrosio, PhD	Licensed Marriage and Family Therapist
Peter Esch, MD	Geriatrician

Christian Davis Furman, MD	Geriatrician
Josephine Gomes, MD	Geriatrician
Andrea and Colby Helton, L.Ac	Acupuncturist
Angela Leinenbach, DNP	Nurse Practitioner
Benjamin Mast, PhD	Psychologist
Meredith Mendez	RN, for Annual Wellness Visits
Laura Morton, MD	Geriatrician
Amy Picklesimer, MSSW	Licensed Clinical Social Worker
Lahoma Prather, DNP, RN	RN Specialist
Christopher Shafer, MD	Neurologist
Mary Skinner, DNP	Nurse Practitioner
Ronnita Usher, DNP	Nurse Practitioner
Amy Varner, NP	Nurse Practitioner
Connie Vice	RN, for Annual Wellness Visits
Elizabeth Volpert, DNP	Nurse Practitioner
FELLOW IN CLINIC	
Jaseena Elikkottil, MD	Geriatric Medicine Fellow
FLOURISH CARE SPECIALISTS	
Paton Kruer, MSSW	Clinical Social Worker
Kennette Rightnour, MSSW	Clinical Social Worker
Alison Hanlein, MSSW	Clinical Social Worker
Dena Wilson, MSSW	Clinical Social Worker
Leo Bowman, MSSW	Clinical Social Worker

UOFL TRAGER INSTITUTE NEW & ONGOING COLLABORATIONS

The unduplicated headcount for our student trainings since December 2019 was 1456 representing approximately 700 student learners from a range of disciplines. Collectively, they participated in over 751 interprofessional training sessions addressing the needs of older adults. Many of our student learners participated in multiple training opportunities spanning virtual, asynchronous to synchronous trainings. Eighty-seven undergraduate and graduate social work, counseling psychology and DNP-psychiatric students participated in five online interdisciplinary module trainings, two interdisciplinary case management experience role simulations, multiple Project ECHO tele-mentoring interdisciplinary trainings, weekly Wednesday training events and weekly complex case conceptualization team trainings throughout the year. The medical, nursing, dental and dental hygienists, and pharmacy students had varying immersive experiences at the Trager Institute depending on their curriculum plans or scheduling availability. Nursing and dental and dental hygienist students participated in all five online modules and at least one interdisciplinary case management experience role simulations, while the medical students participated in one interdisciplinary case management experience. The pharmacy students from Sullivan participated in the 5 modules, at least one interdisciplinary case management experience, at least one complex case conceptualization team meeting and multiple Project ECHOs sessions. The Institute offered 29 interdisciplinary case management experience role simulations, 24 Project ECHO, tele-mentoring interdisciplinary trainings, 53 Wednesday training events, and 34 complex case conceptualization team trainings. Topics across these trainings include but not limited to, optimal aging, Alzheimer's Disease, Opioid Risk Management and alternate pain management interventions, Veteran benefits, behavioral health therapeutic interventions, Annual Wellness Visits, care coordination, chronic disease management, cultural competency, advance care planning, elder law, and spirituality.

In 2020, the UofL Trager Institute provided 130 community or professional trainings potentially reaching 2906 faculty, community members and caregivers. The trainings included a wide range of topics including Microclinics, My Health Matters, advanced care planning and end of life events, FlourishCare trainings, mental health, optimal aging, lifestyle medicine and Age-Friendly Louisville presentations. We participated in two TV shows about our work with an estimated reach of at least 2000 people with these shows. While we were not able to travel to conferences due to COVID-19, we did virtually present several posters, papers and symposiums at 3 national conferences (e.g., Council on Social Work Education, Gerontological Society of America, American Association of the Colleges of Pharmacy) on our workforce development, state and international practice transformation work, and FlourishCare practice model.

We reached 1269 individuals in our COVID-19 community updates across 31 sessions which started out as weekly updates for the first 6 months later evolving into every other week updates. Each COVID-19 session included a report on the status of positivity rates, deaths and mandates in Kentucky, followed by expert speaker addressing COVID-19's impact on a variety of issues, specifically the lay and family caregivers, social media, senior crime victim programs, co-immunity project, dining out, disparities in the African American community, future of work, anxiety, long term care facilities, telehealth, compassionate care, faith-based communities, Spanish Flu, vaccine development status, housing, contact tracing, logistics and distribution, grief, loneliness, technology, voting, wastewater and much more.

We reached 405 individuals with our Project ECHOs focused on the care of older adults, opioid risk management and alternate pain management strategies. We also offered mindfulness sessions, tai chi and low impact exercise virtual online classes serving approximately 30 people. Our caregiver programming also offered 357 units of service including case management, counseling, support groups, and training to 32 clients, while our PEARLS program for community dwelling older adults with mild to severe depression provided 76 units of service.

In 2020, we served as one of our nation's Project ECHO Training Centers for the ECHO National Nursing Home COVID-19 Action Network. Each training center collaborated with Agency for Healthcare Research and Quality (AHRQ), Project ECHO and the Institute for Healthcare Improvement (IHI) to advance improvements in COVID-19 preparedness, safety and infection control in nursing homes. Our official

training center served 254 nursing homes from Kentucky, Indiana, Michigan, Ohio, and Tennessee. Over 100 of our nursing homes were from Trilogy and we worked with Todd Schmiedeler, Chief Engagement & Innovation Officer at Trilogy Health Services, to establish a specific protocol to meet their healthcare company's unique needs. We held 36 Project ECHO 60 minute sessions with a minimum of 2 nursing home representatives (e.g., medical directors, directors of nursing, infectious disease control experts, CNAs, nurses, etc) per each nursing home reaching 508 learners. Learners also completed a weekly, 30-minute pre-session self-paced, online module representing an additional 6 training instances. We held one additional ECHO session on vaccines that was associated with our nursing home project and opened to the public yielding over 225 learners.

INTERNAL COLLABORATIONS WITH THE UOFL SCHOOL OF MEDICINE

Dr. Anna Faul, Executive Director of the Institute, meets monthly with the Dean of the School of Medicine to strategically plan the engagement of the Medical School in the work that is done at the UofL Trager Institute and the Republic Bank Foundation Optimal Aging Clinic.

DEPARTMENT OF FAMILY & GERIATRIC MEDICINE

The Republic Bank Foundation Optimal Aging Clinic functions under the Department of Family and Geriatric Medicine. Geriatric Medicine faculty and fellows provide clinical services on-site at the Clinic. Two additional Geriatric Medicine faculty and four nurses work off-site in nursing homes and in area hospitals. Internal and family medicine residents rotate through the Clinic during their Geriatric Medicine rotation. Medical students who are rotating in Family Medicine receive their didactics in Geriatric Medicine at the UofL Trager Institute.

DEPARTMENT OF NEUROLOGY

We are working closely with the Department of Neurology in order to provide services to their patients with dementia, movement disorders and psychological non-epileptic seizures. One of their physicians and nurses are placed in the clinic two days a week to provide health care services, with warm handoffs to the behavioral health clinicians and students for therapeutic interventions.

FRAZIER REHAB

We developed a new initiative with Frazier Rehab who will build out an outpatient clinic for physical therapy within our space comprising of 2000 square feet on the first floor. This will help support our mission of whole health care in one place for older adults.

CULINARY MEDICINE

We are partnering with Dean Toni Ganzel and the School of Medicine to initiate a Culinary Medicine Course for medical students to learn how to integrate nutrition into their practices. A new demonstration kitchen is planned with 5 stations that can accommodate 28 learners. The kitchen will also be used for cooking demonstrations for patients, community members and guests, using local chefs, with the ability to use web technology to broadcast these demonstrations. We are currently fundraising to complete the kitchen.

AUDIOLOGY

The School of Medicine's Audiology Division is partnering with the Republic Bank Foundation Optimal Aging Clinic to help address the fact that many older adults screened for hearing loss at traditional primary care practices do not receive adequate follow up from an audiologist if hearing impairment is identified. Funding from the Retirement Research Foundation is used for a study, determining the type of screening experience that triggers take-up of a decision coaching guide following a failed hearing screen.

TELEHEALTH

Dr. Faul joined a telehealth scholarship interest group consisting of faculty across the *School of Medicine*. The focus is to evaluate the new telehealth focus of healthcare within the University of Louisville Healthcare System. Specifically, she worked with the Associate Dean for Rural Health Innovation, the Director of Instructional Technology, the Emergency Medicine Department, and the Medical Education office to develop a pilot project to test the use of smart glasses for educational purposes during COVID but also for health care delivery.

COVID-19 LONGHAULERS CLINIC

The *Associate Dean of Research* at the School of Medicine and the *Christina Lee Brown Envirome Institute* requested our support in starting a longitudinal COVID-19 clinic at the Republic Bank Foundation Optimal Aging Clinic. We are starting this clinic in January 2021 for any patient in KY who tested positive for COVID-19. The goal is to track long term symptoms. Currently we are collecting pilot data and will apply for NIH funding to support this clinic long term.

WORKFORCE DEVELOPMENT

Medical residents and fellows are an integral part of two of our workforce development grants, funded by the U.S. Department of Health and Human Services. Two grants support training and education of doctors who will eventually work within an interdisciplinary team of healthcare providers.

Our Geriatric Workforce Enhancement Program is focused on the training and development of a health care workforce that maximizes patient and family engagement and improves health outcomes for older adults by integrating geriatrics with primary care.

Our Behavioral Health Workforce and Education Training Program develops and expands the behavioral health workforce service populations across the lifespan by integrating students and interns into primary care to provide much needed behavioral health services.

FLOURISHCARE™ CURRICULUM

As part of our work on these grants, we have developed the FlourishCare™ Curriculum that consists of 5 online modules addressing interdisciplinary care assessment and chronic disease management. The curriculum also includes weekly workshops for learners on variety of topics, including working with patients who have limited health literacy, compassionate care for persons with Alzheimer's disease, duty of care and dignity of risk, interdisciplinary collaborative teams, opioid use, motivational interviewing, mindfulness-based cognitive behavior therapy, professionalism in healthcare, electronic health records, chronic care management, advance care planning, Spanish language and cultural workshops, microclinics and self-care, and case conceptualizations. In 2019, we held 35 case conceptualization workshops with a group of interprofessional learners using existing patients from the Republic Bank Foundation Optimal Aging Clinic to develop care plans, and we delivered 42 workshops.

ICME

We also developed the Interdisciplinary Case Management Experience (ICME) to support the development of interdisciplinary care planning using standardized patient videos and role-plays.

CRIT

We developed the Clinical Retreat for Interprofessional Training (CRIT) in Geriatrics and Palliative Care, a two-day conference teaching geriatrics and palliative care to physicians, social workers, nurses, pharmacists and community health workers. From the School of Medicine CRIT is normally attended by faculty and learners from Family Medicine, Internal Medicine, General Surgery, Urology, Psychiatry, Physical Medicine and Rehabilitation, Podiatry, and Emergency Medicine.

INTERNAL COLLABORATIONS WITH OTHER SCHOOLS

SCHOOL OF NURSING

We now have three APRNs working in our clinic that are faculty at the School of Nursing. Also, we have become one of the few community sites where nursing faculty can send their nursing students for internships. This year, undergraduate nursing students are taking part in our remote patient monitoring program – funded with CARES ACT money. In addition, we also provide internships to 4 DNP students with a living stipend funded by HRSA.

KENT SCHOOL OF SOCIAL WORK

Kent School is a close partner and provide every year a large group of social work students to the Institute who provide services to community members. Students receive either a tuition scholarship or a living stipend funded by HRSA.

COLLEGE OF EDUCATION AND HUMAN DEVELOPMENT

We collaborate with the Department of Education and Counseling Psychology Program to provide internships to 5 students every year with a living stipend funded by HRSA.

SCHOOL OF DENTISTRY

The undergraduate dental hygiene and graduate dental students rotate through our clinic to take part in our educational workshops and ICMEs (Interprofessional Case Management Experiences).

BRANDEIS SCHOOL OF LAW

Law students will provide free legal services to low-income older adults (aged 50+) and/or clients' family members. Services will focus on advance planning for incapacity (including Powers of Attorney and Living Wills/Health Care Surrogates), simple estate planning, guardianship and related matters, medical assistance for long term care, settlement of estates with limited assets/small estates, and grand-parenting issues. Students will also provide community presentations on elder law issues. Students will interview clients, conduct the necessary factual investigation and legal research for their cases, draft legal documents.

SPEED SCHOOL OF ENGINEERING

Our partnership with the School of Engineering has grown exponentially due to COVID-19. Apart from the capstone projects with the Department of Electrical and Computer Engineering, we also now have capstone projects with the Department of Computer Engineering (developing an app for a smartphone), and another new project where we are developing a more comfortable version of smart glasses. Also, we collaborated with the Logistics and Distribution Institute to write grant applications related to contact tracing, and one of their PhD students did a simulation study in our clinic to help us determine how many people can safely be in the clinic at one time.

SCHOOL OF ARTS AND SCIENCES

We have partnered with the Department of Psychology, specifically Dr. Mast, to provide neuropsych testing for dementia patients at the Republic Bank Optimal Aging Clinic. Currently this service is only available at one clinic in Louisville, with a waiting list of 6 months. With us now offering this service, we will fulfill a very important need in the community.

COLLEGE OF BUSINESS

We had a UofL MBA intern again in Marketing and Business Development that provided great support to our marketing team.

SCHOOL OF PUBLIC HEALTH

We have a School of Public Health intern in our clinic who is support the Faculty-in-Residence, Tom Walton, in strategic financial planning for the OAC.

EXTERNAL COLLABORATIONS

AARP KENTUCKY

The collaboration with AARP provides the UofL Trager Institute a vast state-wide and national audience for the programs and interventions developed at the Institute.

ALZHEIMER ASSOCIATION OF KY

The collaboration with the Alzheimer Association of KY allows the UofL Trager Institute to expand its services and reach to those people affected by Alzheimer's Disease and related Dementias. This partnership also allows us to promote our caregiver grant which provides services to caregivers of Alzheimer patients.

AREA AGENCY ON AGING AND INDEPENDENT LIVING

The collaboration with all the Area Agencies on Aging and Independent Living (AAA/IL) statewide will help spread the FlourishCare™ curriculum throughout the state and teach more service providers about care coordination and whole health care.

BAPTIST HEALTH CORBIN AND PIKEVILLE MEDICAL CENTER EMERGENCY DEPARTMENTS

In the poor and vulnerable rural areas of Kentucky, specifically the Appalachian Mountains, older adults frequently visit the emergency departments for their primary care needs, rather than going to a clinic or a primary care practice. The purpose/goal of our partnership with these rural medical center emergency centers is to help integrate older adults into the healthcare system, creating a quality age-friendly first entry experience for these patients.

CONFLUENT HEALTH'S EVIDENCE IN MOTION (EIM) INSTITUTE OF HEALTH PROFESSIONALS

As part of age-friendly health care systems, it is important to pay close attention to mobility. This partnership helps ensure that services are provided to our community that will prevent falls and alleviate balance risks. Confluent Health transforms physical health by meeting the needs of patients through focusing on achieving long lasting outcomes without surgery, medication or diagnostic imaging.

ECHO INSTITUTE™

This partnership is used to train and educate nursing homes across the training in COVID-19 Infection Control.

HENDERSON SETTLEMENT

This partnership in the Appalachian region supports community-based programs and training. It also supports the delivery of care coordination and community health navigation services in an underserved area of KY.

KENTUCKY ASSOCIATION OF GERONTOLOGY (KAG)

The collaboration with the Kentucky Association of Gerontology (KAG) gives the UofL Trager Institute access to all 15 Area Development Districts throughout the Commonwealth. This group directs all state and federal support for indigent patients. This collaboration allows the UofL Trager Institute to have a statewide presence in marketing FlourishCare™ and training to Area Development District personnel on programs and initiatives promoted by the Institute.

KENTUCKY ASSOCIATION OF HEALTH CARE FACILITIES AND LEADINGAGE

We developed a partnership with KAHCF and LeadingAge to help recruit nursing homes for the ECHO National Nursing Home COVID-19 Action Network series.

KENTUCKY ASSOCIATION OF SOCIAL WORK EDUCATORS (KASWE)

The collaboration with the Kentucky Association of Social Work Educators (KASWE) will help us spread the FlourishCare™ curriculum throughout the state and teach more future social workers about care coordination and whole health care.

KENTUCKY MEDICAL DIRECTORS ASSOCIATION (KMDA) – POST-ACUTE AND LONG-TERM CARE

Our partnership with KMDA aligns us with an association of physicians, nurse practitioners, social workers, and health care professionals who work in post-acute and long-term care. This relationship provides connections with many local medical directors of continuing care retirement communities.

LOUISVILLE METRO GOVERNMENT

The collaboration with Metro Government firmly places the UofL Trager Institute within the strategic initiatives of the city. Keeping close ties to local government ensures that the Institute is highlighted in local, regional, national and international city initiatives.

MERCY MEDICAL

Training and development of a health care workforce that maximizes patient and family engagement and improves health outcomes for older adults by integrating geriatrics with primary care and creating age-friendly, culturally appropriate health systems.

PRESBYTERIAN HOMES AND SERVICES OF KENTUCKY

Kentuckians are living longer and living with a broader spectrum of abilities and challenges. Older adults deserve care that is as dynamic and as unique as they are. Westminster Apartments and its support services will provide that care. The satellite Republic Bank Foundation Optimal Aging Clinic will bring expert primary care and specialized life-long and aging wellness programs to the Presbyterian Homes community. Strategically, this partnership is helping the Institute move towards the goal of becoming a nationally recognized clinical network hub for wellness and optimal aging. Students working at the satellite clinic will have the opportunity to have housing within the Westminster Apartment complex, an important strategy to promote healthy intergenerational aging in communities.

PRIMARY CARE PRACTICES IN RURAL KENTUCKY

The mission of the Trager Institute is to train, development, and ultimately place a health care workforce that understands how to maximize patient and family engagement and improve health outcomes for older adults by integrating geriatrics with primary care and creating age-friendly health systems.

SIGNATURE HEALTHCARE

This partnership is being used to develop and test a compassionate care curriculum in a nursing home system.

SULLIVAN UNIVERSITY

The rationale for our collaboration with Sullivan University is to provide access to healthcare-related faculty and programs not currently offered at the University of Louisville. It is important to have pharmacists as part of the care team as medication overprescribing and medication mismanagement is a major concern in health care, specifically related to older adult care. Also, a nutrition focus is needed when whole health is addressed.

TRILOGY

Trilogy partnered with us to deliver the ECHO National Nursing Home COVID-19 Action Network series to all of their nursing homes across three states.

UNIVERSITY OF PIKEVILLE MEDICAL AND SOCIAL WORK SCHOOLS, WESTERN KY SCHOOL OF SOCIAL WORK & CAMPBELLSVILLE SCHOOL OF SOCIAL WORK

Through these partnerships the Trager Institute is helping train and develop a health care workforce that maximizes patient and family engagement and improves health outcomes for older adults by integrating geriatrics with primary care and creating age-friendly health systems.

COMMUNITY OUTREACH

OLDER ADULT CAREGIVER SUPPORT GROUP (OACS)

The collaboration with the Older Adult Caregiver Support Group (OACS) allows the UofL Trager Institute to be fully engaged with UofL employees, who are caring for older adult loved ones. This group provides an opportunity for caregivers to find support from other caregivers, learn about caregiving resources, and attend caregiver events.

KENTUCKY COALITION FOR HEALTHY COMMUNITIES (KCHC)

The Kentucky Coalition for Healthy Communities, created by the UofL Trager Institute, is a community-based coalition that seeks to develop the social networks and resources needed to promote geriatric workforce development in rural communities. The goal of KCHC is to increase the rural community supports that help older adults lead healthier lives.

PROJECT ECHO

Project Echo® (Extension for Community Healthcare Outcomes), is a tele-mentoring movement, dedicated to sharing knowledge and best practice care for underserved people. Through the implementation of Project Echo, the UofL Trager Institute is working to grow the size of the geriatric's workforce. The UofL Trager Institute has launched education tracks to disseminate the best practices in the care of older adults to the primary care and other health providers currently working in rural communities.

GOLD STANDARD OF OPTIMAL AGING RECOGNITION LUNCHEON

The annual Gold Standard of Optimal Aging celebrates adults age 85 years and older, who lead engaged and flourishing lives. This annual event brings in over 500 participants and has become the major older adult event in the Kentuckiana area, garnering statewide coverage.

OPTIMAL AGING MONTH

Louisville Mayor Greg Fischer has proclaimed September to be Optimal Aging Month which prompts us to reflect on what it means for us to flourish throughout our lives and take needed steps as individuals and as a community to achieve healthy aging goals.

ALZHEIMER'S DISEASE AND RELATED DEMENTIAS (ADRD) INITIATIVE

The ADRD initiative was established by the UofL Trager Institute to fill the void that is prevalent in statewide training of caregivers of older adults. The Commonwealth only requires minimal elder care training requirements that are well below the national level of education needed to provide quality health services to older adults. This initiative allows us to have a statewide reach in training caregivers of older adults.

TITLE III-E: NATIONAL FAMILY AND KENTUCKY CAREGIVER SERVICES

The Kentuckiana Regional Planning Development Agency (KIPDA) contracted with the UofL Trager Institute to deliver the Caregiver Support Program for individuals caring for loved ones living in the rural counties of Bullitt, Henry, Oldham, Shelby, Spencer, and Trimble.

TITLE III-D: DISEASE PREVENTION AND HEALTH PROMOTION SERVICES

The Kentuckiana Regional Planning Development Agency (KIPDA) contracted with the UofL Trager Institute to support lonely adults struggling with late-life depression within the KIPDA region.

AGE-FRIENDLY LOUISVILLE

Age-Friendly Louisville is led in partnership by the UofL Trager Institute, Louisville Metro Government, AARP Kentucky, and the Kentuckiana Regional and Planning Development Agency. The UofL Trager Institute and agencies work closely with Metro Louisville to ensure that aging is part of all government actions that affect the citizens of our city.

LOUISVILLE COMPASSION MOVEMENT

The UofL Trager Institute's compassion initiative allows Metro Louisville and the Mayor of Louisville to integrate compassion measures in all aspects of local government. The "Compassionate City Index" allows measures of internal and external compassion to be used as a guide in providing services to citizens of our city with the ability to understand the impact on older adults.

OPTIMAL AGING CONFERENCE

The Optimal Aging Conference is an annual national conference bringing academics, researchers, and community worker together to promote initiatives that will foster optimal aging for our growing older adult population. This annual conference continues to grow, helping provide cutting-edge research and service delivery models to our older adult provider network.

THE MEDICAL ORDERS FOR SCOPE OF TREATMENT (MOST) COALITION

The Kentucky MOST Coalition promotes the acceptance, implementation, and evaluation of the MOST form as a vital component of advance care planning for all Kentuckians. The MOST Coalition helps educate patients about their rights regarding the MOST form and how it can help them ensure the care they desire.

COMMUNITY SYMPOSIUM: RECONCILING PAIN AND GIVING HOPE TO SENIORS

In 2019 the UofL Trager Institute held a day-long symposium about opioid use and alternative pain and complementary medicine. Older adults struggle with issues of medication management related to opioid prescriptions and interactions with other medications. Medication safety is a problem, with family members or caregivers taking opioids from older adult patients.

THE FLOURISH VILLAGE

The UofL Trager Institute has been asked to by Citizens of Louisville Organized and United Together (CLOUT) to spearhead an initiative to help older adults stay in their own homes by coordinating access to affordable services, including transportation, health and wellness programs, home repairs, social and educational activities.

CLINICAL RETREAT FOR INTERPROFESSIONAL TRAINING (CRIT) IN GERIATRICS AND PALLIATIVE CARE

In the last year the UofL Trager Institute delivered the CRIT program to increase the knowledge and leadership skills of professionals serving older adults. CRIT reinforces the importance of interdisciplinary collaboration in caring for older adults.

WORKFORCE DEVELOPMENT TRAINING & EDUCATION

GERIATRIC WORKFORCE ENHANCEMENT PROGRAM

Health Resources & Services Administration (HRSA)

The Geriatrics Workforce Enhancement Program reaches all 15 Area Development Districts, which covers all 120 counties of KY, of which 92 are rural or mostly rural. FlourishCare™ addresses the following needs of vulnerable older adults in KY:

- Current health care system that is failing vulnerable older adults
- Lack of a robust rural primary care system in KY
- Lack of quality nursing home care in KY
- Need to create age-friendly area development district in rural areas
- Need to coordinate coalitions and community stakeholders to maximize the potential of population health initiatives within deprived rural environments
- Need to train a health care workforce that can deliver culturally appropriate services to the growing Hispanic populations in KY
- Lack of knowledge of health professionals about the need for alternative pain management strategies to address the risk of opioid misuse; and
- Need for dementia friendly communities and compassionate care for people with Alzheimer's Disease and related dementia.

BEHAVIORAL HEALTH WORKFORCE ENHANCEMENT TRAINING PROGRAM

Health Resources & Services Administration (HRSA)

The Behavioral Health Workforce Enhancement Training Program in Bullitt, Henry, Oldham, Shelby, Spencer and Trimble Counties of KY address the following needs:

- Correlation between the prevalence of chronic medical conditions and poor behavioral health
- Lack of a behavioral health workforce and appropriate treatment support for rural vulnerable older adults who are struggling with behavior health disorders
- Struggle to integrate behavior health into rural primary care practices
- Lack of supportive environments to promote physical health and behavioral health, specifically for rural vulnerable older adults
- Provide appropriate physical health and behavior health services to the growing Hispanic population.

GERIATRIC ACADEMIC CAREER AWARD

Health Resources & Services Administration (HRSA)

Samantha Cotton, PhD, received the first-ever social work focused Geriatrics Academic Career Award in 2019. The purpose of the GACA Program is to support the career development of junior faculty in geriatrics at accredited schools of allopathic medicine, osteopathic medicine, nursing, social work, psychology, dentistry, pharmacy, or allied health. The GACA award will help fund Dr. Cotton's Integrated Practice Education Project (IPEP). The goals of the project are to:

- Enhance personal skill development in interprofessional education and problem-based curriculum design and as an academic geriatric specialist;
- Develop and disseminate the Integrated Practice Education Project (IPEP) with the goal of transforming University of Louisville Physicians (ULP) into an age friendly healthcare system for vulnerable rural older adults 65+ and their caregivers; and
- Fully participate in a mentoring experience with the goal of becoming an academic geriatric specialist demonstrating leadership skills on a national level. Dr. Faul, a seasoned gerontological social worker will serve as Dr. Cotton's mentor with support from two geriatricians as co-mentors, Drs. Furman and Morton.

LISTING OF RESEARCH INITIATIVES

We have been very active with all our research activities in 2020. Due to COVID we were restricted on what we can do but used the opportunity to develop quality virtual programs to meet the requirements of our funded grants. We currently receive funds for the research activities in the below table.

PROJECTS	LEARNER OUTCOMES	PATIENT OUTCOMES	CAREGIVER OUTCOMES
Geriatric Workforce Education Program (GWEP) focusing on geriatric knowledge embedded within primary care practices	√	√	√
Geriatric Workforce Education Program CARES Act funding to support telehealth services	√	√	
Behavioral Health Workforce Education and Training Program focusing on integrating behavioral health with primary care	√	√	
Geriatric Academic Career Award focusing on developing faculty into geriatric leaders	√	√	
ECHO National Nursing Home COVID-19 Action Network	√		
National Family Caregiver Program			√
Health Promotion and Disease Prevention		√	
Hearing impairment study		√	