



Annual Report

December 2019

University of Louisville Trager Institute
Republic Bank Foundation Optimal Aging Clinic

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 **TRAGER
INSTITUTE**

Republic Bank Foundation
Optimal Aging  **Clinic**

“As both a family and an organization, our roots with the University of Louisville run deep. So, at the beginning of this new chapter for the university, with much optimism for the city, the university and President Bendapudi, we felt that it was important to show our support.”

—Steve Trager, announcing the Trager Family and Republic Bank Foundation naming gifts

LETTER FROM THE LEADERSHIP TEAM

This year was monumental in the life of the University of Louisville (UofL) Trager Institute. In 2019, we launched the full-scale operational Republic Bank Foundation Clinic, while growing our partnerships, research, trainings, community outreach, and other programs.

We are deeply grateful for the extraordinary generosity of the Trager Family and Republic Bank Foundations, helping make this incredible transformation possible. You, the Trager Family, saw a promise in our vision, in our understanding of what health and life-long wellness could be. Your shared vision and support for a new future of healthcare has enabled this grand dream of ours to become a reality.

CLINIC LAUNCH

Beginning with our renovation launch in February, the spring and summer months were dedicated to the buildout of our new facility. In six months, our team has created the Republic Bank Foundation Clinic, a truly state-of-the-art clinical facility in Louisville’s Innovation Corridor.

Throughout the creation of the physical space for the Clinic, we have been busy learning the procedural and personal aspects of the Clinic. Our team has nearly tripled and has already exceeded expectations for the number of patients and clients served. We have helped more people of more age groups and more racial/geographic populations than even our most ambitious plans had projected.

Since our doors opened in September 2019, we have seen 1,624 unique patients across nearly 2,900 visits. Of those patients:

- 40% represented an underserved group
- 49% were from a disadvantaged Louisville neighborhood
- 20% were from rural counties in Kentucky and Indiana
- 48% received specialized geriatric care
- 52% received quality, whole health and preventative care

PROGRAMS & RESEARCH

In tandem with patient care, our community outreach, workforce development, and research efforts have grown and matured this year. We have launched multiple new caregiver support groups, hosted our annual Optimal Aging Conference, expanded the reach of our community coalitions, and managed multiple important research projects. We are proud to announce that one of our junior faculty, Dr. Samantha Cotton, received the first-ever Geriatric Academic Career Award from the Health Resources and Services Administration (HRSA).

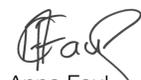
GROWING PHILANTHROPY

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 \$1.35 million new philanthropic gifts and commitments 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

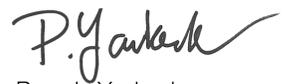

Pamela Yankeelov, PhD
Director of Research

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PHILANTHROPIC & FEDERAL SUPPORT AS OF NOVEMBER 2019

PHILANTHROPIC GIFTS AND COMMITMENTS

(January-November 2019)

Trager Family Foundation	\$2,500,000
Republic Bank Foundation	\$2,500,000
Additional Major Gifts and Commitments	\$1,345,000
Jack C. Wright, M.D. Endowed Professorship on Aging	
Hosparus Health	
Drs. Patricia G. and Laurence N. Benz	
"Raise Some L" 2019/Annual Fund <i>UofL Trager Institute ranked #4 campus-wide based on donor participation</i>	\$2,679
Federal Funding	
Health Resources & Services Administration (HERSA)	\$9,370,000
Additional Philanthropic Support Prior to Naming	\$6,452,500
Smock Endowment for Geriatric Medicine	
Gheens Foundation Visiting Scholar Endowment Fund	
Endowed Geriatric Fund (anonymous estate commitment)	
TOTAL PHILANTHROPIC GIFTS & FEDERAL FUNDING	\$22,170,179

PLANNED SOLICITATIONS FOR CALENDAR YEAR 2020

- **Individual Major Gift Solicitations** – For the support of Trager Institute people and programs
 - \$2.5 million to endow Elder Law faculty position
- **Louisville Bar Association and Kentucky Bar Association**
 - Requests for the general support of the Elder Law Clinic at the Trager Institute
- **Appliance Companies--First Build/GE (Heier), Winston Industries, Midea**
 - Requests to support UofL Trager Institute Community Training Kitchen
- **Humana Foundation**
 - Request to support cross-campus nutrition outreach program for the University and Greater Louisville Community to be coordinated through the new Trager Institute Community Training Kitchen
- **John A. Harford Foundation**
 - Request to support collaborative health initiative with the Louisville Healthcare CEO Council.

PHILANTHROPIC FUNDING PRIORITIES

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.

The Elder Law Clinic is scheduled to open in August 2020. Should the Trager Institute receive limited or no funding for the Elder Law Clinic before August, we will move forward with alternative low-cost/no-cost options, such as Xternships, until the appropriate level of funding is secured.

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.

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.

The Trager Institute is in conversation with First Build to explore a potential partnership involving Speed School of Engineering students in the development of appliances for older adults and others with special needs. Appliances will be equipped with new and emerging technologies that help those with low vision, dementia, and other conditions that put individuals at risk of injury from heated appliances.

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

The UofL Trager Institute intends to apply for Claude D. Pepper Older Americans Independence Center status— an important designation for elite-caliber programs for the advancement of optimal aging.

CONSTRUCTION AND BUILD-OUT

On September 3, 2019 the University of Louisville Trager Institute and the Republic Bank Foundation Optimal Aging Clinic formally launched its new operations at 204 East Market Street in the former Dulworth Office Building. In designing the space, we utilized the “Lean” principles of architectural healthcare design that add value by eliminating waste from existing processes, improve workflow, maximize efficiency, enhance staff and patient experience and improve the bottom line. These principles allowed us to create an innovative open first-floor space of 8,684 square feet, where all visitors are greeted by friendly staff and escorted into a lounge filled with plants, showing a warm and accommodating area for visitors to observe the workings of the UofL Trager Institute and the Republic Bank Foundation Optimal Aging Clinic.

The Republic Bank Foundation Optimal Aging Clinic consists of 11 medical and behavioral health 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, a central work area for research and community projects, a student and community training area, as well as a wellness area that can accommodate up to 80 learners and participants. The upper level also houses a future culinary training kitchen and a physical therapy area.

When the clinic operational planning meetings began with the University of Louisville Physicians in April 2019, the Trager team learned that the Republic Bank Foundation Optimal Aging Clinic would outgrow the clinic space within the first year and a plan for expansion would be needed. This led us to explore additional funding for the buildout of the lower level. The lower level, once completed, will be used for our training and wellness area and for our Elder Law Clinic, allowing additional medical and behavioral health offices to be opened on the upper level.

We are pleased that the first phase of our buildout is nearly complete and both the UofL Trager Institute and Republic Bank Foundation Optimal Aging Clinic are fully operational. We look forward to completing the second and final phase of our buildout in 2020 and offering a truly comprehensive “one-stop” shop in Louisville for patients to receive medical and wellness care, attend fitness and yoga classes, receive nutritional support, legal advice, and much more.



Renovation Launch 2019



New facility, Fall 2019

REBRANDING OF THE INSTITUTE AND CLINIC

We have transitioned our brand to consistently reflect our new “Trager Institute” and “Republic Bank Foundation Optimal Aging Clinic” identity across all our platforms and channels.

STAPLE ITEM BRANDING

1. New logos for Institute & Clinic
2. Website & URL updated with name and logos
3. New logos & name in email newsletter template
4. Employee signatures updated
5. Brand Stationery updates
 - a. Letterhead & Envelopes
 - b. Business & Appointment cards
6. Give Away Items

BUILDING SIGNAGE

We have installed key signage on the building. We will continue working on building more permanent signage internally and externally as we move into year 2.

7. Signage from entrances

SOCIAL MEDIA PLATFORMS

8. Social Media Platforms updated with new logos and language:
 - a. Facebook
 - b. Twitter
 - c. LinkedIn
 - d. Google Places
 - e. Instagram

FUNDRAISING MATERIALS

9. Donation Pledge Card (Gold Standard Luncheon)
10. RaiseSomeL – Webpage, Emails & Social Media

PROMOTIONAL MATERIAL

All promotional content for programs and events reflects new brand identity (selected examples below):

11. Republic Bank Foundation Optimal Aging Clinic Post Card
12. Optimal Aging Month Flyers & Emails
13. Optimal Aging Conference
14. Caregiver Programs & Services
15. Flyer for Louisville Healthcare CEO Council

PRESS RELEASES & OTHER MEDIA

16. Today's Transitions Full Page Ad
17. Press Releases (11 releases since Feb. 2019)
18. MD Update Article
19. Business First Articles

RADIO APPEARANCES

20. UofL Radio (1X), KIPDA Radio (4X), Aging in Kentuckiana (1X), Forward Radio (1X)

selected visuals provided

UOFL TRAGER INSTITUTE ANNUAL REPORT



DECEMBER 2019

2019 FINANCIAL SUMMARY

EXPENSE DESCRIPTION	REPUBLIC BANK FOUNDATION OPTIMAL AGING CLINIC	TRAGER FAMILY FOUNDATION	TOTAL EXPENSE
Architect and Project Management	\$34,409	\$34,408	\$68,817
Construction and Renovation	\$443,726	\$443,278	\$887,004
Furniture & Moving Expenses	\$19,449	\$19,459	\$38,908
IT/Technology	\$1,183	\$1,183	\$2,366
Marketing/Signage	\$1,233	\$1,672	\$2,905
Total Expense	\$500,000	\$500,000	\$1,000,000

Architect and Project Management: Architect Mike Materna from the University of Louisville's Plan, Design and Construction Department led the design and oversight of the construction project beginning January 2019 through final completion of phase I. Direction and management of project was provided by faculty of the UofL Trager Institute.

Construction and Renovation: Xtreme Construction oversees the construction and renovation work, starting January 2019. There were also cabinetry and flooring costs associated with the buildout that was paid to different vendors.

Furniture & Moving Expenses: We were able to use much of our existing furniture in the new space and secure used furniture from the University of Louisville Physicians storage facility. However, we still need furniture for our therapy rooms, executive offices, and training area. Office and Industrial Specialists, Inc. moved all furniture and electronics from our previous location and ULP storage area into our new facility.

IT/Technology: Video conferencing displays and sound system were purchased for conference areas and executive office and used in conjunction with existing equipment taken from the former location.

Marketing/signage: FastSigns provided temporary directional signs and more permanent signs within the building. They also placed new logos of the Institute and Clinic on the glass doors. Marketing expenses were related to the groundbreaking ceremony.

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

PATIENT AND APPOINTMENT TOTALS

Patients served	1,624	
# of Appointments	2,896	
# of Future Appointments booked	1,522	

DEMOGRAPHICS OF PATIENTS SERVED

GENDER		
Female	1,139	70%
Male	485	30%

RACE AND ETHNICITY		
Non-Hispanic Black	527	32%
Non-Hispanic White	1,002	62%
Other	95	6%

AGE		
Age 18-49	409	25%
Age 50-64	434	27%
Age 65+	781	48%

PATIENT GEOGRAPHIC LOCATION		
West Louisville	381	24%
South Louisville	395	25%
East Louisville	526	32%
Rural Kentucky Counties	184	11%
Indiana	138	9%

PROVIDERS

NAME	SPECIALTY
PROVIDERS IN CLINIC	
Christian Furman, MD	Geriatrician
Josephine Gomes, MD	Geriatrician
Peter Esch, MD	Geriatrician
Elizabeth Volpert, DNP	APRN
Angela Leinenbach, DNP	APRN
Christopher Shafer, MD	Neurologist
Joseph D'Ambrosio, PhD	Licensed Marriage and Family Therapist
Anna Walton, MSSW	Licensed Clinical Social Worker
Jule Ann Morgan-Siebe, MSSW	Licensed Clinical Social Worker
Christopher Hannon, DNP	RN

FELLOWS IN CLINIC	
Janaki Samaraweera, MD	Geriatric Fellow
Patricia Guzman, MD	Geriatric Fellow

FLOURISH CARE SPECIALISTS

Mariah Likens, MSSW	Clinical Social Worker
Kennette Rightnour, MSSW	Clinical Social Worker
Alison Hanlein, MSSW	Clinical Social Worker
Dena Wilson, MSSW	Clinical Social Worker
Leigh Ann Bowman, MSSW	Clinical Social Worker

Plans are to add an additional MD to provide services to both the Republic Bank Foundation Clinic and Presbyterian Homes of Kentucky, our new satellite campus. We are contracting with an audiologist, an acupuncturist and a massage therapist to provide services at the Republic Bank Foundation Clinic in 2020 when the lower level build-out is complete.

UOFL TRAGER INSTITUTE COLLABORATIONS

In total, the UofL Trager Institute reached 6,888 individuals in 2019 through our 854 trainings and presentations delivered to students, faculty and community members. Our presentations reached 5,101 people in 2019, of which 4,799 were community members and professionals, and the rest were student learners. We participated in seven radio shows about our work and reached an additional 122,200 people with these shows. Our YouTube video on the risks of opioids was seen by 595 people online. We delivered 105 presentations, of which 79 were local or at the state level, 24 were national and 1 was international. We hosted three conferences (Optimal Aging Conference, Opioid Use and Alternative Pain and Complementary Medicine, and Clinical Retreat for Interdisciplinary Teams). Our top presentation topics for the year were: Alzheimer's disease, Advance Care Directives/MOST, Health-Focused Groups and Workshops, FlourishCare™, and Pain Management.

INTERNAL COLLABORATIONS

The focus of our collaborations with the different Schools at the University of Louisville is to train the future healthcare workforce on how to deliver whole health care to patients as part of an interdisciplinary team of care.

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.

In setting up the Republic Bank Foundation Optimal Aging Clinic, we met with the University of Louisville Physicians leadership team and made the strategic decision to place the Clinic 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 three 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.

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.

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.

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 will be used for a study, determining the type of screening experience that triggers take-up of a decision coaching guide following a failed hearing screen.

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.

As part of our work on these grants, we have developed the Interprofessional Curriculum for the Care of Older Adults (ICCOA) 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.

We also developed the Interdisciplinary Case Management Experience (ICME) to support the development of interdisciplinary care planning using standardized patient videos and role-plays. Finally, we developed the Clinical Retreat for Interprofessional Training (CRIT), 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.

During 2019, the following number of medical faculty, residents, fellows and students participated in the various grant activities:

TYPE	#
ICCOA	36
ICME	167
CRIT	14
Total	217

SCHOOL OF NURSING

The Trager Institute is collaborating with the UofL School of Nursing to house their faculty clinical practice at the Republic Bank Foundation Optimal Aging Clinic. Two Advanced Practice Nurse Practitioner faculty work in the Republic Bank Foundation Optimal Aging Clinic. Dr. Elisabeth Volpert has a full panel of patients that she sees at the Republic Bank Foundation Optimal Aging Clinic. Dr. Angela Leinenbach will see patients at the Republic Bank Foundation Optimal Aging Clinic at Presbyterian Homes. Three nursing faculty are credentialed to provide additional support to Drs. Volpert and Leinenbach. Dr. Volpert chose to move her practice to the Republic Bank Foundation Optimal Aging Clinic to provide whole health care to her patients from a full interdisciplinary team of providers. This type of practice did not exist within the University of Louisville Physicians group before the creation of the Republic Bank Foundation Optimal Aging Clinic. Dr. Whitney Nash, the Assistant Vice President of Interprofessional Practice Partnerships (HSC), and Associate Dean of Practice and Service at the School of Nursing, forms part of our clinic leadership team and provides supervision to both of the APRN faculty members.

Students and faculty from the School of Nursing are active participants in our two workforce development grants. During 2019, 8 Doctoral in Nursing Practice (DNP)-Psychiatric students worked at the Institute or in the Clinic, receiving stipends. In 2019, the following number of nursing faculty and students participated in the various grant activities:

TYPE	#
ICCOA	198
ICME	198
CRIT	3
Total	399

KENT SCHOOL OF SOCIAL WORK

The UofL Trager Institute has an ongoing collaboration with the Kent School of Social Work. Social work students complete their 20 clinical hours a week at the Republic Bank Foundation Optimal Aging Clinic, providing support for annual wellness visits and care coordination. They also participate in all the activities of the two workforce development grants. During 2019, 53 social work students worked at the Institute or in the Clinic, and received stipends. The School provides administrative support in managing the two grants.

During 2019, the following number of social work faculty and students participated in the various grant activities:

TYPE	#
ICCOA	53
ICME	53
CRIT	2
Total	108

COLLEGE OF EDUCATION AND HUMAN DEVELOPMENT

The UofL Trager Institute has a strong collaboration with the *Department of Educational and Counseling Psychology Program* in the College of Education and Human Development, specifically focused around the two workforce development grants. During 2019, 8 master's in counseling psychology (M.Ed.) students worked at the Institute or in the Clinic, and received stipends. The following number of counseling psychology learners participated in the various grant activities:

TYPE	#
ICCOA	8
ICME	8
Total	16

SCHOOL OF DENTISTRY

The Trager Institute collaborates with the School of Dentistry by providing two 3-hour workshops to their undergraduate Dental Hygiene and graduate Dental students on basic motivational interviewing skills. The purpose of these workshops is to train learners in how to communicate with patients who are not taking care of their teeth by smoking or engaging in other types of unhealthy behaviors that affect the health of their teeth. Also, their students participate in the workforce development grants by participating in all grant activities. The following number of dentistry learners participated in the various grant activities in 2019:

TYPE	#
Motivational Interviewing workshops	245
ICCOA	197
ICME	197
Total	639

BRANDEIS SCHOOL OF LAW

The UofL Trager Institute is collaborating with the Brandeis School of Law to establish the Elder Law Clinic on the lower level as part of the Republic Bank Foundation Optimal Aging Clinic. This 295 square foot space will allow law students to provide elder law services as part of whole health care. The goal of the Trager Elder Law Clinic is to teach law students the practical skills to successfully practice law, with a focus on legal issues affecting older adults. The students will represent low-income clients who are referred to the clinic from our list of patients and community sources, including elder non-profits, hospitals, social workers, the Area Agency on Aging, local courts, and previous clients. Students, working in teams, will take primary responsibility for representing clients, under the supervision of clinic faculty. Students will also be a part of an interdisciplinary team that provides holistic care to those older adults that need more than legal services. 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, and settlement of estates with limited assets/small estates.

Law students will interview clients, conduct the necessary factual investigation and legal research for their cases, draft legal documents and pleadings, prepare clients for hearings, and represent them at hearings. Students will also make community presentations on elder-law issues. Students' court appearances at guardianship hearings will be under the supervision of the clinic's supervising attorney. Students will work with a partner, where possible, and have a caseload of between six to eight cases at a time, all in various stages of development. Students will spend sufficient time to meet their service/class requirements in client representation.

Elder Law Clinic students and their supervising attorney will meet together for an average of five hours per week. Students will participate in weekly interdisciplinary training at the Institute that provides a background in transdisciplinary care of older adults. Additional office hour/case rounds meetings will be held each week to discuss students' client work on cases they are preparing or completed, and they will consult with one another on case challenges.

SPEED SCHOOL OF ENGINEERING

Our partnership with the Speed School of Engineering involves the final year capstone projects of students in the *Department of Electrical and Computer Engineering*. The capstone projects focus on the development of new monitoring tools and technologies that will improve the ability of older adults and caregivers to monitor health, communicate with healthcare providers, and manage chronic conditions effectively and safely within their homes. The goal of the Engineering Capstone at the Institute is to identify and address emerging areas of innovation from the perspective of the aging care industry. The resulting concepts are evaluated by older adults to ensure projects are age-friendly. Projects are then tested after development by the same group of older adults. Two major projects have been part of capstone projects for the last 3 years:

Reminder Rosie - This electrical engineering capstone project addressed the challenge that families face in balancing independence and safety of persons with dementia. Students sought to create an addition to the existing Reminder Rosie product, an alarm clock system designed to assist those living with dementia, by providing pre-recorded reminders of events and tasks at times set by a caregiver. This product has accompanying mobile and desktop apps for caregivers. Currently, the Rosie Reminder only offers audio reminders. For their capstone project, students aimed to design a visual aid display to accompany audio reminders to increase the effectiveness of the reminder system.

Toilet Seat Weight Scale - The goal of this electrical engineering capstone project is to create a way to monitor the weight of elderly individuals with health concerns, while remaining at home rather than in an assisted living facility. Most patients go to the restroom first thing in the morning, so this system is designed to monitor that patient's weight at a consistent time every day. Should a drastic fluctuation take place, the caregiver will be notified via a wireless application. The system described was a toilet seat weight scale that takes the patient's weight while tracking previous weights to ensure the health of the patient.

COLLEGE OF BUSINESS

The Institute supports a UofL MBA intern in Marketing & Business Development. Interns assist and support the Marketing & Business Specialist with graphic design, event promotion, and website and data base management. Industry research and strategic development are also done as part of this internship.

SCHOOL OF PUBLIC HEALTH

The Institute appointed a Faculty-in-Residence, Tom Walton, from the School of Public Health as a consultant to develop the procedures for the Republic Bank Foundation Optimal Aging Clinic. Tom has extensive experience with healthcare systems. He has led the development of the Clinic business plan, and set up all the Clinic systems in collaboration with the University of Louisville Physicians and the Trager Institute leadership teams.

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.

HISPANIC FAMILY COMMUNITY CLINIC

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.

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 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.

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.

During 2019, the following number of Sullivan University pharmacy faculty, residents, fellows and students participated in the various grant activities:

TYPE	#
ICCOA	95
ICME	95
CRIT	1
Total	191

UNIVERSITY OF PIKEVILLE MEDICAL SCHOOL

Through this partnership, 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

\$7,150,000 | 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

\$1,920,000 | 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

\$300,000 | 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.

RESEARCH PROJECTS

ONGOING RESEARCH PROJECTS

- Learner Outcomes of the Interdisciplinary Curriculum for the Care of Older Adults (ICCOA)
funded by the Health Resources & Service Administration
- Development and Validation of the Flourish Index
funded by the Health Resources & Service Administration
- Flourish Patient Outcomes
funded by the Health Resources & Service Administration
- Does the Screening Experience Influence the Uptake of a Decision Coaching Guide for Adults with Unaddressed Hearing Impairment? An Effectiveness Study
funded by the Retirement Research Foundation
- Evaluating the Impact of Alzheimer's Disease Simulations
- Safety and Feasibility of Aquilo Cryo-Compression Pants for Older Adults
- Evaluating the Impact of Microclinics and Self-Care on Workforce in Training
- MOST Awareness
- John C. Wright, MD Optimal Aging Study
- Impact of Compassionate Care Curriculum on CNAs Knowledge & Skills and on the Stress and Agitation Levels of Persons living with Alzheimer's
- Incorporating New Generations of Veterans and Service (VIKINGS) Program
- Older Adults Hospitalized for Pneumonia in the United States: Incidence, Epidemiology, and Outcomes
- Evidence-Based Practice Projects

PROPOSED RESEARCH PROJECTS

American Massage Therapy Association - Investigate the efficacy of the massage therapy for the management of nonradicular pain in the spine of older adults as a potential alternative to current standard of care (control group) over an 8-week, once a week evaluation period.

Robot Study - In collaboration with the School of Engineering, we have assisted in the initial planning phase of a developing PAR-186 proposal for a robotic in the home to assist caregivers for older adults with Alzheimer's Disease and related dementias.