



2023 Year in Review



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Looking back on 2023, Trellis has much to celebrate and many people to thank. Our staff, volunteers and partners demonstrated creativity and dedication as we worked together to help people thrive as they age. This report outlines the ways in which we advanced our mission throughout 2023, grounded in our commitments to equity, innovation, and collaboration.

2023 marked the final year of Trellis' 2020-2023 strategic plan, which included the ambitious goal to improve the lives of one million people. We are proud to share that we have supported more than 1.5 million people since 2020. We are eager to build on this momentum in 2024 and the years to come. We hope you'll join us.



PROGRAM ACCOMPLISHMENTS

Older Americans Act Administration

In our role as the area agency on aging in the seven-county Twin Cities metro area, Trellis' Older Americans Act team works with direct service provider organizations to fund services that meet local needs and preferences. In 2023, the team:

- Published the first request for proposal for all Title III funds simultaneously.
- Implemented a new grants management system, SmartSimple.
- Supported the implementation of a legal risk detector tool through Southern Minnesota Regional Legal Services.
- Hosted leadership from the federal Health and Human Services office to share how Older Americans Act providers improve service access for older adults with language or culture barriers.
- Added an online search tool for Older Americans Act services by city.



By the Numbers

\$13.2 million

awarded, including increased funding to the MN Senior Nutrition Program

41

organizations funded

Senior LinkAge Line Services



Trellis supports individuals through the Senior LinkAge Line, a free, statewide service of the Minnesota Board on Aging in partnership with Minnesota's

area agencies on aging. The Senior LinkAge Line is a key resource for older adults who want to optimize well-being as they age.

Benefits and Options Team

Benefits and Options Team members provide information and assistance to Senior LinkAge Line callers. They are on the front lines of helping older adults and caregivers find resources and answers to their questions related to Medicare, housing, transportation, financial services and other community supports.



By the Numbers



32,525

call answered



5,816

calls answered during Medicare open enrollment



Impact Story:

"Bill" contacted the Senior LinkAge Line after the social worker at his dialysis clinic encouraged him to do so. Bill had been on Medical Assistance, but was about to become ineligible due to the ending of the Public Health Emergency (PHE) unwinding. He relied on Medical Assistance (MA) benefits to help with his weekly dialysis, physical therapy, and rides to medical appointments.

The Senior LinkAge Line specialist was able to review all of Bill's various options for health insurance coverage, helping him select a plan that covered his routine providers as well as medications. The specialist also connected Bill to transportation options in his community, as well as housekeeping help and home delivered meals. Bill was very appreciative of the support the specialist provided.



Preadmission Screening

The preadmission screening (PAS) team receives and processes screens for all individuals entering a skilled nursing facility. This helps to ensure it is the most appropriate placement based on federal law.

In 2023, Trellis' PAS team handled 54% of all statewide screenings with approximately 38% of the state's total PAS staff capacity. The team provided support to the Minnesota River Area Agency on Aging and the Central Minnesota Council on Aging as they prepared to triage all preadmission screenings for the state beginning in November of 2023.



By the Numbers

31,268

screenings, representing 54% of all
screenings statewide

Partner Comments:

- Hospital social workers often tell PAS specialists, "you rock!" or "thanks for all you do!"
- Nursing facility and hospital staff frequently share comments about Trellis PAS team members always being friendly and helpful.

Return to Community

The Return to Community team helps older adults remain in their homes or return to their home from a facility by providing free in-depth support and follow-up. Support is also provided to family members and caregivers.

In 2023 the team increased in-person visits eight times over the previous year, a trend they hope will continue into 2024 as more people become comfortable meeting in person following the height of the COVID-19 pandemic.



By the Numbers



5,780

RTC client referrals



633

received full services



1,131

check-in calls



1,536

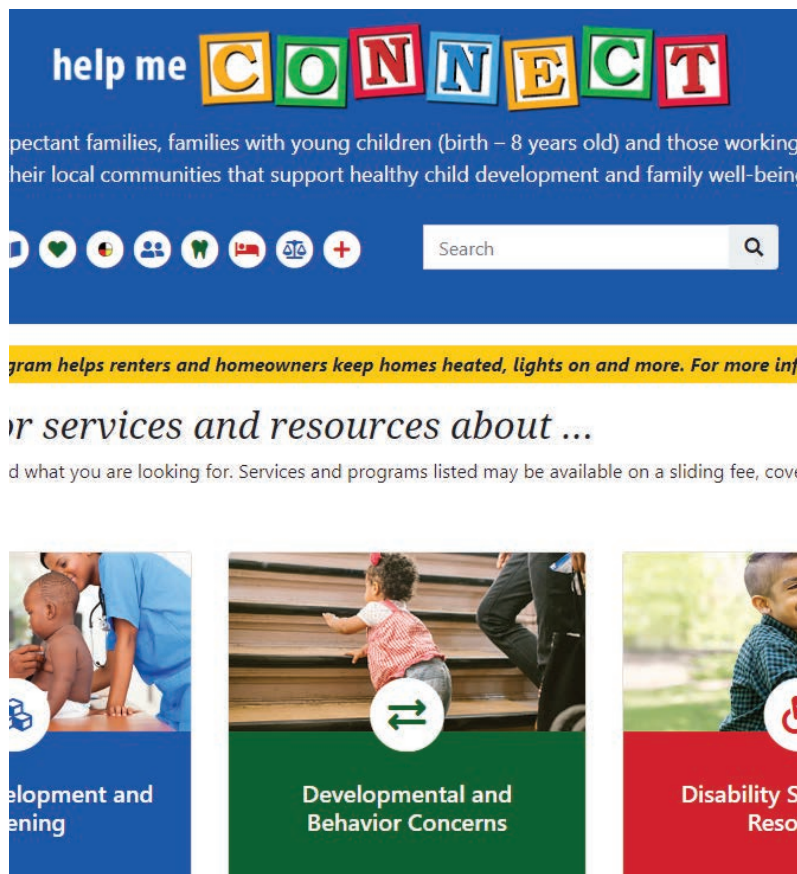
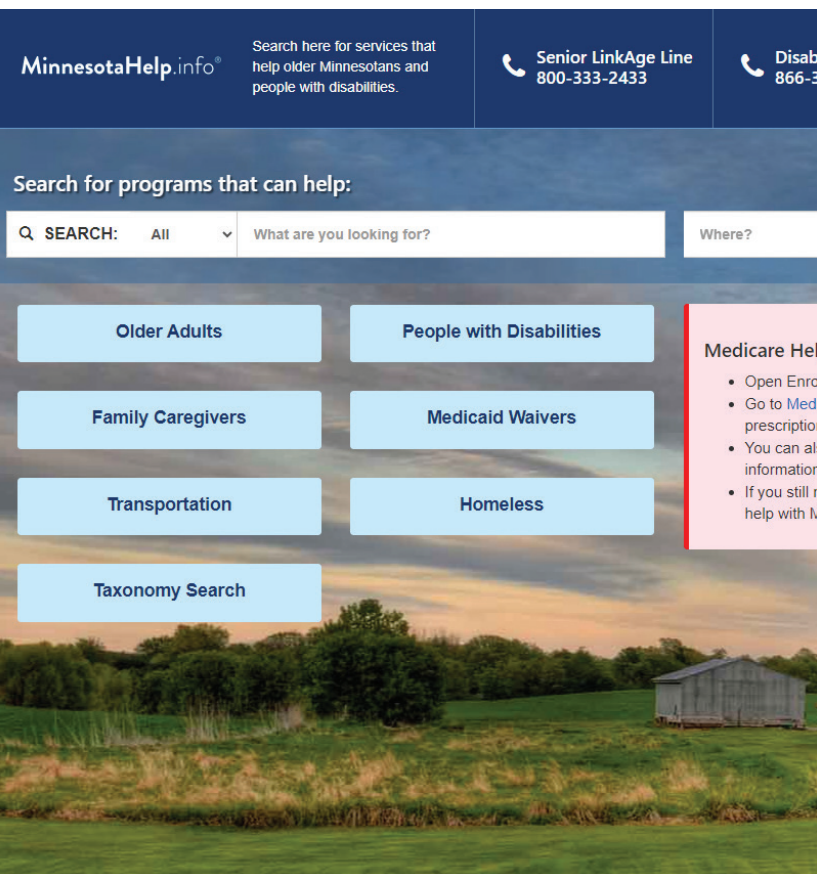
in-person visits



Notes from participants:

- "Thank you very much for your time with my mother and me yesterday. I really appreciate that there is a resource like this available to us."
- "Thanks so much for all of your help. I can see why you have the job that you do. You are great at it."
- "I appreciate the resources, patience and knowledge you provided to help me navigate the transitional care unit system."

Data Management Program



The Data Management Program manages the information that populates the MinnesotaHelp.info and Help Me Connect websites. The database includes listings for social services across Minnesota.

Throughout 2023, Data Management Program staff made changes to the database to make it easier for people to find free and low-cost services in their area. In response to an increasing number of people calling the Senior LinkAge Line asking about adult day services, the Data Management team added more than 400 features to this service category.



By the Numbers

12,314

total agencies listed in the database

70,604

points of service listed in the database

Top 3

search terms in 2023: assisted living facility, transportation and personal care assistance



Juniper, a program of Trellis, is a statewide social care network in Minnesota. Juniper bridges the gap between medical and social care through partnerships with community organizations, healthcare providers, public health organizations, and health insurers. As one of 58 community care hubs in the United States, the Juniper network assists Minnesotans by addressing chronic health conditions, preventing falls, and enhancing overall well-being. Highlights from 2023 include:

- Being recognized as a community care hub by the Administration for Community Living and the Centers for Disease Control and Prevention.
- Published research that shows the health and economic benefits of evidence-based falls prevention programs.
- Established the Diabetes Prevention Program as a reimbursable service from the Centers for Medicare and Medicaid Services and Minnesota Health Care Programs. The program is also available as a free benefit to all Blue Cross/Blue Shield members.



By the Numbers



5,393
participants



375
classes



Impact Story:

Chris, a participant in Juniper's Tai Ji Quan class, says the program has helped strengthen her body and her mind: "I no longer see myself as a falls risk, and I'm losing weight from the exercises."

When she started Tai Ji Quan, Chris had just moved to a new area and felt isolated. The support of other participants in the program helped Chris establish connections in her community. "I have friends now, and we're going out to dinner and to the farmer's market. We're also going to presentations that are teaching me more about the town I live in. It's more socializing than I've done in 20 years."



Volunteer and Outreach

The Volunteer and Outreach team delivers education and information about the Senior LinkAge Line throughout the seven-county metropolitan area in partnership with community organizations. Volunteers provide Medicare counseling, give community presentations, serve as ambassadors to their home communities and are embedded in nearly all departments within Trellis.

During Open Enrollment, the Outreach Team gave nearly 100 presentations, educating and assisting Medicare beneficiaries take control of their Medicare decisions. Twenty-four percent of presentations during open enrollment were led by volunteers. Eight out of ten presentations were targeted to underserved communities, helping us to achieve our equity goal.



By the Numbers



23

new volunteers;
30% speak more than one language



4,935

volunteer hours



184

presentations

Impact Story:

Members of the outreach team met a 60+ year old woman at a senior resource fair in Minneapolis. When asked if she had ever heard of the Senior LinkAge Line, tears filled the woman's eyes. She explained that she had been struggling with stable housing and in 2020 she was going through a particularly difficult time. She called the Senior LinkAge many times over several months, each time with a new challenge. With help from the Senior LinkAge Line and others, she was able to apply for an Elderly Waiver, secure housing and resolve issues with her medications. "Your team at Trellis is a life saver—thank you!"

Dementia Friendly Initiatives

Trellis leads three dementia friendly community initiatives across Minnesota: ACT on Alzheimer's, Dementia Friends Minnesota and The Remember Project. These initiatives strive to make communities good places for people with memory loss to live and thrive.

Together in 2023, we reached a new record with 26,179 Dementia Friends in Minnesota. The refreshed Dementia Friends website has been operational for a full year now, and our Champions have taken on the learning curve to track their activities and impact.

Trellis received a UnitedHealthcare Empowering Health grant to address social isolation for people experiencing dementia and their caregivers. We began developing partnerships to advance this work in 2024 and beyond.

We hosted monthly Communities of Learning on a number of topics, including home-based memory care for veterans, improving air travel for people living with dementia, and new community-based work from the Memory Keepers Medical Discovery Team.



By the Numbers



2,250

new Dementia Friends



18

Dementia Champion trainings



19

Remember Project events



1,059

Remember Project attendees



A scene from *The Remember Project* production, "Fortune Cookies."

Thanks to support from the Minnesota Department of Health's Building our Largest Dementia Infrastructure (BOLD) initiative, The Remember Project began new partnerships to increase early detection of dementia in the Twin Cities metro. Our work with AshaUSA, Centro Tyrone Guzman, and SEWA-AIFW has helped us understand the needs and priorities of BIPOC program partners.

The Remember Project was invited to work closely with the Wisconsin Office for the Deaf and Hard of Hearing to adapt their "Fortune Cookies" production to make it fully accessible to audience members with hearing impairment or loss.



ElderCare Partnership Development

The ElderCare Partnership Development (EDP) team helps community organizations build capacity and sustainability so they can provide services that meet the needs of older adults in their communities. EDP highlights from 2023:

- Provided technical assistance to 22 organizations interested in Live Well at Home funding. Ten of those organizations were awarded funding for programs, services, and capital goods that totaled \$1.5 million.
- Supported 19 communities to implement their age-friendly community goals.
- Delivered a training to 124 MnDOT employees where they learned more about the impacts of caregiving and how to connect to resources that support caregivers.



By the Numbers

19

Age-friendly communities received technical assistance

53

organizations received technical assistance for more than five funding opportunities

Impact Story:

Phoenix Cove Adult Day Center in Lakeville has worked with Trellis EDPs over the past seven years, seeking resources and partnerships to help support their pan-Asian Adult Day program and the additional supportive services they provide.

During the pandemic, owner Kristina Kwan used her business' resources to provide meals to isolated elders and host numerous vaccination clinics for Asian elders and their caregivers. In 2023, Phoenix Cove was looking for resources to expand their services in response to the closure of other services in the area. Trellis' EDP team encouraged Kristina to apply for a Live Well at Home grant through the Minnesota Department of Human Services. The EDPs supported her through the application process with guidance on how to communicate the important work she does and its impact on the Asian elders they serve.

Phoenix Cove was successful in their application and will be receiving \$113,000 to expand their capacity to provide transportation to older adults to their day center, provide respite to caregivers, and serve more people. Phoenix Cove Adult Day Center will continue to receive the support of EDP staff as they implement their project into 2024 and beyond.



Pension and Retirement Rights

Trellis Pension and Retirement Rights provides legal services to adults to ensure they get the retirement funds they have earned. Staff and volunteer attorneys support retirees and their families in Minnesota, Wisconsin, Iowa, North Dakota, South Dakota and Nebraska.



By the Numbers

55

cases opened

58

cases closed

144

total client matters

\$812,667

total recovered funds



Impact Story:

An 80 year-old widow came to the Pension and Retirement Rights project facing a pension overpayment. She is the surviving spouse of a state pensioner living on a modest fixed income. Despite reporting the death of her husband to the retirement plan in a timely manner, the plan continued to pay the full monthly benefit to her for years. This resulted in an overpayment in excess of \$80,000.

Trellis attorneys were able to negotiate the overpayment amount down to \$35,000, saving the client \$45,000.

Equity

Trellis defines equity as “the process of eliminating disparities and improving outcomes for everyone.” The consequences of inequities are often experienced acutely by older adults and caregivers from communities of color, a byproduct of a lifetime of discriminatory, noninclusive policies and a lack of responsive systems. Highlights from our equity work in 2023:

Intrastate Funding Formula: Trellis organized community organizations and residents to call for greater equity in the Older Americans Act Intrastate Funding Formula, the calculation used by the Minnesota Board on Aging to allocate millions of dollars to older adult and caregiver services throughout the state. Thanks in part to our efforts, the Minnesota Board on Aging increased the percentage of funds directed to minority populations in Minnesota.

Equity Advocate: We established an internal equity advocate role to support staff professional growth, advance equity and encourage problem resolution.

WISE Model: We created the WISE model to apply an equity lens to decision-making at all levels. The WISE tool asks a series of questions designed to help clarify and define problems, challenge assumptions and biases, and solicit a diverse set of opinions.



What and Who

What’s the decision being considered? What are the desired results and outcomes, if known?

Who is included in this decision-making process? Who is excluded? Why?

Who will benefit from this decision? Who will be burdened and/or most adversely impacted?



Information and Inclusion

What data is used to make the decision? Is this data disaggregated to learn if there are disparate impacts?

How do we engage those potentially impacted the most in the decision-making process? What role do they want? What degree of involvement do they want?

Have we given enough time to meaningfully incorporate all voices in the decision?



Seek alternative Solutions and Strategies to the Status Quo

How did things get this way? What are contributing factors or key causes? What are some of the cumulative effects?

What stereotypes, beliefs, or norms justify or perpetuate the problem?

What are alternative strategies and solutions? Are there other ways to maximize benefits and reduce negative impacts for everyone affected?



Evaluate for Equity

What evidence will we collect and analyze to determine the impact of this decision? What are indicators of success and progress?

What is unresolved? What do we still need to make changes?

After the decision is executed, how will we gather and use input from those affected?

New Board Members & Employees in 2023

We welcomed two new board members and 13 employees to our team in 2023.



Adeel Lari
Director,
Researcher

Institute for Urban and
Regional Infrastructure
Finance
Hubert H. Humphrey
School of Public Affairs



**Carla
Zbacnik**
Senior Associate
State Director,
Communications

AARP Minnesota



**Madelyn
Anderson**

Community
Living Specialist



**Andy
Brown**

VP of
Communications
and Engagement



**Bekele
Dako**

Community
Outreach
Specialist



**Stacy
Dunn**

Provider
Relationship
Coordinator



**Mackenzie
Fransen**

Wellness
Engagement
Specialist



**Tyler
Kinney**

Community
Living Support
Specialist



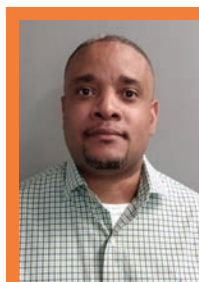
**Maren
Levad**

Dementia Friendly
Initiatives Program
Manager



**Camile
Nash**

Community
Health Worker



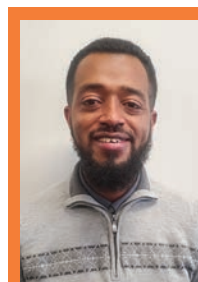
**Kamal
Nash**

Benefits
and Options
Specialist



**Julie
Pedersen**

Benefits
and Options
Specialist



**Abdul
Sero**

Community
Outreach
Specialist



**Bill
Tiedemann**

Eldercare
Development
Partnership
Coordinator



**Sara
Thiphaseng**

Juniper Billing
Specialist



Recognition

The Volunteer and Outreach Team received a national innovation award from USAging in recognition of Trellis' efforts to reach more older adults and caregivers from historically marginalized and underserved communities.

Volunteer and Outreach Manager Jetta Wiedemeier Bower received the Mary Wiser Award for Leadership in the Field of Volunteer Resources from the Minnesota Alliance for Volunteer Advancement.

Trellis earned service enterprise accreditation through ALIVE and the Minnesota Alliance for Volunteer Advancement in recognition of our strategic volunteer engagement.



Values In Practice Award

Each year Trellis staff nominate colleagues for the Values in Practice (VIP) award. The award recognizes staff who exemplify one or more of our shared values: mission focus, integrity, professional growth, leadership and Diversity, Equity and Inclusion. The 2023 VIP award winners are shown here (left to right): Mary Jo Balzart, Senior LinkAge Line administrative assistant, Nicole Pace, human resources generalist, and Jolene Anderson, Older Americans Act grant manager.



Advocacy

Volunteer Driver Coalition: Trellis continues to play a leading role in the Volunteer Driver Coalition, a group of more than 120 public and nonprofit organizations advocating for federal legislation that would increase the federal reimbursement rate for volunteer drivers. The Volunteer Driver Appreciation Act of 2023 currently has 16 congressional co-authors.

Older Americans Act Reauthorization: Trellis gathered input from aging service providers in the Twin Cities metro area to inform our response to proposed changes to Older Americans Act regulations. Trellis submitted comments focused on maintaining and increasing flexibility for service providers so they can have the greatest impact in their communities.



Mark Cullen, Vice President of Strategy and Business Development, Dawn Simonson, President and CEO of Trellis, with ACL Leaders at the USAging Conference.



Trellis staff and community partners with Chief of Staff Sean McCluskie from the US Department of Health and Human Services (HHS) at Centro Tyrone Guzman in Minneapolis.



Michael Cabonargi, Region V Director at the U.S. Department of Health and Human Services, with our partners at the Lao Advancement Organization of America.



Rep. Ilhan Omar visited Trellis this summer and shared a meal with community members at the Korean Service Center in Minneapolis.



We provide services, connections and innovations that meet the changing needs of a growing population of older adults. We help people optimize well-being as they age.



trellisconnects.org

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