

CAMPAIGN UPDATE: Time to celebrate!

to
gether



Age of *Opportunity*

The Campaign
for Hebrew SeniorLife

\$125 million | 7 years

The *Age of Opportunity* campaign was both ambitious and forward-thinking. To achieve our goal of advancing our ability to help seniors live their best lives, we focused on four essential areas:

- Research and Teaching
- Memory Health
- Above and Beyond
- Flagship Campus

As we celebrate raising \$125 million thanks to you and the many donors highlighted in this report, we want to applaud the many accomplishments that are helping to meet the challenges of senior care today. These include meeting the extraordinary challenge of COVID-19, leading the way in geriatric research, and providing outstanding health care. The concerns that seniors face are pressing, including the need for more affordable housing options, more supports for people with dementia, and more geriatric training and research. While we want to celebrate the successes we have achieved in these areas, we also know we will continue to grow and innovate for the benefit of seniors because of the ongoing support from donors like you.



25,000+

Total donors

21%

Increase in donor base

\$6.6 million

Raised for COVID-19 relief and front-line salaries



Research and Teaching

Seniors are living longer, and even as their numbers grow, geriatric research is chronically underfunded, and fewer clinicians are available to care for them. The *Age of Opportunity* campaign has helped us grow our research and teaching capabilities, ensuring a higher standard of care for seniors, now and in the future. We are leaders in research on aging at the Hinda and Arthur Marcus Institute for Aging Research at Hebrew SeniorLife, where we conduct clinical and translational research on specific health challenges facing older adults. The *Age of Opportunity* campaign has also enabled us to expand our teaching role and introduce new workforce development programs that are increasing opportunities for front-line staff and addressing a critical need for health care workers.



CHAMPIONS OF RESEARCH

Hinda and Arthur Marcus

Hinda and Arthur Marcus are passionate about Hebrew SeniorLife's mission to care for seniors and to aging research. Their generosity spans many years, and as early contributors to the *Age of Opportunity* campaign, they led the way with a \$10 million gift to support and name Hebrew SeniorLife's Hinda and Arthur Marcus Institute for Aging Research.

Among the many future-altering results coming out of the Marcus Institute is a Healthy Aging Initiative established to answer the question of what predicts and supports healthy aging. The research will involve a diverse cohort of older adults, including Hebrew SeniorLife residents, in annual non-invasive, state-of-the-art assessments of medical conditions, physical and cognitive function, mental health, socioeconomic status, and other characteristics. A deeper understanding of what factors predict good health and which suggest poor outcomes would enable early detection and intervention to sustain health, prevent functional decline and disability, and improve quality of life.



"What we learn should be disseminated beyond our walls to our patients and residents and globally to create a better quality of life for all seniors now and in the future."

AGE OF OPPORTUNITY CAMPAIGN CO-CHAIR HINDA MARCUS



“What we’re interested in is longevity—attracting young people to the Marcus Institute and ensuring that they have the resources and opportunities that motivate them to stay.”

TRUSTEE RICHARD MARCUS AND BETH MARCUS

“We established the Mosakowski Fund for Biomarker Discovery in Aging Research to enable researchers at the Marcus Institute and the Wolk Center to research biomarkers—the biological characteristics that can be measured as an indicator of health, disease, or response to a medical intervention—to help diagnose neurological disorders such as Alzheimer’s disease and related disorders.”

BOARD MEMBER WILLIAM MOSAKOWSKI AND JANE MOSAKOWSKI

“The cutting-edge research being done at Hebrew SeniorLife’s Marcus Institute has already had a significant impact on many seniors, and the Foundation wants to support those research studies for the future generations of seniors.”

THE MURRAY A. JACOBSON FAMILY FOUNDATION



FILLING A CRITICAL NEED

Training Certified Nursing Assistants

The *Age of Opportunity* campaign was instrumental in Hebrew SeniorLife launching a Certified Nursing Assistant Training Program to fill an urgent need for workers who perform some of the most vital duties in our long-term chronic care hospital. The shortage of qualified nursing assistants is a challenge for every hospital, so Hebrew SeniorLife created a program that provides nearly 200 hours of paid training, including 25 clinical hours, 25 hours of lab training, eight hours of dementia and Alzheimer's education, and more. And because many students are recent immigrants, we also provide an English Language Learning program that includes in-class translation, tutoring, and cultural education.

The trainees are eligible for certification as CNAs and guaranteed a position at Hebrew SeniorLife or a partner organization. Not only does this fill a vital role in the health care workforce, it provides an entry point to a fulfilling career.

"The Lunder Foundation is very aware of the impending shortage of nurses, and the role that nursing education and development can play in attracting and retaining nurses to provide the best possible care for patients at Hebrew SeniorLife."

LUNDER FOUNDATION PRESIDENT
KEVIN GILLIS

SUPPORTING NURSES The Lunder Foundation

Paula and Peter Lunder have been devoted to furthering nurses' education since 2007 when they created an endowment fund in honor of Peter's mother, Anne Lunder Leland. Still an urgent need, the Lunder Foundation gave generously to the campaign to further strengthen Hebrew SeniorLife's commitment to help our nurses advance their careers, stay abreast of best practices, and develop innovative initiatives that lead the way in the care of older adults.





CREATING A CAREER PATH Mabel Louise Riley Foundation

The Mabel Louise Riley Foundation, a foundation with a special interest in supporting the needs of Boston families, donated to the *Age of Opportunity* campaign to help culinary department employees realize their dreams of building meaningful careers in the culinary and hospitality field. Our Culinary and Hospitality Immersion Program is built on a competency-based training model that empowers participants to learn the skills they will need to build a successful culinary career. The program provides training that ensures employees excel in their current roles and helps them master new skills to advance.



Memory Health

The number one health issue facing seniors today is dementia. Through the *Age of Opportunity* campaign, donors enabled Hebrew SeniorLife to introduce new research-informed care and cutting-edge services that are helping seniors maintain fulfilling lives even into the later stages of the disease. The Deanna and Sidney Wolk Center for Memory Health, launched in 2019, brings a holistic approach to the complexities of Alzheimer's disease and other causes of memory loss, supporting both patients and their families during their journey. Our research is examining innovative prevention and treatment methods.



CATALYSTS FOR CHANGE

Deanna and Sidney Wolk

From their \$5 million gift to fund the Deanna and Sidney Wolk Center for Memory Health to their generous contribution for the founding of Hebrew SeniorLife Hospice Care to their support for the renovation of the Deanna and Sidney Wolk Pavilion on our Boston campus, the Wols have changed lives through the *Age of Opportunity* campaign. The Wolk Center for Memory Health is positioned to become a national model of comprehensive dementia care, research, and education. Most recently, the Wols are supporting the creation of the Wolk Family Transportation Program, which will help older adults access services at the Wolk Center for Memory Health as well as other medical and community-based services. “We are happy to support the level of excellence at Hebrew SeniorLife,” says Trustee Deanna Wolk. “We want to help people with memory care issues and enable access to the right experts, supports, tools, and services to help them live their best lives possible.”



“When we learned of the increasing need for community-based services in brain disorders and cognition for both patients and their caregivers, we knew that our gift towards memory care services would definitely fill a void here in this area.”

SIDNEY WOLK

SUPPORTING INNOVATION Marilyn and André Danesh

Marilyn and André Danesh have been loyal supporters of Hebrew SeniorLife for more than 24 years. As generous donors to the campaign, they wanted to continue making an impact on the lives of seniors in their community like an earlier gift that named one of the buildings at Center Communities of Brookline The Marilyn and André Danesh Family Residences at 100 Centre Street. Their most recent gift funds and names the Erik D. Danesh Neuromodulation Lab, which serves both the Wolk Center and the Hinda and Arthur Marcus Institute for Aging Research. The Brain Stimulation and Neuromodulation Program at the Wolk Center offers non-invasive personalized interventions to help individuals maintain brain health, mental well-being, and cognitive function; including symptom management for those with dementia.



“We feel strongly about addressing issues neglected by the government such as care and support for seniors and families facing the challenges of aging, including dementia and mental health. Our gift to create the Erik D. Danesh Neuromodulation Lab enables the Marcus Institute to conduct research and develop treatments to help fill these gaps.”

TRUSTEE MARILYN DANESH AND
ANDRÉ DANESH

DEDICATED TO WELLNESS Steven and Michelle Bearak

“Knowing the world-class experience and expertise of Hebrew SeniorLife’s leadership, clinicians, and researchers, we know that our investment will result in research and programming that brings better health and measurable relief to seniors and families everywhere.”

TRUSTEE STEVEN BEARAK



“Hebrew SeniorLife, through the Marcus Institute and the Wolk Center for Memory Health, dramatically improves the quality of life for seniors facing Alzheimer’s disease,” says Trustee Steven Bearak. The Bearak family, which includes Judith Leary, Lisa Bearak Shuman, and Michelle and Steven Bearak, established the Eleanor and Herbert Bearak Memory Wellness for Life Program in honor of their parents to provide support for families and caregivers who experience the emotional strain of caring for their loved ones. “The program complements this support work by promoting proven lifestyle choices that enhance brain health and developing interventions that prevent and reverse the effects of Alzheimer’s disease,” explains Steven.





Above and Beyond

While we have always offered programs and services that go beyond the everyday scope of senior care, our *Age of Opportunity* campaign helped us expand our range of innovative, individualized services. The campaign has helped fund our Center for the Prevention of Elder Abuse and Neglect, expressive therapies, hospice and palliative care, spiritual care, multigenerational programming, and a new community center at Center Communities of Brookline.



"I'm pleased to support the development of additional affordable housing at Center Communities of Brookline and the expansion of its community center. Through this initiative, Hebrew SeniorLife will provide services to the entire senior population of Brookline."

BOARD MEMBER
HOWARD COHEN

EXPANDING OUR FOOTPRINT

Center Communities of Brookline

Affordable senior housing is a critical need, and the *Age of Opportunity* campaign is making an expanded indoor and outdoor community space at our Center Communities of Brookline location possible. This will benefit seniors in Brookline, including residents and non-residents. The project is part of a new building at CCB that will also include 54 senior affordable independent living apartments. The new construction at 108 Centre Street meets Passive House Standards, which will reduce energy consumption, ensure indoor air quality, and improve comfort. Donors to the campaign who directed their gifts to expanding our footprint include **Howard Cohen and Myra Musicant**, the **Hamilton Company Charitable Foundation**, **Gabrielle and Richard Henken** and the **Henken Family**.

Rabbi Jamie Kotler and Harold Kotler gave generously to the campaign in support of Hebrew SeniorLife’s Kotler H.E.L.P. Fund, which provides assistance to staff facing unforeseen hardships.

“The Kotler H.E.L.P. Fund enables Hebrew SeniorLife to be like a family safety net for its employees who give so much on a daily basis. Their commitment to clinical excellence and compassionate care makes all the difference. We are grateful to have found a way to help.”

RABBI JAMIE KOTLER AND BOARD MEMBER HAROLD KOTLER



Other campaign gifts that are helping us go Above and Beyond include:

Jack and Barbara Sobel gave a generous gift to recognize the outstanding staff at the NewBridge on the Charles Outpatient Clinic.

The Fialkow Family named the NewBridge on the Charles pool.

The Harry and Jeanette Weinberg Foundation made a gift to support a much-needed software expansion, which manages patient information and will provide a portal for families.

The Jack Satter Foundation funded general support, food, and COVID-19 relief at Jack Satter House.

“I want to make sure that the seniors we’re taking care of get the very best care—that we are treating them like we would treat our own parents—and that’s certainly the way that everything operates at Hebrew SeniorLife.”

BOARD MEMBER RICHARD HENKEN

“We are pleased to partner with Hebrew SeniorLife to create a model for using technology that will serve the health and well-being of older adults.”

EARL MILLETT
PROGRAM DIRECTOR AT THE HARRY AND JEANETTE WEINBERG FOUNDATION



Flagship Campus

As part of the *Age of Opportunity* campaign, we began revitalizing our flagship campus in Boston into an exciting epicenter of innovative senior care and programming, while also providing a more home-like environment for long-term chronic care patients and improved resources for our dedicated staff.



FAMILY ROOM



Revitalizing Our Boston Campus

With more than 500 inpatient beds, our Boston campus serves as the anchor for many key programs and services. The *Age of Opportunity* campaign has served as the initial catalyst to revitalize the campus, beginning with the 6th floor of the Berenson Allen building. Many campaign donors were key in creating a beautiful setting more conducive to person-centered care, where patients can feel at home and families can gather comfortably. The largest donors to this effort included **The Beal Family Foundation**, the **Theodore W. and Evelyn G. Berenson Charitable Foundation**, **Tom and Midge DeSimone**, **Gilda Slifka**, **Sidney and Deanna Wolk and Family**, and the **Sephardic Foundation on Aging**, which also supported the creation of a sensory suite, where patients with Alzheimer's disease and dementia can enjoy music and other forms of therapy.

The health care and senior services industries have undergone rapid and dramatic changes in the last several years and planning the future of our Boston campus is addressing the best ways Hebrew SeniorLife can continue to serve the most pressing needs of the community.





“The Boston flagship campus renovation has resulted in the creation of a model for senior care everywhere. We now have a proven patient care approach that we know we can duplicate. Our gift funded research that will benefit not only patients at Hebrew SeniorLife, but also seniors throughout the world.”

BOARD MEMBER TOM DESIMONE AND MIDGE DESIMONE

“With our campaign gift, we wanted to do something to express our deep appreciation for the wonderful care that Hebrew SeniorLife delivers to its patients—and to the families involved with their patients.”

RUTH ANN FEINBERG AND TRUSTEE EDWARD FEINBERG

Rising to the Challenge

During the last three years, COVID-19 became an incredible challenge for all of us. Many donors came to our aid, helping us meet the needs of our seniors and staff. We would like to thank each and every one of you who helped us during this time, including our **Board Chair Melissa Bayer Tearney, Marsha Alperin** and **Chair for Life Thomas Alperin**, and our generous partner, **Combined Jewish Philanthropies**.

Melissa Bayer Tearney, a volunteer leader at Hebrew SeniorLife for more than 25 years, became our Board Chair in May 2021. Along with her husband, Trustee Gary Tearney, they are passionate supporters and donors to Hebrew SeniorLife, and gave generously to the campaign and to our COVID-19 fund. "Innovation, quality, and safety are hallmarks of Hebrew SeniorLife. I am so proud of what we have achieved, together with you, our donors, and the wonderful staff of Hebrew SeniorLife."

"Our commitment to the *Age of Opportunity* campaign matches our desire to support innovative research and education in the field of senior care, provide support for cost-effective, quality health care delivery models for seniors, and foster quality living environments that support many low-income senior residents and families in need in the Greater Boston area."

MARSHA ALPERIN AND CHAIR FOR LIFE THOMAS ALPERIN

"Especially over these past few years, the care that Hebrew SeniorLife has provided its residents has been extraordinary. Combined Jewish Philanthropies is proud to support and partner with HSL in the sacred work of creating inclusive, engaging, dignified Jewish life for everyone in our community, at every stage of life."

COMBINED JEWISH PHILANTHROPIES PRESIDENT AND CEO MARC BAKER

Moving Forward



While the *Age of Opportunity* campaign comes to a close, Hebrew SeniorLife will never stop in our pursuit of helping older adults live longer, more active, and more fulfilling lives. We've made great progress but our nation remains underprepared for the overwhelming number of people who will need help through the aging process, whether for themselves or a family member. We all deserve better—and we believe Hebrew SeniorLife is exactly the right organization to continue finding creative new solutions.

You made the *Age of Opportunity* campaign a success, and for that we can't thank you enough. We hope that as we explore our next opportunity, you will continue to partner with us on the journey. Together, we will change the future of aging.

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*Deceased

EngAGE

EngAGE 2022, our ninth annual EngAGE event, held on September 12, 2022, contributed \$1.2 million toward seniors' most pressing needs. Nearly 300 guests attended the event at the Leader Bank Pavilion in Boston's Seaport neighborhood. Featured performers included actress, comedian, writer, and activist Fran Drescher and entertainer and fashion designer Isaac Mizrahi. Emmy Award-winning actor, author, director, and producer Henry Winkler joined via recorded message. Dr. Mallika Marshall, medical reporter at WBZ-TV/CBS Boston, conducted a fireside chat with President and CEO Lou Woolf. Other speakers included Lewis Lipsitz, M.D., director of the Marcus Institute and Chief Academic Officer, and Board Chair Melissa Bayer Tearney.

We are deeply grateful to our EngAGE 2022 sponsors, whose gifts are supporting Hebrew SeniorLife's mission to redefine the experience of aging.

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Fashion designer Isaac Mizrahi (left) and actress Fran Drescher (second from right), with President and CEO Lou Woolf and his wife, Sarah Woolf.

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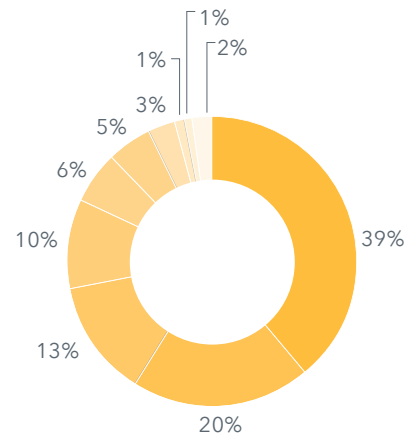
2022

Hebrew SeniorLife ended Fiscal Year 2022 with an operating cash flow deficit, as consolidated operating expenditures exceeded operating revenues by \$7.8 million. Approximately \$6.2 million of the deficit was offset by the organization's planned spend rate on its primary investment pool, leaving approximately \$1.6 million uncovered due to unreimbursed pandemic-related spending.

Operating revenues increased by 6.8% to \$267.5 million in FY2022, and earnings before interest, taxes, depreciation, and amortization (EBITDA) improved from \$15.5 million to \$18.6 million over the prior year. The revenues reflect higher census due to the rebound from the pandemic and include approximately \$4.3 million of COVID-19 relief funding.

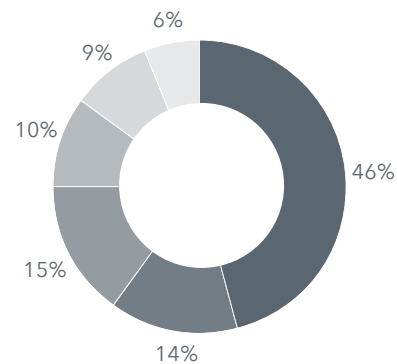
Operating expenses rose by 5.0% in FY2022 due to costs associated with the pandemic (personal protective equipment, COVID-19 testing) and higher labor costs due to staff shortages and pay adjustments to stay competitive within the market. Regular capital expenditures were higher by \$2.9 million as compared to the prior year, due to COVID-19 restrictions being lifted.

With respect to the investment pools plus cash reserves at HSL and affiliates, the aggregate balance remained strong despite it decreasing from approximately \$243 million to \$218 million due to unfavorable capital market conditions.



Operating Revenues (Cash Based) (\$000)

● HSL Parent and HRC-Roslindale	\$104,842
● HRC-Newbridge	53,930
● NewBridge IL/AL	34,741
● Orchard Cove	27,798
● Center Communities of Brookline	15,255
● Home & Community Based Services	12,862
● Jack Satter House	8,376
● Simon C. Fireman Community	3,955
● Fundraising Receipts	1,390
● COVID-19 Stimulus Funding	4,349
Total Operating Revenue	267,498



Operating Expenditures (Cash Based) (\$000)

● Salaries and Benefits	\$127,659
● Supplies	39,766
● General and Administrative	41,752
● Facility and Other Costs	26,228
● Debt Service	24,952
● Capital Expenditures	14,921
Total Operating Expenditures	275,278
Operating Cash Flow	(7,780)

Saying Goodbye ... and Hello



Louis J. Woolf

After 14 extraordinary years at Hebrew SeniorLife, President and CEO Louis J. Woolf retired in July 2023. He leaves a legacy of strong, compassionate leadership, working to reimagine aging through outstanding health care, inclusive senior living communities, influential teaching, and rigorous research. Throughout his tenure, Lou often expressed his desire to help every senior live their very best life in the best place for them. His dedication to Hebrew SeniorLife's mission has helped us grow tremendously, and we will always remember his fortitude and vision during COVID-19, and his commitment to the success of the *Age of Opportunity* campaign.



Steve Landers, M.D., MPH

And now we are excited to welcome our new president and CEO, Steve Landers, M.D., MPH, to Hebrew SeniorLife. Dr. Landers comes to Hebrew SeniorLife from Visiting Nurse Association Health Group, one of the most respected home health, hospice, and community health organizations in the country, where he served as president and chief executive officer from 2012 to 2023. He is a practicing physician, certified in family medicine, geriatric medicine, and hospice and palliative medicine and also holds an appointment as clinical associate professor of family medicine and community health at the Rutgers Robert Wood Johnson Medical School.

"I am honored to join Hebrew SeniorLife, an innovative and caring organization that shares my own values of *tikkun olam*—to heal the world."

DR. STEVE LANDERS
PRESIDENT AND CEO
HEBREW SENIORLIFE

What's Your Impact?

When you give to Hebrew SeniorLife, you invest in the autonomy and well-being of seniors—today and for generations to come. Your generosity fuels health care, communities, research, and teaching that are redefining the experience of aging.

To inquire about leadership-level gifts that can impact specific Hebrew SeniorLife programs, or to learn about making a bequest or life-income gift, please contact:

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HEALTH CARE

Hebrew Rehabilitation Center, Boston and in the Gloria Adelson Field Health Center at NewBridge on the Charles, Dedham

- Long-term chronic care
- Post-acute care
- Outpatient services

Hebrew SeniorLife Community Health Services

- Deanna and Sidney Wolk Center for Memory Health
- Primary and specialty medical care
- In-home care
- Hospice care
- Adult day health

RESEARCH

Hinda and Arthur Marcus Institute for Aging Research

TEACHING

Education and training programs for the next generation of geriatric professionals

SENIOR LIVING COMMUNITIES

SUPPORTIVE LIVING COMMUNITIES

Center Communities of Brookline

- Julian and Carol Feinberg Cohen Residences
 - Marilyn and André Danesh Family Residences
 - Diane and Mark Goldman Family Residences
- Simon C. Fireman Community, Randolph
Jack Satter House, Revere
Leyland Community, Dorchester

CONTINUING CARE RETIREMENT COMMUNITIES

Orchard Cove, Canton

NewBridge on the Charles, Dedham on the Dr. Miriam and Sheldon G. Adelson Campus

ASSISTED LIVING COMMUNITIES

NewBridge on the Charles, Dedham

- Jack Satter Assisted Living Residences
- The Gilda and Alfred A. Slifka Memory Support Assisted Living Residences