

# 2023 ETHOS ANNUAL REPORT

JULY 2022 - JUNE 2023



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## A LETTER FROM CEO VALERIE FRIAS

### Dear Friends,

As we reflect on the past year, I am humbled and inspired by the unwavering commitment of our community and the impactful strides Ethos has made in the lives of Boston's seniors. Despite the challenges, our dedicated team, volunteers, and supporters have stood together, demonstrating the resilience and strength that defines Ethos.

The heart of Ethos lies in our mission to serve the unique needs of older adults, ensuring they age with dignity, comfort, and support. In the past year, we have expanded our reach, delivering over 2.4 million meals to seniors at home and in community dining sites. Our health services, including over 1,000 health screenings and 467,000 hours of home health aide and homemaker services, have empowered more than 1,300 older adults to maintain their independence.

Ethos has also been at the forefront of addressing the challenges faced by LGBTQ+ elders, sponsoring programs that create safe and affirming environments, fostering friendships, strengthening support networks, and rebuilding resiliency. Events like the Senior Pride Luncheon, with over 350 LGBTQ+ elders, exemplify our commitment to inclusivity.

In addition to our work with LGBTQ+ elders, Ethos is deeply committed to serving diverse communities across Boston. Our staff and board reflect the BIPOC communities we serve, and our programs and services are delivered with cultural competency. From language-specific outreach to culturally relevant programming, we strive to ensure that all seniors receive the support and care they deserve, regardless of background or identity.

None of this would be possible without the support of our community, and I extend my deepest gratitude to each donor, volunteer, and advocate. Your generosity propels Ethos forward, allowing us to continue our vital work and make a lasting impact on the lives of Boston's seniors.

As we navigate the future, I am confident that Ethos will continue to be a beacon of support for older adults. Together, we can create a community where every senior has the opportunity to age with dignity and enjoy a fulfilling life.

We're excited to share more about our accomplishments in this annual report. It's a testament to the collective effort and commitment of our community. Thank you for being an integral part of Ethos' journey.

With sincere appreciation,

Valerie Frias

# ETHOS' MISSION

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Ethos is a private, not-for-profit organization that promotes the independence, dignity, and well-being of the elderly and disabled.

Ethos achieves its mission through the coordination and delivery of high-quality, affordable home and community-based care.

In all aspects of its work Ethos supports family caregiving, fosters social interaction and respects cultural diversity.

# HISTORY

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In 1972, Massachusetts Office of Elder Affairs issued a call for grassroots coalitions to support a program to keep elders out of nursing homes. Called "Home Care," it was one of the nation's first efforts to create an alternative to the institutional models of caring for the elderly that had prevailed since the poorhouse.

That August, a group of southwest Boston seniors and providers formed the Ad Hoc Coalition for the Elderly. In its first report to the state, it found "meager resources wasted by duplication... and lacking organized means of efficiently referring older people to sources of help." It was a problem the group decided to take on.

In March, 1973, the Coalition incorporated as Southwest Boston Senior Services – the city's first, neighborhood-based not-for-profit organization devoted solely to keeping the elderly and disabled at home. One year later, it began operations out of a Roslindale storefront with a staff of four and funding for one elder lunch site and a Meals on Wheels route.

Today, that agency is Ethos, a \$56 million organization that promotes the dignity and independence of almost 3,000 elderly and disabled persons. Among its designations, it is a state Aging Services Access Point, the Elder Nutrition Project project for the entire city of Boston, serving more than 2.4 million meals annually, and a Long-Term Care Ombudsman. Despite years of growth, Ethos remains rooted in the principles of care, compassion and community that guided its founders.





## TRANSFORMING LIVES: A SENIOR'S GRATEFUL JOURNEY



I wanted to take a moment to express my heartfelt gratitude for the incredible impact Ethos' Healthy Aging programs have had on my life.

First and foremost, the 'Unlocking Technology for Seniors' seminar was a game-changer for me, and I can't thank you enough for the phenomenal gift of a Dell laptop. This has become an invaluable tool in staying connected with my family, faith, healthcare providers, and, of course, with Ethos itself. The accessibility to classes, seminars, and case managers has truly enriched my life.

Before discovering Ethos, I was homebound due to my disability. The classes in balance, particularly the ones focused on preventing falls, have been a lifeline for me. Additionally, the 'Chronic Pain Self Management Program' and 'Memory Training' classes were not only enjoyable but also instrumental in addressing my health concerns and bringing them to the attention of my healthcare providers.

Ethos is more than just an organization; it's a gem in our city. The dedication and support you provide help us stay connected to the people and places we need, fostering a sense of community and well-being. I am genuinely grateful for all that Ethos does, and I wanted to take a moment to say a heartfelt thank you.

You are all a positive reflection in our lives, making a significant difference. Thank you again for your unwavering commitment to enhancing the lives of those you serve.



Donna Marie, Roslindale, MA

# OUR IMPACT IN THE COMMUNITY

Ethos is a nonprofit organization committed to improving the lives of older adults and disabled individuals in Boston. Since our founding in 1973 by a coalition of community activists, our goal has been to enable individuals to remain in their homes for as long as possible and prevent the need for institutional care.

To achieve this goal, Ethos provides a wide range of high-quality services and supports, delivered both at home and in the community, at little or no cost. Our services include Meals on Wheels, home care, case management, and culturally appropriate programs. Many of our programs, which were groundbreaking at the time, have now become national standards. Our ability to innovate remains as strong as ever, and we continue to develop new programs to meet the evolving needs of our community.

Our commitment to the independence, dignity, and well-being of older adults and disabled individuals, and keeping them at home, is at the heart of everything we do because home is Where the Heart Is.



# NUTRITION

## Nourishing Lives Since 1973

For nearly five decades, Ethos's Nutrition Program has been a pillar of support, contributing to the well-being of seniors in Boston. Since its inception in 1973, our program has become an integral part of the community, standing tall among over 5,000 local Senior Nutrition Programs in the United States. Through our innovative and compassionate approach, we have delivered well over 2,432,000 meals to seniors across the city, fostering health and connection. Our commitment goes beyond just providing meals; we offer a dual approach through home-delivered meals, affectionately known as Meals on Wheels, and the vibrant Community Cafés, where seniors can come together for nutritious and enjoyable meals. To ensure holistic well-being, our program extends to nutrition check-ups and counseling facilitated by a licensed dietitian.



**2,432,000+**

Meals Served

**9,500+**

Consumers Served

**37**

Dining Sites

**68%**

said home delivered meal is their main meal of the day

**78%**

said home delivered meals allows them to eat healthier

**72%**

said home delivered meals help them live independently

**64%**

said the driver help make them feel less lonely



# CARE MANAGEMENT

## Bringing Compassionate Support to the Community

Ethos' Home Care Program is not just a commitment but a tangible force, empowering individuals aged 60 and above to age gracefully at home. Our unwavering dedication is reflected in the numbers: a remarkable 467,181 hours of in-home care, blending essential homemaking services with the skilled support of Home Health Aides. This translates into 501 new consumer intakes, expanding our reach to 1,349 Home Care consumers. The impact extends beyond numbers, with a total of 3,295 home visits ensuring personalized care and advocacy. Moreover, our Options Counseling services have touched the lives of 93 consumers and families, offering crucial guidance. The commitment to providing a secure living environment is mirrored in the 3,549 Personal Care Attendant consumers we serve.

**467,000+**

Hours of In-Home Care

**3,200+**

Home Visits



**3,500+**

Personal Care Attendant Consumers

**1,300+**

Home Care Consumers

**1,000+**

Nursing Assessments

**500+**

New Consumer Intakes

**90+**

Options Counseling Consumers/Families

# HEALTHY AGING

## Thriving Communities, Active Lives

Ethos' Healthy Aging Program, which includes AgeWell and the innovative Senior Center Pilot initiative, stands as a beacon for fostering vibrant communities and active lives among seniors. In 2023, over 2,200 seniors actively participated in a diverse array of more than 20 programs, classes, activities, and events. The offerings spanned a wide spectrum, including falls prevention, health and wellness, and invigorating exercise sessions. With a robust calendar, the program hosted over 700 hours of classes and organized more than 600 individual classes and events, creating a dynamic and engaging environment that promotes the physical, mental, and social well-being of our senior community.



## HEALTHY AGING PROGRAMS

- A Matter of Balance
- AgeWell Holiday Party
- Bingocize
- Bingocize (Virtual)
- Candidate Forum 10th Suffolk District
- Conversations on Aging: Aging with a Positive Attitude
- Conversations on Aging: Falls Prevention
- Count Your Blessings
- Healthy Eating
- My Life My Health Chronic Disease Self Management
- Octoberfest
- Parkway Seniors Forum
- Salute to Summer
- Senior Center Pilot
- Senior Prom: Hearts of Gold
- Tai Chi
- Tai Chi Club
- Tai Ji Quan: Moving for Better Balance
- Tai Yo Ba
- Technology Training
- Stay Sharp: UCLA Memory Training
- Virtual Community Cafe Hour
- Walk with Ease Exercise Challenge

**700+**

Hours of Health and Wellness Classes

**600+**

Individual Classes/Events

**2,200+**

Program Participants

**20+**

Different Programs



**2,250+**

Health Insurance  
Counseling (SHINE)  
Consumers

**50+**

Depression  
Counseling  
Consumers

**70+**

Elder Mental Health  
Outreach Team  
Consumers

**190+**

Total Volunteers

**120+**

Friendly Visitor  
Consumers

**270+**

Boston Money  
Management  
Program Consumers

## COUNSELING AND SUPPORT SERVICES

### Navigating Life's Challenges Together

Whether it involved understanding Medicare benefits, financial management, or participating in our mental health programs, Ethos remained steadfast in its commitment to empowering individuals to make informed choices. Our Medicare Counseling provided invaluable assistance in navigating the complexities of health insurance, while the Money Management program offered practical support with budgeting, bill payments, and addressed potential challenges like eviction or utility shutoff. The indispensable role of Ethos Volunteers provided companionship and grocery shopping assistance, among other services.





## SUCCESS STORY:

# FROM ISOLATION TO EMPOWERMENT



Meet Jane, an inspiring 87-year-old woman who courageously reached out to Ethos and the support of its Healthy IDEAS program to confront the shadows of depression clouding her golden years. Jane's journey is a testament to the transformative power of Ethos' elder mental health intervention.

Healthy IDEAS, Ethos' innovative program, empowers individuals like Jane to navigate the complexities of mental health in their later years, fostering resilience and well-being.

Jane's life was marked by profound challenges – a history of childhood trauma, no living family, and the looming threat of eviction had left her isolated and paralyzed by the impending crisis. Her apartment mirrored the chaos within, cluttered and disorganized, with a self-imposed isolation lasting over two years due to a crippling sense of shame.

At the beginning of her journey, Jane grappled with a multitude of depressive symptoms – dissatisfaction with her life, a sense of emptiness, boredom, fear, unhappiness, and helplessness. A specially trained Ethos counselor, through empathetic rapport building, highlighted the potential of the Healthy IDEAS program, dispelling

the misconception that depression is a normal part of aging.

Identifying housing, organizing her living space, and reconnecting with others emerged as Jane's primary goals. Over 18 sessions, she transformed from needing minute steps to managing her goals proactively, with the steadfast support of the Ethos counselor.

In her own words, "the only thing that is holding me together is I could talk to you each week and I could say what I have accomplished," a testament to the power of expressing her struggles through the tools employed in their sessions.

Jane's achievements are a testament to her resilience: completing 15 housing applications, successfully re-certified for her current apartment, empowered herself to discuss depression and health issues with her doctor, initiated anti-depressant medication, actively participated in social activities, took regular walks with a newfound friend, and found the courage to seek assistance in cleaning her apartment from a friend.

Through Ethos' Mental Health programs, Jane, and many others desperately in need of support, are addressing their depression and emerging as empowered individuals, taking charge of their well-being, forging connections, and transforming their lives. Through Healthy IDEAS, Ethos continues to make a profound impact on elder mental health, one success story at a time.



# ETHOS 50TH ANNIVERSARY GALA

Where the Heart Is, Ethos' 50th Anniversary Gala, was an inspiring celebration of compassion and community. Together, we raised over \$360,000, making this the most successful fundraising event in Ethos' history. Our generous sponsors and supporters helped us knock it out of the park - Fenway Park that is!



This single initiative has enabled Ethos to provide thousands of meals in our Community Cafes, enhance our programming for LGBTQ+ older adults and launch personalized action plans to enhance the mental well-being for the isolated and homebound clients we serve. The success of the gala reaffirms our commitment to promoting the independence, dignity, and well-being of older adults and people with disabilities in our community.

Many thanks to our Anniversary Event Co-Chairs, Ellen Grubert, Janis Lippman, Stella Marquez-Murray and Juan Murray, our Honorees, Reverend Irene Monroe, José Massó and Sheldon Lloyd and the hundreds of guests who joined us to launch our mission into the next 50 years of impact.





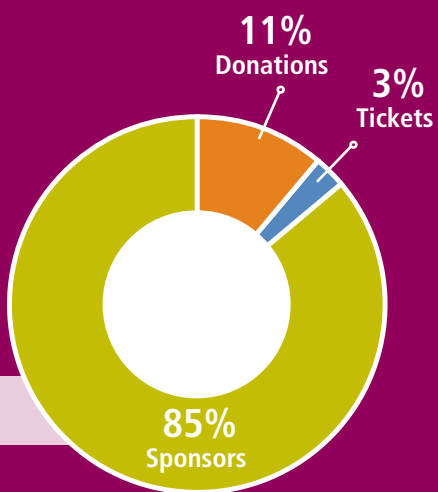


## GALA OVERVIEW

### GALA REVENUE

● Sponsorships	\$305,000
● Donations	\$40,578
● Tickets	\$11,250

**TOTAL \$361,829**



### GOAL

**\$325,000**

### TOTAL RAISED

**\$361,829**





# NEW AND NOTABLE

## ANNUAL PRIDE LUNCHEON

### A CELEBRATION OF UNITY AND INCLUSIVITY

In collaboration with Mayor Michelle Wu and the Age Strong Commission, Ethos proudly presents the Annual Pride Luncheon, a beacon of unity for LGBTQ+ seniors, friends, allies, and supporters. This year marked an extraordinary milestone as the event experienced unprecedented demand, with an impressive attendance of 350 individuals hailing not only from various corners of the Commonwealth but also from neighboring New England states. This celebration has evolved into one of the largest gatherings of LGBTQ+ older adults in New England, transcending geographical boundaries to create a powerful testament to the importance of community, inclusivity, and shared celebration.



## SENIOR CENTER PILOT

### WEAVING VIBRANT COMMUNITY CONNECTIONS

The heartbeat of Ethos resonates through our Senior Center Pilot Program, welcoming over 100 seniors twice per week into a tapestry of engagement that defines the essence of community connection. Seniors find joy and purpose through a meticulously crafted schedule of activities, from invigorating exercise sessions promoting physical well-being to wellness programs addressing holistic health. The program also ensures that no one goes hungry, serving both breakfast and lunch, creating a warm and communal atmosphere around shared meals.



## ANNUAL SENIOR PROM

### HUNDREDS CELEBRATE THE RETURN OF AN ETHOS TRADITION

Ethos' Annual Senior Prom, a beloved tradition, triumphantly returned in 2023 after a hiatus since 2019 due to the challenges posed by the COVID-19 pandemic. Drawing seniors from diverse communities, last year's event welcomed 375 attendees, symbolizing resilience and community strength. The Senior Prom stands as a testament to Ethos' commitment to fostering a vibrant and engaged community among older adults, transcending geographical boundaries to create an inclusive celebration for seniors from all over the city of Boston and beyond.



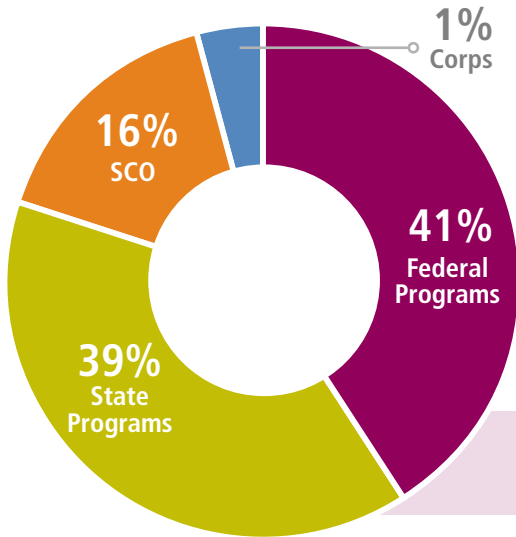
## ELDER MENTAL HEALTH OUTREACH TEAM

### EXPANDING ACCESS, EMPOWERING WELL-BEING

In 2023, Ethos expanded the Elder Mental Health Outreach Team (EMHOT) program, broadening its reach to serve the Spanish-speaking community with a focus on language and cultural appropriateness. Centered on individuals aged 60 and above in Boston, EMHOT stands as a person-centric, flexible Behavioral Health initiative. Specially trained counselors build trust through in-home visits, counseling, and therapy, addressing immediate needs and providing long-term support. The program encompasses a range of services, including needs assessments, connecting individuals to community-based therapy, and linking to resources such as Home Care, Medicare counseling, volunteer and employment opportunities, SNAP benefits, transportation resources, and Healthy Aging classes.

JULY 2022-JULY 2023

# FINANCIAL OVERVIEW



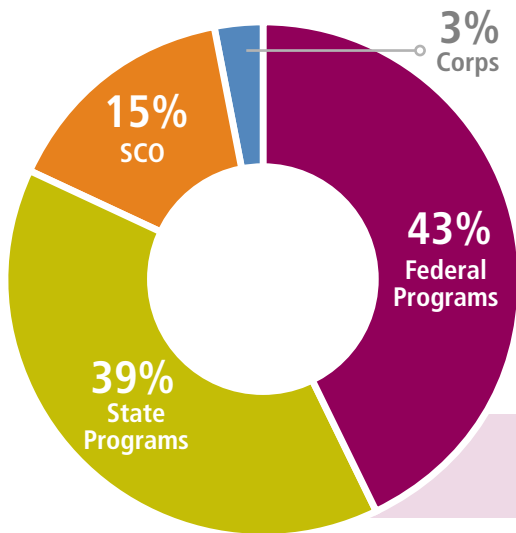
## PROGRAM REVENUE

2023

Federal Programs	\$23,321,399
State Programs	\$21,809,811
Senior Care Options Corporation (SCO)	\$9,087,574
Corporate Programs	\$2,487,568

## TOTAL REVENUE

**\$56,706,352**



## PROGRAM EXPENSES

2023

Federal Programs	\$23,358,730
State Programs	\$21,208,447
Senior Care Options (SCO)	\$8,082,015
Corporate Programs	\$1,656,264

## TOTAL EXPENSES

**\$54,305,456**

- **Federal Programs**  
 Title IIIB Supportive Services  
 Ombudsman  
 Title IIIC Meals
- **State Programs**  
 Home Care  
 Long Term Care

Clinical Assessment Eligibility  
 Personal Care Attendant

- **Senior Care Options (SCO)**

- **Corporate Programs**  
 Accountable Care/ONECARE  
 Elder Mental Health

JP@Home  
 Healthy Aging/AgeWell  
 LGBTQ+  
 Residence Services Coordinator  
 Veteran's Independence Plan

# NOTABLE INVESTORS & SUPPORTERS

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## **\$100,000 and Above**

City of Boston, Age Strong Commission  
Commonwealth of Massachusetts, Executive Office Of Elder Affairs  
Commonwealth of Massachusetts, Executive Office of Health and Human Services  
Parkway in Motion

## **\$50,000- \$99,999**

Comcast NBCUniversal  
Emily's Inc.  
Mabel Louise Riley Foundation

## **\$25,000- \$49,999**

Anonymous Donor  
The Boston Foundation  
City of Boston, Mayor's Office of Workforce Development  
James and Sarah Dyer Charitable Fund  
The Walker Family/WCI Corp./ SRT Realty, LLC  
The Warren Alpert Foundation

## **\$10,000- \$24,999**

Boston Evening Clinic  
The Boston Scientific Foundation  
The Boston Foundation Equality Fund  
Boston Bruins Foundation  
Charles F. Bacon Trust  
Charles H. Farnsworth Trust  
City Fresh Foods  
Eastern Bank Charitable Foundation  
Grimes-King Foundation For The Elderly  
Liberty Mutual Foundation  
Nutter, McClennen, & Fish LLP

Suburban Home Health Care, Inc.  
Wells Fargo Charitable Giving

## **\$5,000-\$9,999**

Aegon Transamerica Foundation  
Alavi & Braza, PC  
Anodyne Homemaker Services  
Chris and Rick Berk  
Berkshire Bank  
The Boston Foundation  
Boston Medical Center  
Central Boston Elder Services  
The Cooperative Bank  
John Cragin and Mary Fife  
Dedham Savings Bank  
Effie's Homemade  
Elder Achievers  
Ellen Grubert and Janis Lippman  
Amos and Barbara Hostetter  
Katharine C. Pierce Trust  
Law/Stroud Foundation  
Leslie and David McClain  
Mount Pleasant Home and Springhouse of Pleasant Spring Communities  
Juan Murray and Stella Marquez-Murray  
New England Patriots Charitable Foundation  
Rockland Trust Charitable Foundation  
Point32Health  
The TJX Foundation  
United Healthcare Workers East 1199 SEIU  
Universal Benefit Plans

## **\$1,000-\$4,999**

AAA Northeast  
AARP Massachusetts State Office  
The Ahn Family Foundation

All At Home Health Care  
Anodyne Homemaker Services  
Anonymous Donor  
Associated Home Care  
The Benevity Community Fund  
The Boston Red Sox Foundation  
Boston Senior Home Care  
Mary Griffin Bray and Bruce Bray  
Marcia Brown  
Vincent James Burton  
Cabot Risk Strategies  
Cambridge Trust  
Centre Cuts Salon and Spa  
Thomas Cohan  
Daniel Kelly  
Dedham Savings Bank  
Nick and Diane Favorito  
Friendly Care, Inc.  
Thomas Geraty and Stuart Walker  
Global Healthcare Services  
Hansen-Furnas Foundation  
Brady Hurt  
Juilette Johnson  
The Law Office of David A. Camiel  
Lisa J. Drapkin and Debbie Lewis  
LGBTQ Senior Housing Inc.  
Littler  
Rob Mancuso  
Midtown Home Health Services  
Bob O'Malley  
Sue Reamer  
Red Sox Foundation  
Celia Segal  
Save the Harbor/Save the Bay  
Seraphic Springs Health Care  
Somerville-Cambridge Elder Services  
Sophia Snow Place  
U.S. Bank Home Mortgage



# BOARD OF DIRECTORS

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President, Executive Committee  
Chair

Juliette Johnson  
Vice President

Craig McAnaugh  
Treasurer

Susan Kuriakose  
Secretary

Marcia Brown  
Governance Committee Chair

Debbie Nolan  
Quality Assurance Committee  
Chair

Tish Allen

Marie Borgella

Tom Cohan

John Dobija

Ronald Lammy

Edna Pruce

Yan Lin

## WAYS TO GIVE

# HOW YOU CAN HELP

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### MAKE A DONATION

Your generosity fuels our mission and enables us to provide essential services and programs to those in need. Every dollar counts and directly contributes to enhancing the quality of life for seniors and disabled individuals in our community.

### VOLUNTEER YOUR TIME

Nothing is more valuable than the gift of your time and compassion. Join our team of dedicated volunteers and lend a helping hand to those who need it most. Whether it's delivering meals, providing companionship, or assisting with administrative tasks, your efforts will truly make a difference in the lives of others.

### ADVOCATE FOR SUPPORT

Be a voice for change and advocate for increased support and resources for programs serving seniors and disabled individuals. Whether it's raising awareness in your community, contacting local officials, or participating in advocacy campaigns, your advocacy efforts can help amplify the voices of those who often go unheard.

Together, we can create a more inclusive and supportive community where seniors and disabled individuals can thrive.

Visit [www.ethocare.org](http://www.ethocare.org) to learn more about our initiatives and how you can get involved.





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