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**IMPACT**  
THE 2008 ANNUAL REPORT



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# DEAR FRIENDS AND SUPPORTERS,

**Whew!! It was quite a year. Turning 100 years old turned out to be a lot of work, and a lot of fun. We had, and continue to have, a lot to celebrate.**

- **A great history of serving Cleveland's seniors through high quality services.**
- **A long tradition of research, developing innovative approaches, and sharing our results around the country and even internationally.**
- **A history of deep and lasting partnerships with like-minded organizations and individual professionals, which have helped to expand our reach and to extend the effect of what we have done, and continue to do, even when the name Benjamin Rose Institute is not out in front.**

In short, whether publicly acknowledged or not, the Benjamin Rose Institute has a 100-year tradition of having an impact on the lives of older people, the agencies that serve them and the systems that support those agencies.

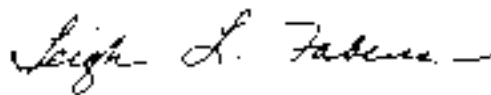
Obviously, we had been planning for this year for awhile. Milestones like this are not exactly a surprise, at least not to those of us who work for such venerable institutions. Beginning in the fall of 2007, in partnership with the Cuyahoga County Public Library system, we launched a series of 31 presentations in 19 branch libraries. In May, we had the Assistant Secretary for Aging (the highest ranking public official in the aging network in the U.S.), Josefina Carbonell as the speaker for our Annual Meeting. In July, we sponsored the first Katz Advocacy Award in conjunction with the Western Reserve Area Agency on Aging's Independence Awards celebration.

The pace picked up with three events in September, including our Annual Fall Conference and Luncheon entitled "Aging Your Way," fielding the largest team at the annual National Alliance on Mental Illness (NAMI) walk, and hosting nationally recognized gerontologist and social historian Dr. Andrew Achenbaum as our Annual Katz Policy Institute Lecturer.

The capstone event was our 100th Anniversary Celebration at the Union Club. 250 friends, supporters, former board members and employees—all members of the Benjamin Rose family—came together for an evening of sharing and celebration. We reflected on our past, celebrated our accomplishments, discussed our future, and raised a toast to the man whose vision made it all possible, Benjamin Rose, himself a Union Club member. We raised some money too, to support our new work in the Katz Policy Institute. We think Mr. Rose would have been pleased.

The hard thing about turning 100 is that as soon as the party is over, you have to start working on the next 100. The world that we operated in for our first one hundred years is changing rapidly. We are in the most challenging economic time in decades, which presents substantial challenges for an organization that historically has relied on its trusts for so much of its support. Our strategic planning process will help us to assess our options and plan a course forward, which will have to be guided by prudent use of resources and an eye towards capturing new sources of support for our mission.

The good thing about turning 100 as an organization is that you know, if you think strategically and act wisely, you will survive difficult times and be ready for advances in better times. More importantly, you will have learned that the mission—serving older people, learning how to better meet their needs, and advocating to advance the larger system in which we work—will only grow in importance. We have learned that even though we are only one organization, in ways that are direct and indirect, we can and will have an impact on the lives of older people. We're already working on having an even greater impact in our second century.



Leigh L. Fabens  
Chairman, Board of Directors



Richard Browdie  
President/CEO

# YEAR IN REVIEW



Former U.S. Assistant Secretary of Health and Human Services Josefina Carbonell (right) chats with BRI Emeritae Board Members Shirley Gibson and Mary Groves at the BRI annual meeting.

The Benjamin Rose Institute celebrated its 100th anniversary throughout 2008. Events were planned during the year for consumers, staff, donors, friends and others, culminating in a Centennial Gala Celebration in October (see page 6). Partnerships were established and programs put in place that will provide a solid foundation for BRI to move into its second century.

Programs on dementia, housing, guardianship and other aging issues were presented by Benjamin Rose Institute (BRI) experts in the Cuyahoga County Public Library system throughout 2008. The partnership, which helped kick off BRI's centennial in fall 2007, led to presentations in other venues across Cuyahoga County, including senior centers, assisted living facilities and other locations.

The Katz Policy Institute of Benjamin Rose spearheaded the creation of the Northeast Ohio Regional Network of the American Society on Aging in 2008. The group brought together professionals in the field of aging from across the region for informative programs and informal networking. In February, State Senators Capri Cafaro and Robert Spada discussed issues facing legislators as Ohio's elderly population increases. In June, Katie Maslow, Associate Director of the National Alzheimer's Association, discussed the links between research, practice and policy in relation to family caregiving.

Continuing education programs were presented for social workers and nurses on a range of topics including professional ethics, mental health issues and others. In fall 2008, BRI began offering continuing education credits for counselors as well with a program on supervision. Hundreds of area professionals benefitted from the informative, educational programs during the year.

On May 8, 2008, U.S. Assistant Secretary of Health and Human Services Josefina Carbonell was the guest speaker at the BRI annual meeting at Myers University Club. The Assistant Secretary shared information on how the Administration on Aging (AoA) is working to align the national aging network. BRI President & CEO Richard Browdie also spoke, outlining BRI's role in helping AoA achieve its objectives. BRI co-sponsored the Assistant Secretary's Friday Forum presentation at the City Club of Cleveland the following day.

The Katz Policy Institute conducted a "State Readiness Review," as part of the Aging Strategic Alignment Project, a three-year collaborative agreement with AoA. The review focused on gathering detailed information from state units on aging (such as the Ohio Department on Aging) on home- and community-based service systems in each state and how well the states are equipped to expand the availability of these services and support to consumers. The information to profile each state was gathered in 2008 and will help provide a more complete picture of the Aging Network's capacity to fulfill federal mandates under the Reauthorization of the Older Americans Act. Forty-eight states and the District of Columbia participated in the review.

BRI partnered with the Cleveland Area Chapter of the Alzheimer's Association and the University Hospitals Neurological Institute to present an Early Stage Town Hall Meeting on May 31. The panel discussion and open forum drew 180 people. Among the participants were individuals with memory loss who shared their experiences with receiving a dementia diagnosis, communication with health care professionals, accessing resources, and other issues. Results of the town hall, which were evaluated by the Margaret Blenkner Research Institute of Benjamin Rose, will contribute to the efforts of the National Alzheimer's Association to identify the needs of individuals with early-stage dementia, and to develop programming and services to assist them.



David Bass, PhD, (left) BRI Vice President for Research, was among the panelists for the Early Stage Town Hall Meeting co-sponsored with the Cleveland Area Chapter of the Alzheimer's Association and the University Hospitals (UH) Neurological Institute. Also pictured, Sharen Eckert and Paula Ogrocki, PhD, of UH.



In July, BRI joined the Western Reserve Area Agency on Aging (WRAAA) in recognizing individuals and organizations who promote the independence of older adults. BRI sponsored the inaugural Katz Advocacy Award to recognize efforts to improve public policies that advance the health, independence and dignity of older adults. The

Katz Award was presented to Sandy Calvert of Medina for her work with the HANDS Foundation. The award is named in honor of Sidney Katz, MD, BRI's Distinguished Scholar.



Sandy Calvert (center), recipient of the first Katz Advocacy Award with WRAAA Executive Director Ron Hill and BRI President & CEO Richard Browdie.

The Margaret Blenkner Research Institute (MBRI) was engaged in 17 research projects during 2008, including 4 newly funded studies. MBRI researchers shared their findings through more than 30 presentations at conferences and publications in professional journals.

The Wellness Network, a three-year project funded by the Aetna Foundation, continued to test an intervention for older adults with depression and their family caregivers called Care Consultation. Approximately 85 older adults diagnosed with depression and their family caregivers participated in the project conducted by the Margaret Blenkner Research Institute of Benjamin Rose. Participants were recruited through primary care physicians at the Senior Health and Wellness Center and The MetroHealth System. The research will be completed in fall 2009.

The programs of the Eldercare Services Institute (ESI) experienced a 8.7% increase in the number of clients served in 2008 compared to the previous year. The majority of the clients were women (75.6%), about half (48.4%) were Caucasian, and about half (49.4%) lived alone.

Case management, counseling and other social services were provided to 419 clients of the Social Work Department. The Mental Health Program served 471 adults aged 55 and older who are living with mental illness or addiction. ESI Home Care provided skilled nursing, personal care and other home-based services to 414 clients. Eighty-eight older adults were served by the Adult Day and Partial Hospitalization Programs.

Eighty-three volunteers in the Senior Companion Program provided 35,176 service hours to nearly 100 clients.

In September, BRI sponsored its annual fall conference and luncheon, "Aging Your Way." Area professionals attended morning sessions on topics related to helping older adults remain independent in the

community. Speakers included Jim Collins, PhD, of Provider Services; Ronni Stern, PhD, and Anthony Stern, PhD, of Creative Action, LLC; Harvey Stern, PhD, of the University of Akron; and Linda S. Noelker, PhD, Farida Ejaz, PhD, and Melissa Castora, MA, of the Katz Policy Institute of Benjamin Rose. MythBusters Cris Branche, Mina Kulber, Steve Bullock and the late Bill "Smoochie" Gordon participated in a panel discussion moderated by Terri Moir of WDOK sharing their experiences and thoughts on "aging their way."



MythBusters Steve Bullock, President of the Bullock Group (right), and the late Bill "Smoochie" Gordon participated in a panel discussion on "Aging Your Way" at BRI's annual conference and luncheon.

Social historian Andrew Achenbaum, PhD, of the University of Houston presented the 2nd Annual Katz Policy Lecture on September 26. Dr. Achenbaum shared his thoughts on the history and future of gerontology in his presentation titled "Another Bend in the Road: U.S. Gerontology Approaches Its Centennial."



BRI President & CEO Richard Browdie (left) and speaker Dr. Andrew Achenbaum at the 2nd Annual Katz Policy Lecture.



Dr. Sidney Katz (left) talks with guest Thomas Frutig following the 2nd Annual Katz Policy Lecture.

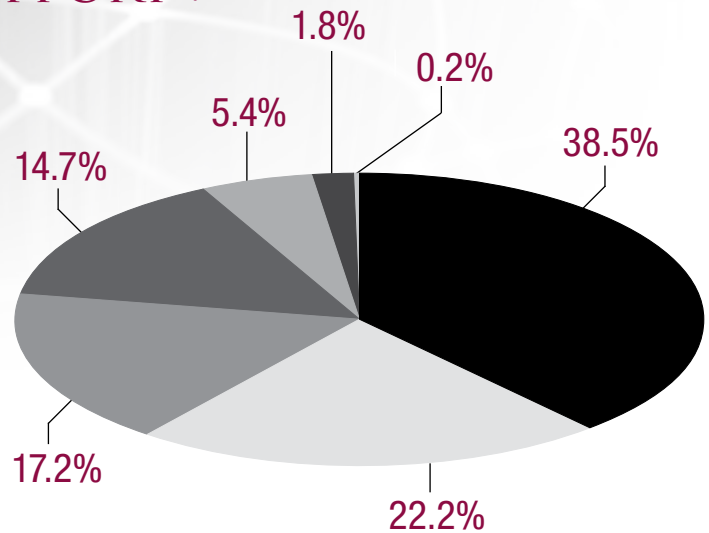
The many achievements of BRI over the past 100 years were recognized through resolutions and accolades from officials in city, county, state and federal government, as well as inclusion in the Congressional Record. BRI also received the Jennifer B. Langston Community Service Award (named for the emerita BRI Board member) from the Cleveland Area Chapter of the Alzheimer's Association and was recognized by the Junior League of Cleveland for the leadership opportunities provided to women over the past century through BRI's all-female Board.

# FINANCIALS 2008

## SOURCES OF PROGRAM SUPPORT\*:

\$13,380,000

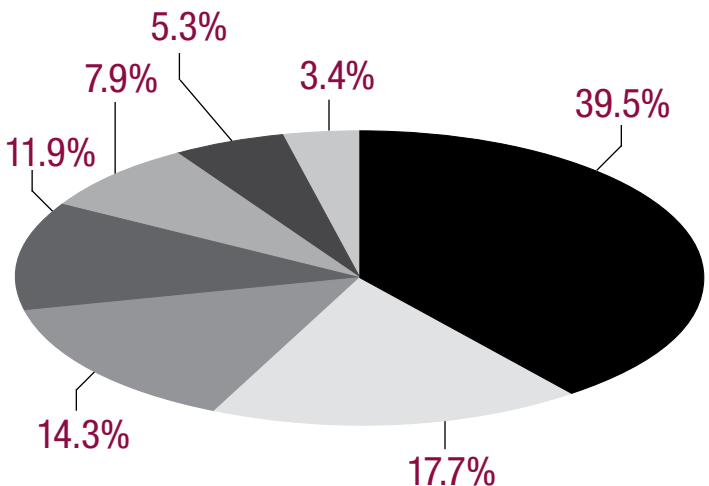
Income from Trusts.....	38.5%
Eldercare Services Institute, LLC Fees.....	22.2%
Contributions and Grants.....	17.2%
Benjamin Rose Property, LLC Income.....	14.7%
Interest and Dividends.....	5.4%
Margaret Wagner Apartments.....	1.8%
Other Income.....	0.2%



## COSTS OF PROGRAM SERVICES:

\$12,532,000

Eldercare Services Institute, LLC.....	39.5%
Administration and Support.....	17.7%
Benjamin Rose Property, LLC.....	14.3%
Margaret Blenkner Research Institute.....	11.9%
Katz Policy Institute.....	7.9%
Fund Raising and Marketing.....	5.3%
Margaret Wagner Apartments.....	3.4%



\* Revenue from sale of assets, gains on investments, and gains from discontinued operations are not included.

Audited financial statements by Howard, Wershbale & Co. are located in the Benjamin Rose Institute Finance Office.

# 100th Anniversary Gala

More than 250 guests joined us for our Centennial Gala Celebration at the Union Club on October 25. Thanks to the success of the evening's silent and live auctions, as well as generous support of our sponsors, we raised more than \$114,000 in support of the Katz Policy Institute. Guests were among the first to receive a copy of *The Benjamin Rose Institute: The First 100 Years*, a commemorative history book written by local writer Eileen Beal, and a companion piece about BRI Distinguished Scholar Dr. Sidney Katz. The gala was recognized by the publication *Currents* as one of the best events of 2008.



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*Special thanks to these individuals and organizations who contributed items to our live and silent auctions. We appreciate your support!*

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Event chair and BRI Board Member Betsy Stueber places a bid during the live auction.

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BRI President and CEO Richard Browdie raises a toast to BRI's 100th anniversary.



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Ms. Patricia A. Walter

### **Bose A. Watkins**

Ms. Brenda Watkins

*We have made every effort to ensure the accuracy of this list. If you have any corrections, please call our Institutional Advancement Office at 216.373.1607.*



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Cyrilene Avery  
Ida Bell  
Mary Bland  
Ruth Bragg  
Gale Brown  
Ollie Bryant  
Shirley Cockrell  
Katie Cork  
Sharon Cross  
Maxine Davis  
Ludel Dennis  
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Annie Eutsey  
Muriel Fox-Haralson  
Vinetta Franklin  
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Barbara Galbraith  
Ida Goodwin  
Margaret Gordon  
Patricia Green  
June Greenlee  
Johnnie Mae Hall  
Mary Hall  
Mary Harris  
Peggy Hayes  
Mildred Henderson

Grace Hogans  
Lizzie Howell  
Lucille Hunter  
Mary Ivy  
Hattie Jackson  
Shirley James  
Jerelene Johnson  
Willie Johnson  
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Carrie Jones  
Dorothy Jones  
Mary Jones  
Marian Key  
Rafail Kleshchevskiy  
Freddie Lawrence  
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Rose Mack  
Ola Mitchell  
Marva Miller  
Mattie Moody  
Harold Moore  
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JoAnn Walker  
Rosie Weatherspoon  
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Laurel Lawrence  
Jeff Lucas  
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Aakanksha Marwah  
Brittane Watkins

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Alzheimer's Association  
The Cleveland Foundation  
Cleveland State University  
Cuyahoga Community College  
The Edwin T. and  
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The Norma Witt Jackson Fund  
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Miami University, Scripps  
Gerontology Center  
National Institute on Aging  
National Institute on Mental Health  
Ohio Department of Aging  
Pennsylvania State University  
The Retirement Research  
Foundation  
The Robert Wood Johnson  
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U.S. Department of Health and  
Human Services:  
\* Administration on Aging  
\* Centers for Medicare &  
Medicaid Services  
\* Substance Abuse & Mental Health  
Services Administration  
U.S. Department of Veterans Affairs  
Western Reserve Area  
Agency on Aging

## ELDERCARE SERVICES

Alzheimer's Respite Program  
Benjamin Rose Trust Funds  
Child and Adult Care Food  
Programs, State of Ohio  
Client Fees  
Concordia Care

Corporation for National  
and Community Service  
Cuyahoga County Board of Mental  
Retardation/Developmental  
Disabilities  
Cuyahoga County Community  
Mental Health Board  
Cuyahoga County Options  
for Elders  
Gifts and Donations  
In-Kind Donations  
Medicaid  
Medicare  
Ohio Department of Aging  
Older Americans Act  
The Plain Dealer Holiday  
Spirit Campaign  
U.S. Department of Veterans Affairs  
Western Reserve Area  
Agency on Aging (PASSPORT)

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Tenant Fees  
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**Members of the 1908 Legacy Society have included the Benjamin Rose Institute in their estate plans or established endowment funds. These donors share a belief in the value of our mission and services and wish to support them for future generations. If you have questions about becoming a Legacy Society member, or you have made provisions for the Benjamin Rose Institute in your estate plans but do not see your name listed, contact Kerry Mink at 216.373.1607.**

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WTAM radio personality Bill Wills was master of ceremonies for the 100th Anniversary Gala.



Dr. Sidney Katz (left) with wife, Beverly Katz, and speaker Dr. Andrew Achenbaum of the University of Houston at the 2008 Katz Policy Lecture.

# MANAGEMENT STAFF

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Rosalind Mitchell  
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*Director, Adult Day and Partial Hospitalization Programs*





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