



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY



DEAR FRIENDS AND SUPPORTERS,

On the whole, we have survived the recent recession in good shape. At a time when many nonprofits have struggled, we have been able to pursue our mission. And, while there are no doubt difficult times ahead of us, along with most others who serve frail and low-income older adults, we are, because of the hard work of our staff and with guidance from our committed board, well prepared to face them and be successful into the future.

We have Benjamin Rose himself to thank for that along with other donors and major benefactors over the years who have remembered us in their estates. On page 9 of this report, you'll find the story of Margaret Barnes and Dr. Adam Denison, who left us \$1.8 million and \$192,000, respectively, on their passing in 2010. Both gifts were made in recognition of the excellent care their relatives received as clients of the Benjamin Rose Institute on Aging. Such legacy gifts allow the organization to continue to innovate, to provide high-quality service to older adults regardless of income, and to continue our mission into the foreseeable future.

Such generosity also reminds us of the value of the work we do at Benjamin Rose.

We will continue to:

- Develop new evidence-based services, interventions and programs to assist older adults and their caregivers
- Share our knowledge and best practices with others through continuing education, scholarly publications and conference presentations
- Explore opportunities for and develop partnerships with like-minded organizations
- Offer exceptional housing for low-income seniors
- Work with legislators and other public policy makers to ensure that the unique needs of the ever-growing older population and adults with disabilities are met

We hope we can count on your continued support and engagement in these challenging times to come.



Richard Browdie
President/CEO



Emily A. Drake
Chairperson, Board of Directors

OUR MISSION

To advance the health, independence,
and dignity of older adults.

YEAR IN REVIEW

ELDERCARE BY THE NUMBERS

The Eldercare Services Institute (ESI) of Benjamin Rose continued to provide high quality service and assistance to older adults and their caregivers throughout 2010. The majority of clients were women (74%); and about half were African American (46%) or Caucasian (45%).

The Social Work Department provided 2,475 services/visits for case management, counseling and other social services to 349 clients. The Mental Health Program provided 9,571 hours of service to 463 adults aged 55 and older who are living with mental illness or addiction. ESI Home Care provided 64,653 visits for skilled nursing, personal care and other home-based services to 479 clients. The Adult Day Program served 93 clients with a total of 5,785 units/days of service. The Partial Hospitalization Program (East and West) served 39 clients with a total of 3,387 units/days of service.

Seventy-nine volunteers in the Senior Companion Program provided 38,423 service hours to more than 60 clients in 2010.



Dr. Georgia Anetzberger (right), President, National Committee for the Prevention of Elder Abuse, addresses a question during a panel discussion on elder justice in Ohio, prior to the 2010 Katz Policy Lecture. Other panelists: Carol Dayton, (left), Chair, Ohio Coalition for Adult Protective Services Steering Committee, and Trumbull County Probate Judge Thomas A. Swift, JD.

PROGRAM MILESTONE

The Partial Hospitalization Program celebrated its first anniversary on Cleveland's west side at the Senior Health and Wellness Center in 2010. The program offers intensive group therapy for adults age 55 and older with mental illness.



Former Ohio Secretary of State Jennifer Brunner (second from right) was among policy makers who visited Benjamin Rose in 2010.

FIRE SAFETY TRAINING

Social worker and community health educator Bonnie Paul received a grant with the City of East Cleveland to take part in the program *Remembering When: Fire and Fall Prevention Program for Older Adults*. The scholarship grant was provided by the National Fire Protection Association, NFPA, High-Risk Outreach Programs of the Public Education Division. Ms. Paul traveled to Boston in November 2010 for an intensive two-day training session on program materials and effective implementation in the community.

HOARDING CONNECTION

The Benjamin Rose Institute on Aging and the Cuyahoga County Board of Alcohol, Drug Addiction and Mental Health Services (ADAMHS) are leading a countywide effort to tackle issues of hoarding. The Hoarding Connection of Cuyahoga County will provide support and advice, education, best practices, and assistance in identifying needed resources for individuals who hoard and those who work with individuals who hoard. Staff from Benjamin Rose's Mental Health Program, Margaret Blenkner Research Institute and Institutional Advancement at Benjamin Rose meet regularly with representatives from ADAMHS, other service agencies, public health and public safety officials, local departments of aging, professional organizers, and others.

HELPING SENIORS ACCESS THEIR BENEFITS

The Benjamin Rose Institute on Aging's Medicare and Benefits Enrollment Call Center helps older adults understand and access benefits for which they may be eligible. In 2010, the Call Center educated 2,867 beneficiaries and those who care for them about federal, state and local benefits including the Medicare Prescription Drug Program. The center provided one-on-one counseling sessions for 1,307 individuals with hundreds being assisted with resolving issues with their Medicare Part D plans. Benefit screenings were provided to 333 individuals and 298 applications were submitted for benefits. Older adults, like many Ohioans, are continuing to struggle with harsh economic conditions, and this was reflected in the number of people who contacted the Call Center for assistance. This trend is expected to continue in 2011 with the goal of improving the health and economic security of all older adults.

THE MARGARET BLENKNER RESEARCH INSTITUTE (MBRI)

Over the years, the Margaret Blenkner Research Institute (MBRI) has made extensive contributions to gerontology and aging services through its program of applied research, scientific publications, national and local presentations (*photo, center*), and a wide variety of supportive professional activities making MBRI a nationally and internationally known leader in the field. MBRI's interdisciplinary staff conducted 12 funded research projects in 2010, involving more than 2,000 older adults, caregivers and service providers. Also in 2010, they published 23 scientific articles on MBRI research findings; gave 54 presentations to a wide variety of audiences; mentored students and maintained formal affiliations with various universities across Ohio; received three special awards; and served the field through participation in scientific review committees, editorial boards, and many professional associations.

A major initiative for MBRI in 2010 was increasing the number of evidence-based programs, that is, interventions or services developed, tested and proved by research to achieve the intended beneficial outcomes. Eight funded research projects involved evidence-based programs and this focus will continue in the coming years. MBRI also played a leadership role in advancing knowledge about evidence-based programs in gerontology by leading the publication of the special, spring 2010 edition of the journal *Generations*. MBRI's focus on developing and testing evidence-based programs is fundamental to its mission of translating research findings into useful programs for older adults, families and service providers.



MBRI FUNDED PROJECTS FOR 2010

Georgia Replication of Care Consultation

Tests the effectiveness of BRI Care Consultation as a complementary service offered by three Area Agencies on Aging in Georgia.
Funded by Administration on Aging

Evaluation of Early Stage Programs

An evaluation of social and recreational programs offered by the Northwest Ohio Chapter of the Alzheimer's Association to families.
Funded by The Sherwick Fund, Toledo Foundation, United Way

Rewarding Education through Advanced Careers in Healthcare (REACH) Project

An evaluation of an intervention to enhance training, career ladders, and job satisfaction, and reduce job turnover of staff in long-term-care settings.
Funded by 10 local foundations

Partners in Dementia Care for Veterans with Dementia and Their Family Caregivers

A controlled trial of the effectiveness of care coordination to improve outcomes for veterans with dementia and their family caregivers.
Funded by Department of Veterans Affairs, Health Services Research

Alzheimer's Association Chapters and Partners in Dementia Care

A controlled trial testing the effectiveness of care coordination delivered via a partnership between Alzheimer's Association chapters and VA medical centers.
Funded by Alzheimer's Association

Tennessee Replication of Care Consultation

Tests the effectiveness of BRI Care Consultation delivered by Eastern Tennessee Chapter Alzheimer's Association to Humana health plan members.
Funded by Administration on Aging

Early-stage Partners in Care: The EPIC Project

Examines the feasibility of adapting an early-stage dementia counseling program for use in support groups with family caregivers and persons with dementia.
Funded by Administration on Aging

Empowering Elders by Enhancing Cognitive Health Outcomes: The ECHO Program

Tests the impact of counseling techniques and computer-based brain fitness exercises to help individuals with memory loss and their family caregivers stay mentally active, and improve their communication and well-being.
Funded by Administration on Aging

Supporting Health Activities Resources and Education (SHARE)

Assists families facing the challenges of memory loss by increasing knowledge of dementia and services, improving communication skills and well-being, and the understanding of care values and preferences.
Funded by Administration on Aging

Benjamin Rose Institute on Aging Care Consultation Program

Refines BRI Care Consultation and investigates how organizational and community characteristics influence the feasibility of implementing this evidence-based program in the local Cleveland community.
Funded by Rosalynn Carter Institute for Caregiving/Johnson & Johnson

Reducing Disability in Alzheimer's Disease in Ohio

A replication study of an evidence-based program delivered by Alzheimer's Association Chapters in Ohio that teaches exercises to older adults with dementia and techniques of care to their family caregivers. (*photo, left*)
Funded by Administration on Aging

Home Health Care CAHPS Survey

Administering the federally mandated consumer satisfaction surveys for adults using Medicare and Medicaid home health services.
Funded by contracts with home health agencies



John Begala, executive director of the Center for Community Solutions, addresses more than 100 guests at the 2010 annual meeting.

COUNTY DATA CONSORTIUM

In 2010, the Benjamin Rose Institute on Aging and a range of service organizations got together to address an all-too-common issue in delivery of care and services to older adults and individuals with disabilities. Coordination of care can be hindered by the lack of an established, integrated information infrastructure that allows organizations to track clients over time and across provider organizations to ensure that shared clients are receiving the most appropriate and complete care. The work of the project team over a 12-month period

represents the first time that the leadership of aging services in Cuyahoga County has convened to focus attention on how a data consortium and an integrated data system can improve planning, service delivery and research for services to older adults and adults with disabilities. Similar models have met with success elsewhere in the United States. The complete report is available at www.benrose.org/KPI/Data_Consortium.cfm

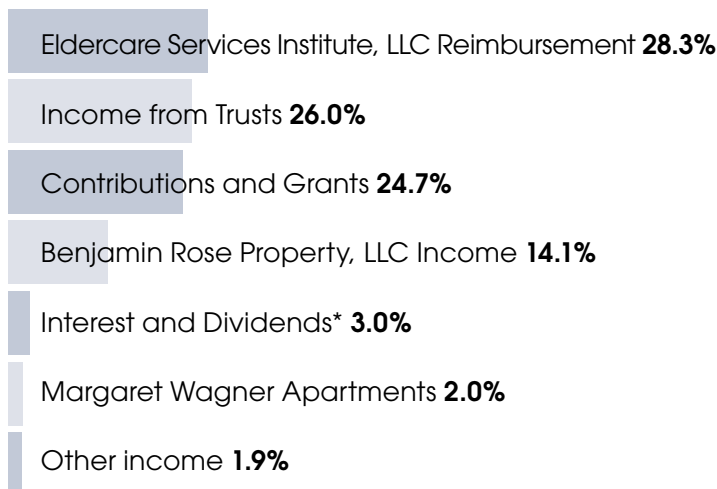
WHAT THE EXPERTS SAY

Under its Cooperative Agreement with the Administration on Aging (AoA), the Katz Policy Institute (KPI) of Benjamin Rose brought together a national panel of experts on strengthening the long-term-care workforce, specifically direct-care workers and family caregivers. Eleven panel members, selected in consultation with AoA staff, attended meetings in March and April 2010, with staff from KPI and AoA and/or submitted written recommendations. The panel's work was organized to address five areas of concern: the supply of direct care workers and family caregivers, the retention of these helpers, the readiness or capacity of these helpers to provide care, the quality of care they provide in terms of outcomes for those in their care, and the impact of recent health care reform legislation. A summary of the panel's recommendations is available online at www.benrose.org/KPI/KPIProjectsPanel.cfm.

FINANCIALS 2010

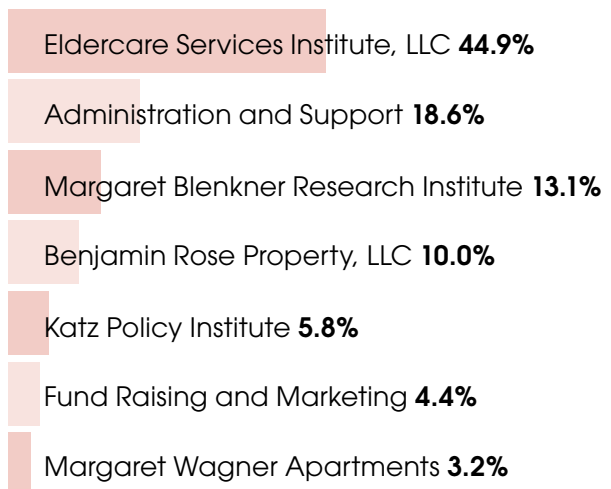
SOURCES OF PROGRAM SUPPORT*

\$12,974,000



COSTS OF PROGRAM SERVICES

\$12,053,000



* Revenue from sale of assets and gains on investments are not included.

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

DONORS

MAJOR DONORS

\$10,000+

Estate of Mrs. Margaret C. Barnes
The Helen C. Cole Charitable Trust
Estate of Dr. Adam Benjamin
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The Hankins Foundation

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\$1,000 – \$9,999

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President & CEO Richard Browdie presents a commemorative award to Emerita Board Member Betty Rose in recognition of her special gift establishing the Innovation in Caregiving Award.

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SUPPORTER

\$125 – \$249

Mr. & Mrs. Patterson Barnes
Mr. Edward M. Beesley

INNOVATION IN CAREGIVING AWARD

The Innovation in Caregiving Award, created in 2010, will celebrate the creativity of caregivers.

The award is made possible by a gift from Benjamin Rose Emerita Board Member Elizabeth Hitchcock (Betty) Rose, who realized that caregivers are often creative problem solvers. She intended this award to celebrate the accomplishments of these individuals who serve on the frontlines of caregiving.

Up to three award winners will receive a commemorative plaque and a check for \$1,000.

The Innovation in Caregiving Award recognizes adults who, in the course of caring for an adult aged 60 or over in a private home or a residential setting: invent a device or technique that solves a caregiving challenge, or find a new application for an existing device or technique that supports caregiving and eases the burden on caregivers.

The first awards will be presented at the Aging Your Way Conference in November 2, 2011.

Application deadline is June 30, 2011. For information and to apply online, visit www.benrose.org/InnovationAward/Info.cfm



2010 Board Chairperson Emily Drake with Emerita Board Member Betty Rose.

Mr. & Mrs. James A. Saks
 Mr. Jerrold T. Stewart
 Mr. & Mrs. Frederick Tavill

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UP TO \$124

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 Ms. Elizabeth Anderson
 Ms. Katherine Virginia Ashley
 Ms. Ann Austin
 Dr. Lester A. Ballard, Jr.
 Ms. Cynthia Bassett
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 Mr. & Mrs. Ed Bixenstine
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 Mr. & Mrs. Raymond C. Kogan
 Mr. & Mrs. Ronald D. Kohut
 Ms. Margaret Kollus
 Ms. Barbara Kostanick
 Mrs. Terry Kovel



Gail Hunt, President & CEO of the National Alliance for Caregiving, presents the keynote address, What's Next? Looking Ahead to the Next 10 Years in Family Caregiving, at the 2010 Aging Your Way Conference in November.

Mrs. Mina Kulber
 Mr. Mark Kunik
 Dr. & Mrs. Robert S. Kunkel
 Dr. C. Seth Landefeld
 Ms. Belle Likover
 Mr. & Mrs. George P. Loomis
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 Ms. Judith Yesso
 Mr. & Mrs. Kenneth A. Zeisler

MATCHING GIFT

COMPANIES

Thank you to the following organizations for their generosity in matching employee gifts to the Benjamin Rose Institute on Aging

Key Foundation
 GE Foundation



2010 Katz Policy Lecturer Bob Blancato (right), President of Matz, Blancato & Associates and National Coordinator of the Elder Justice Coalition, with Benjamin Rose Distinguished Scholar Dr. Sidney Katz.

SPECIAL GIFTS

**IN HONOR OF
Nancy Adams**
Ms. Norma Messing

Dr. David Bass
Ms. Wendy Looman

Raymond V. Bradley
Mrs. Mary Bradley

Abraham Brickner
Ms. Shelly Brodsky &
Mr. Gregg Kepes

Semanthie Brooks
Ms. Belle Likover

Polly Clemo
Mr. & Mrs. Douglas Knoop

Sharen Eckert
Mrs. Lee M. Fisher
Ms. Wendy Looman

Lee M. Fisher
Mrs. Alma G. Miller
Mr. & Mrs. Frederick Tavill

Dr. Giesele Greene
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Cleveland

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Dr. C. Seth Landefeld

Laura Kulber
Mrs. Mina Kulber

Cathy LoPresti
Ms. Ann Austin

**Margaret Blenkner Research
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Dr. David Bass

Senior Companion Program Staff
Mrs. Lynda Owens

Astrid Weizman
Mr. & Mrs. Raymond Kogan

Betty & Jim Whitlatch
Dr. Carol Whitlatch

**IN MEMORY OF
Laura Katz Bleiweiss**
Mr. Jason C. Bleiweiss

Alona G. Christensen
Mr. and Mrs. Dan Sullivan

Walter & Irene Dresher
Mr. Robert W. Dresher

Col. Edward Dziedzicki
Mr. & Mrs. Frank Cardinale

Nancy Esker
Ms. Catherine McCarthy

Max Finkelstein
Ms. Phyllis Seltzer

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Anne Buckley Ott-Hansen
Miss Joan Karnosh

Shardaben Pattani
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Shirley Reiter
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Ms. Shirley Goodman

Joseph Smith
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Carey Sutton
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Mr. Mark Kunik
Mr. & Mrs. Steve Marks
Dr. Linda Noelker
Mr. Donald Sayre &
Ms. Nancy Wurzel
Mr. Robert Shapiro
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Mr. Larry Weinberg
Ms. Nancy Wilson
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Liesbeth Taschner
Ms. Marlene McClain

Emma Vodila
Mr. Ron Salvatore

Joseph Walkush
Mr. & Mrs. Frank Cardinale

Clyde M. & Helen K. Walter
Ms. Patricia Walter

GIFTS IN-KIND

Academy Graphic
Communication Inc.
Mrs. Anne Davalla
Dewey's Coffee Café
Family of Edward Dziedzicki
Mrs. Kathleen Gallagher
Mrs. Pat Ventura
Western Reserve Restaurant
Management (Wendy's)



ADP Activity Specialist Geneva Forte (second from right) was featured in the Fox 8 segment "Pay It Forward" with host Wayne Dawson (second from left) in 2010.

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.

1908 LEGACY SOCIETY

Members of the 1908 Legacy Society have included the Benjamin Rose Institute on Aging 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 if you have made provision for the Benjamin Rose Institute on Aging in your estate plans but do not see your name listed, please contact Kerry Mink Wray at 216.373.1607 or kmink@benrose.org. We would like to honor your commitment and dedication to Benjamin Rose. All Legacy Society members are invited to special events throughout the year.

Anonymous (5)

Margaret Barnes*

Aloise O. Bates

Polly Clemo

Phyllis J. Colarusso*

Helen C. Cole*

Lois H. Cole

Mary French Conway

Adam Benjamin Denison, MD*

Barbara Denison*

Dale* & Dorothy Dettmer*

Emily Ann Drake

Mary & Oliver Emerson

Ruth B. Fiordalis

Barbara and Peter Galvin

Catherine R. Gerbic

Thomas J. & Judith Fay Gruber

David and Robin Gunning

Sarah Ott-Hansen

Kathryn & Jim Kaesberg

Alice J. Kethley, PhD

Linda S. Noelker, PhD, & Raymond Jason

Barbara S. (Buster) Oldenburg

Henry Ott-Hansen

Edward H. Richard

Linda Richard

Elizabeth H. Rose

Dale M. Rothenberger

Faye M. Shapero*

Susan & Jackson G. Simpson

Marcia J. Wexberg

Dorothy M. Young*

*deceased

Italics: became Legacy Society member in 2010

Bold: planned gift realized in 2010

STRENGTHENING OUR LEGACY

The Benjamin Rose Institute on Aging received a \$1.8 million legacy gift in 2010 from the Estate of Margaret Barnes. In the Institute's history, the gift is second only to the initial bequest from industrialist Benjamin Rose that established the organization.

The mother of Mrs. Barnes was a resident of Margaret Wagner House in the mid-1980s.

"This astounding gift speaks well of the Benjamin Rose Institute on Aging," notes Polly Clemo, Vice President of Institutional Advancement. "Mrs. Barnes was happy with the care her mother received in our nursing home, and she clearly recognized that we continue to provide exceptional care in people's homes and in the community."

Another generous planned gift in the amount of \$192,000 was received from the estate of Dr. Adam Benjamin Denison Jr. Dr. Denison's sister had been a resident of Kethley House.

If you have made provisions for Benjamin Rose in your estate plans, please call 216.373.1607. We would like to recognize you as a member of the 1908 Legacy Society.



Mayoral aide Valerie McCall (right) presents a proclamation from Cleveland Mayor Frank Jackson to Linda Magee (left) in recognition of her 40 years as a nurse aide with Benjamin Rose.

VOLUNTEERS

SENIOR COMPANIONS

Joyce Adams
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Ida Bell
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Gwendolyn Blakenly
Mary Bland
Gayle Brown
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Catherine Vinson
Gloria Walker
Rosie Weatherspoon
Joyce Williams
Lillian Williams
Obedella Williams
Larry Woods

ADULT DAY PROGRAM

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JoAnn Ray
Hugh Morgan
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Everton Sommers

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Sara Fields
Heather Lawrence
Shameka McBride

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The Norma Witt Jackson Fund
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Johnson & Johnson/Rosalyn Carter
Institute Caregivers Program,
Georgia Southwestern State
University
Ohio Department of Aging
State of Tennessee/Tennessee
Commission on Aging & Disability
Towards Employment, Inc.

U.S. Department of Health and
Human Services:
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* 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

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Alcohol, Drug Addiction and Mental
Health Services Board of
Cuyahoga County
Alzheimer's Respite Program
Benjamin Rose Trust Funds

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Programs, State of Ohio
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Corporation for National
and Community Service
Cuyahoga County Board of
Developmental Disabilities
Cuyahoga County Options
for Elders
Gifts and Donations
Humana
In-Kind Donations
McGregor
Medicaid
Medicare
Ohio Department of Aging
Older Americans Act
United Healthcare
U.S. Department of Veterans Affairs

Western Reserve Area
Agency on Aging (PASSPORT)

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APARTMENTS

Tenant Fees
U.S. Department of Housing and
Urban Development

OTHER

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Jewish Community Federation
United Way of Greater Cleveland
United Way of Greater Toledo

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Heather L. Menne, PhD
Research Scientist

Carol J. Whitlatch, PhD
Research Scientist II and Assistant Director

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BOULEVARD LOCATION

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Cleveland Heights, OH 44106-2797
216.373.2015

Rosalind Mitchell
Housing Manager

ADULT DAY PROGRAM/ PARTIAL HOSPITALIZATION PROGRAM

EAST
2373 Euclid Heights Blvd.
Cleveland Heights, OH 44106-2797
216.791.8000

WEST

Senior Health & Wellness Center
4229 Pearl Road, Suite 021
Cleveland, OH 44109
216.957.3541

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