



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY

BUILDING FOR THE FUTURE
2012 ANNUAL REPORT

DEAR FRIENDS,

For the Benjamin Rose Institute on Aging, the year 2012 was one of opportunity and growth. Many changes occurred at BRIA, some by choice and some thrust upon us.

With continuing national debate about the reauthorization of the Older Americans Act and the implementation of the Affordable Care Act, along with the Integrated Care Delivery System in Ohio, the mechanisms for delivering care to seniors are in flux. We will continue to monitor developments and advocate with lawmakers to do what is right for older adults and their families. We will also continue to help minimize the negative impact of anticipated policy changes on seniors and their families.

BRIA has been a leader and generous collaborator for decades, and we intend to continue and expand upon our 104-year legacy. At the same time, we must constantly evolve in the ever-changing health care and social service environment to remain effective for our consumers and to be relevant, competitive and sustainable as an organization for the long term. Toward that end, BRIA staff and the Board of Directors spent a large part of 2012 in the development of an ambitious strategic plan "Building for the Future" 2013-2015. The plan challenges us to improve on our commitment to deliver high-quality services, increase our advocacy efforts, establish means to train and educate service providers, and diversify our resources to enable sustainability and continued growth.

Our work will be inspired by and accomplished within our beautiful new headquarters at the corner of Martin Luther King Boulevard and Fairhill Road. Since breaking ground in March 2012, the project is complete and our next step is continuing to strive to fulfill our mission. This new facility includes a conference center that offers us the opportunity to expand the scope of our education and training programs. In addition to our traditional audience of social workers and other health service professionals, we will be offering continuing education

opportunities to attorneys, financial planners and others who work with older adults in a variety of capacities. Community organizations and businesses have also begun to use the space for their functions and enjoy the state-of-the-art facility with signature views of downtown Cleveland.

We welcome your support during this exciting period of growth and opportunity. Continued philanthropic investment helps our dollars to go further, enabling the endowment to support mission-critical work and freeing up funds to pursue innovation in services, research, advocacy and curriculum development.

Thank you for your past support of the Benjamin Rose Institute on Aging, as it has helped us achieve our current success. Your continued involvement propels us to our exciting future. If you have not already visited our new headquarters at 11890 Fairhill Road, we invite you to come share in our vision.



Richard Browdie

Richard Browdie
President/CEO



Kathryn L. Kaesberg

Kathryn L. Kaesberg
2012 Chairperson, Board of Directors

2012 YEAR IN REVIEW

ELDERCARE BY THE NUMBERS

The Eldercare Services Institute (ESI) of the Benjamin Rose Institute on Aging (BRIA) continued to provide high quality service and assistance to older adults and their caregivers throughout 2012. The majority of clients were women (67.5%); and the majority were Caucasian (48.7%) or African American (43.2%).

The Social Work Department provided case management, counseling and other social services to 220 clients. The Mental Health Program provided service to 360 adults aged 55 and older who are living with mental illness or addiction. ESI Home Care provided skilled nursing, or personal care and/or other home-based services to 325 clients. The Adult Day Program served 61 clients with therapeutic and social activities. The Partial Hospitalization Program (East and West) provided group therapeutic activities for 47 clients aged 55 and older who are living with mental illness.

Seventy-seven volunteers in the Senior Companion Program provided 31,995 service hours in 2012.

NATIONAL LEADERSHIP IN AGING PROGRAM

Lynda Owens, Administrator of the Senior Companion Program, was selected as a member of the 2012-2013 New Ventures in Leadership program of the American Society on Aging (ASA). Owens joined a class of agency and community leaders from across the nation in ASA's leadership program for persons of color working in the field of aging.

New Ventures in Leadership is a rigorous one-year leadership development program that supports participants in successfully completing a replicable special project related to eldercare and to advance to higher leadership levels, ultimately making each partner a more effective leader within their organization and community.

Owens' project was titled "Elder Abuse of Homebound Elderly." Since participating in the program, she has educated Senior Companions about elder abuse, neglect and exploitation. Her participation in the program was supported by The Cleveland Foundation.



BRIA Board Member Patricia Fruitg joins residents Mary Little and Lydia Jenkins for the Margaret Wagner Apartment II ribbon cutting in May 2012. Little and Jenkins gave guests tours of their new apartment homes.

NEW APARTMENTS AT MARGARET WAGNER HOUSE

In May 2012, BRIA unveiled 36 newly renovated one-bedroom apartments for low-income seniors at Margaret Wagner House.

The project was an adaptive reuse of the second and third floors of BRIA's former nursing home into HUD 202 Supportive Housing for Seniors apartments. Including apartments on the fourth and fifth floors of Margaret Wagner House, the building can now house 60 senior residents.

The new units feature individual heating and air-conditioning controls, accessible bathrooms with showers and energy efficient windows with low-e, argon-filled insulated glazing. Suite kitchens feature high-quality wood cabinets with senior-friendly features like pull-out tray shelves, lazy susans inside corner cabinets and dining counters set at the proper height for wheelchair access. Suite entrances are recessed off the main corridor to allow for personalization as well as a small parcel shelf next to each entry door.

Each floor has its own Laundry Room and Resident Storage Room with individual, accessible lockers. Residents of the new apartments have access to an existing Community Room on the 4th floor that will have a new, large sliding door installed to allow it to open directly into the adjacent Computer Room for extra seating space to accommodate the additional residents.



From left: Robert Blancato, National Coordinator of the Elder Justice Coalition, Hubert "Skip" Humphrey III, Assistant Director, Consumer Financial Protection Bureau, BRIA President and CEO Richard Browdie, and Robert Patton, Assistant U.S. Attorney at the July 25 forum.

FINANCIAL PROTECTION FOR OLDER ADULTS

A seminar titled "Financial Protection for Older Adults: Understanding the Challenges and Promoting Informed Decisions" was held July 25, 2012 for trust attorneys, social workers, care takers, and other professionals who work with older adults. Hosted by BRIA and sponsored by KeyBank, the event included breakout sessions on economic security, financial scams and empowerment programs for seniors.

Keynote speaker Hubert "Skip" Humphrey III, Assistant Director for the newly created Consumer Financial Protection Bureau's Office for Financial Protection of Older Adults, discussed the steps his office is taking to address the growing trend of financial exploitation of seniors. According to recent studies, seniors lost at least \$2.9 billion to financial exploitation in 2010 and there was a 12% increase in the amount of money scammed from seniors from 2008 to 2010.

Participants were encouraged to share their stories with Humphrey's office to help shape the national agenda on financial exploitation.

ACCREDITATION OF MENTAL HEALTH PROGRAMS

The Eldercare Services Institute of BRIA received its third three-year accreditation in July 2012 from CARF International (formerly the Commission on Accreditation of Rehabilitation Facilities). This accreditation is effective through July 2015. The programs receiving the accreditation are Mental Health Case Management, Day Treatment (Partial Hospitalization Program) and Outpatient Treatment (Social Work Counseling).

CARF accreditation is a demonstration of superior performance for our clients and assurance that the Institute meets clearly defined and internationally accepted standards of service excellence.

BRIA RECEIVES DIGNITARIES FROM SLOVAKIA

BRIA President & CEO Richard Browdie met with Milan Ftacnik, the mayor of Bratislava, Slovakia and US Ambassador Theodore Sedgwick to discuss issues of aging in June 2012.

The visitors were given a tour of the Margaret Wagner House, which comprises the Margaret Wagner Apartments for low-income seniors, the Adult Day and Partial Hospitalization Programs, and the McGregor PACE (Program of All-Inclusive Care for the Elderly) program. Browdie provided an overview of the service, research and advocacy work done by BRIA and how that fits into the larger Aging Network in the area and in the country.

Bratislava, Slovakia is Cleveland's sister city. This is the second time BRIA received guests from Slovakia. Twenty years ago, a group of social workers from Slovakia visited BRIA to learn more about BRIA's model of service to older adults.

TRUSTED ADVOCATES FOR SENIORS

As part of northeast Ohio's Aging and Disability Resource Network (ADRN), the BRIA Medicare and Benefits Enrollment Call Center provided training and education to more than 2,000 consumers, caregivers and professionals in 2012. The Center provided more than 900 telephone counseling sessions, completed 185 benefits check-ups and was successful in helping consumers gain more than \$146,000 dollars in benefits.

Throughout 2012, BRIA's executive leadership and the Katz Policy Institute (KPI) worked closely with advocacy groups across the state to educate consumers and providers about the implementation of Ohio's planned Integrated Care Delivery System to coordinate the long-term care and medical care needs of Medicare and Medicaid beneficiaries.

In addition, BRIA has been actively working with coalitions across the state to support Governor Kasich's proposal to expand Medicaid coverage.

RESEARCH ANNIVERSARY CONFERENCE

The Margaret Blenkner Research Institute celebrated its 50th anniversary with a special conference at the Bertram Inn and Conference Center in Aurora, Ohio on Friday, November 9, 2012.

The conference, titled "Celebrating the Partnership of Research Practice, and Policy on Aging," highlighted evidence-based programs that help older adults and their families live healthier lives.

Internationally renowned speakers provided their perspectives on translating research into programs and policies that have the greatest impact on the aging population.

Speakers included:

- Robert Applebaum, PhD, Professor and Director, Ohio Long Term Care Project, Scripps Gerontology Center, Miami University
- Lynn Feinberg, MSW, Senior Strategic Policy Advisor at AARP Public Policy Institute
- Robyn Golden, LCSW, Director of Health and Aging at Rush University Medical Center
- Robert Hudson, PhD, Professor of Social Policy at Boston University
- Katie Maslow, Scholar-in-Residence at the Institute of Medicine
- Steven Zarit, PhD, Professor of Human Development and Head of the Department of Human Development and Family Studies at Penn State University



50TH ANNIVERSARY RESEARCH CONFERENCE (clockwise from left): Katie Maslow, Peter Whitehouse, Dale Dannefer and Harvey Sterns chat following Maslow's presentation; Robert Hudson delivers a tribute to the late Robert Binstock; Richard Browdie welcomes participants; David Bass discusses the history of MBRI.



MBRI RECEIVES NATIONAL RECOGNITION

The Margaret Blenkner Research Institute (MBRI) of Benjamin Rose received the 2012 Excellence in Research and Education Award from LeadingAge.

LeadingAge, an association of 6,000 not-for-profit organizations dedicated to making America a better place to grow old, recognized MBRI for excellence and outstanding leadership in conducting applied research. Findings of Benjamin Rose researchers have been widely used to improve the quality of life and care

of older adults, reduce caregiver burden and strain, coordinate care, and improve the health and well-being of countless older adults.

"By training and educating others in the U.S. and around the world, MBRI is making important contributions to expand the world of possibilities for aging," LeadingAge said in announcing the award.

The Excellence in Research and Education Award was presented at the LeadingAge Annual Meeting in Denver in October 2012.

2012 PROJECTS FROM THE MARGARET BLENKNER RESEARCH INSTITUTE

BRIA's research team conducts many multi-year projects. In the past year, the following projects were active:

Respite Program Evaluation: Alzheimer's Association, Miami Valley Chapter

Evaluates the impact of a Caregiver Respite Program intended to ease the burden of care for dementia caregivers.

Funded By: Alzheimer's Association, Miami Valley Chapter

Evaluation of Early Stage Dementia Programs: Alzheimer's Association, Northwest Ohio Chapter

Evaluates the impact of various social and recreational programs offered by the Northwest Ohio Chapter of the Alzheimer's Association.

Funded By: Toledo Foundation and Alzheimer's Association, Northwest Ohio Chapter

Care Consultation at Jewish Family Services of MetroWest New Jersey

Implements BRI Care Consultation for family caregivers in New Jersey who are clients of a family counseling agency.

Funded By: New Jersey Health Foundation

Developing Video Training and Electronic Applications for the SHARE Dyadic Intervention

Creates a video training curriculum and iPad application for professionals to implement the SHARE Program with older adults and caregivers dealing with early-stage dementia.

Funded By: National Institute on Aging

Early-stage Partners in Care: The EPIC Project

Tests the feasibility of adapting the SHARE program for use in support groups with family caregivers and persons with dementia.

Funded By: Administration on Aging

Elder Abuse Prevention Program

Trains primary care professionals who are part of the WellMed Medical Group to screen, refer, and prevent abuse and neglect among older patients.

Funded By: Administration on Aging

Direct Service Worker Turnover in Ohio

Examines job turnover among direct service workers in four human service industries in Ohio: nursing homes, home health agencies, mental health agencies, and assisted living facilities.

Funded By: Centers for Medicare and Medicaid Services

Georgia Replication of Care Consultation

Tests the effectiveness of BRI Care Consultation as a complementary service to the broad array of assistance offered by three Area Agencies on Aging in Georgia.

Funded By: Administration on Aging/Rosalynn Carter Institute for Caregiving

Home Health Aide Implementation of "Reducing Disability in Alzheimer's Disease" Program

Tests the viability of home health aides implementing an evidence-based program of exercise and behavior management for persons with dementia and their informal caregivers.

Funded By: Administration on Aging

Home Health Care CAHPS Survey

Administers the federally mandated consumer satisfaction survey for adults using Medicare and Medicaid home health services.

Funded By: Contracts with home health care agencies

Ohio Replication of Partners in Dementia Care

Tests the feasibility and effectiveness of implementing the "Partners in Dementia Care" care-coordination program to veterans with dementia and their caregivers in Ohio.

Funded By: Administration on Aging

Ohio's Statewide Expansion of the "Reducing Disability in Alzheimer's Disease" Program

Evaluates statewide implementation and sustainability of an evidence-based program of exercise and behavior management for persons with dementia and their informal caregivers.

Funded By: Administration on Aging

The SHARE Program for Early-Stage Dementia

Tests whether SHARE improves outcomes by increasing: knowledge of dementia and services, communication skills and well-being, and understandings of care values and preferences.

Funded By: Administration on Aging

Tennessee Replication of Care Consultation

Tests the effectiveness of BRI Care Consultation delivered by Alzheimer's Tennessee, Inc. to Humana Health Plan members with dementia and their family caregivers.

Funded By: Administration on Aging

TARGETING ELDER ABUSE IN TEXAS

The U.S. Department of Health and Human Services' Administration on Aging awarded a \$907,356 grant to the Texas Department of Family Protective Services, in partnership with BRIA, the WellMed Charitable Foundation, and the Elder Justice Coalition in Washington DC. It will be used to address elder abuse prevention and intervention at WellMed clinics in five Texas markets.

Thanks to the grant, more than 40,000 seniors will receive education about reducing their risk for elder abuse, and their family doctors will receive training on how to identify potential victims. The three-year grant will pay for the addition of two Adult Protective Service Specialists, who will train clinic staff -- including more than 120 physicians, nurse practitioners and physician assistants -- on risk factors for elder abuse and help develop screening and intervention protocols. The funds also will provide education materials to senior patients at the 47 WellMed primary care clinics in the Austin, Corpus Christi, El Paso, Lower Rio Grande Valley and San Antonio areas.

"We at the Benjamin Rose Institute on Aging are very pleased to be a part of this effort," said Richard Browdie, President and CEO. "BRIA was home to some of the

first studies on elder abuse published in the U.S. more than 50 years ago. As our population ages, the risk grows. Increasing awareness among professionals who have routine contact with elders is critical to success."

The Margaret Blenkner Research Institute of Benjamin Rose will conduct the local evaluation of the project and collaborate with the national evaluator.

HOARDING CONNECTION GRANT

The Mental Health Program of BRIA was instrumental in leading the Hoarding Connection to obtain a grant from the Alcohol, Drug Addiction and Mental Health Service Board of Cuyahoga County (ADAMHS). The \$21,500 grant, approved in November 2012, enabled the planning of a Spring 2013 conference, "Cutting Through the Clutter: Multidisciplinary Approaches to Hoarding," which attracted more than 200 participants. The grant also funded a hoarding awareness video that was unveiled at the conference and can be viewed on the BRIA YouTube channel: www.youtube.com/benjaminroseinst.

2012 INNOVATION IN CAREGIVING AWARDS

Three individuals received the Second Annual Innovation in Caregiving Award in 2012. Each winner was presented with a \$1,000 check and was recognized at the MBRI 50th Anniversary Conference in November.

The winners were selected by impartial experts in the field from among many high-quality, innovative entries. The winners are Beth Gregerson, Sandy Grow, and Mary Stoudenmire.

Beth Gregerson from Willoughby, OH designed an apron for people who use a cane or walker to transport items. Her "Handy Pack" device is based on a tool apron that has multiple pockets and is worn around the waist. Unlike a tool apron, it is lightweight and can be made using colorful materials to suit the wearer's personality.

Sandy Grow from Massillon, OH developed an adaptation to her husband's glasses and headset that would rest on top of his head, nonvisible to him. This adaptation allows her husband, who has frontal lobe dementia, to listen to music and see clearly while avoiding dangerous behavior that might cause choking.

Mary Stoudenmire from Warrensville Heights, OH created a coverlet to keep her sister, who uses a power wheelchair, warm and dry during winter weather. Made with water-repellent fleece-lined fabric, her "Better Lap Coverlet" is designed



2012 Innovation in Caregiving Award winners Sandy Grow (left), Mary Stoudenmire (pictured with her sister), and Beth Gregerson (pictured with her father).

to attach to the power chair's leg rest supports. It also includes pockets to keep hands warm.

The Innovation in Caregiving Award recognizes individuals who in the course of caring for an adult aged 60 or over in a private home or a residential setting invented a device or technique that solves a caregiving challenge or found a new use for an existing device or technology that supports caregiving and eases the burden on caregivers.

The Innovation in Caregiving Award is made possible through a gift to the Benjamin Rose Institute on Aging by former Board Member Elizabeth Hitchcock Rose.

BRIA BREAKS GROUND ON NEW HEADQUARTERS



The Institute celebrated its 104th year by breaking ground on the first dedicated headquarters in the organization's history. Site demolition began in March 2012 and construction began in April.

Herman Gibans Fodor, Inc. Architects designed the new 31,214-square-foot headquarters. Albert M. Higley Co. was the Construction Manager for the project.

The ground breaking followed the sale of Kethley House, BRIA's former nursing home, to Kindred Healthcare, which was finalized in April 2012.

Richard Browdie, BRIA President & CEO, noted "This sale will enable BRIA to build a home in Cleveland that supports our historic mission of developing and managing innovative long-term services and supports and conducting research that further improves our understanding of services for older people and the policies that make better services possible."

"We will also be able to expand our efforts to share what we learn and draw national experts to Cleveland," he added.





The headquarters was also designed to include a 6,041-square-foot Education & Training Center, allowing the Institute to expand its continuing education offerings and providing a new stream of revenue through space leasing.

During construction of the new headquarters, offices for staff in Administration, Margaret Blenkner Research Institute, and the Katz Policy Institute remained in Kethley House. Staff from Eldercare Services Institute moved to temporary offices on Shaker Boulevard.

"The investment in our new headquarters helps secure our future for our second century," noted Board Chairperson Kathy (Muffy) Kaesberg.



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2012 Senior Companion picnic at Horseshoe Lake in Shaker Heights.

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UP TO \$124

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Adult Day Program participant Anna Lark celebrated her 104th birthday with family and friends in 2012.

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BRIA Senior Vice President Linda S. Noelker, PhD (right) accepts a special recognition award on behalf of the organization from the National Nurse Assistant Association.

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Nancy Rowe
Dr. Ronald Bell &
Mrs. Diane L. Bell

Violet Spevack, Mythbuster
Mr. & Mrs. Brett Kaufman

Astrid Weizman's birthday
Mr. & Mrs. Raymond C. Kogan

IN MEMORY OF

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*We have made every effort
to ensure the accuracy of
the information presented in
this publication. If you have
any corrections, please call
the Development Office at
216.373.1608.*

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 our mission, services, and purpose. Their commitment to BRIA will enable us to continue to thrive for future generations.

If you have questions about becoming a Legacy Society member, or if you have made provisions for the Benjamin Rose Institute on Aging in your estate plans but do not see your name listed, please contact Anne-Marie Connors at 216.373.1608 or aconnors@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.

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*Miami Valley Chapter
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Senior Service America, Inc.
State of Tennessee/Tennessee
Commission on Aging & Disability
Towards Employment, Inc.
U.S. Department of Health and
Human Services:
* Administration on Aging
* Centers for Medicare &
Medicaid Services
U.S. Department of Veterans Affairs
Western Reserve Area Agency on Aging

OTHER SOURCES

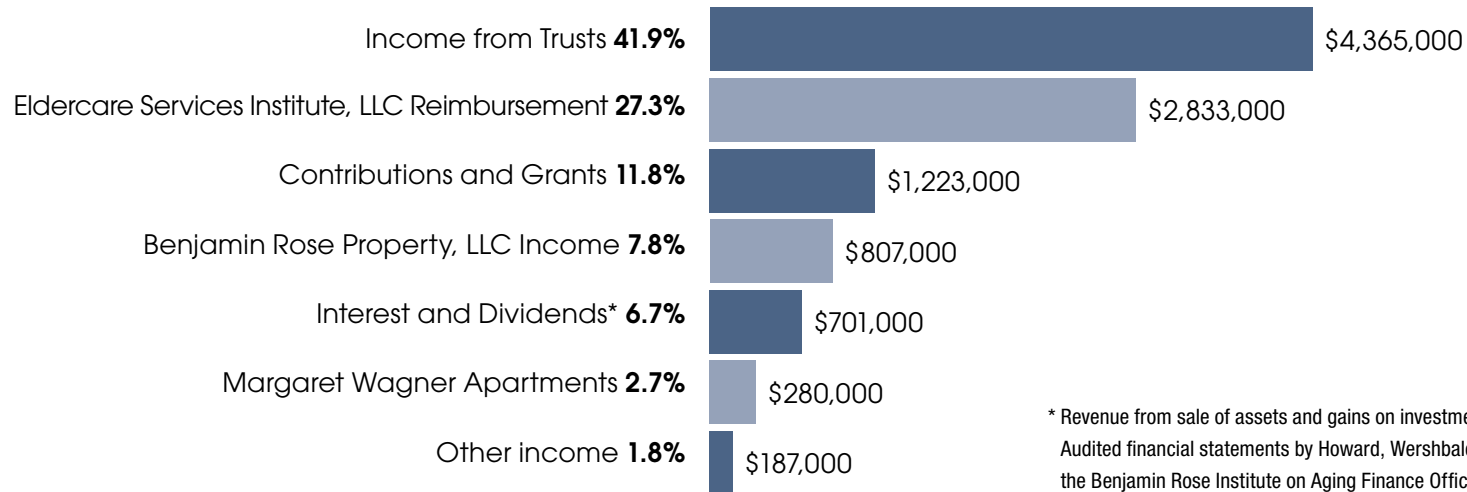
Aetna
Alcohol, Drug Addiction and Mental
Health Services Board of Cuyahoga County
Anthem Senior Advantage
Apartment Tenant Fees
Benjamin Rose Trust Funds
Child and Adult Care Food
Programs, State of Ohio
Client Fees
Cuyahoga County Board of
Developmental Disabilities
Cuyahoga County Options for Elders
Gifts and Donations
Humana
McGregor
McGregor PACE
Medicaid
Medicare

New Market Tax Credit
Ohio Department of Aging
Older Americans Act
Plain Dealer Holiday Spirit Campaign
Research Evaluation Contracts
United Healthcare
U.S. Department of Housing and Urban
Development
Western Reserve Area
Agency on Aging (PASSPORT)

FINANCIALS 2012

SOURCES OF PROGRAM SUPPORT*

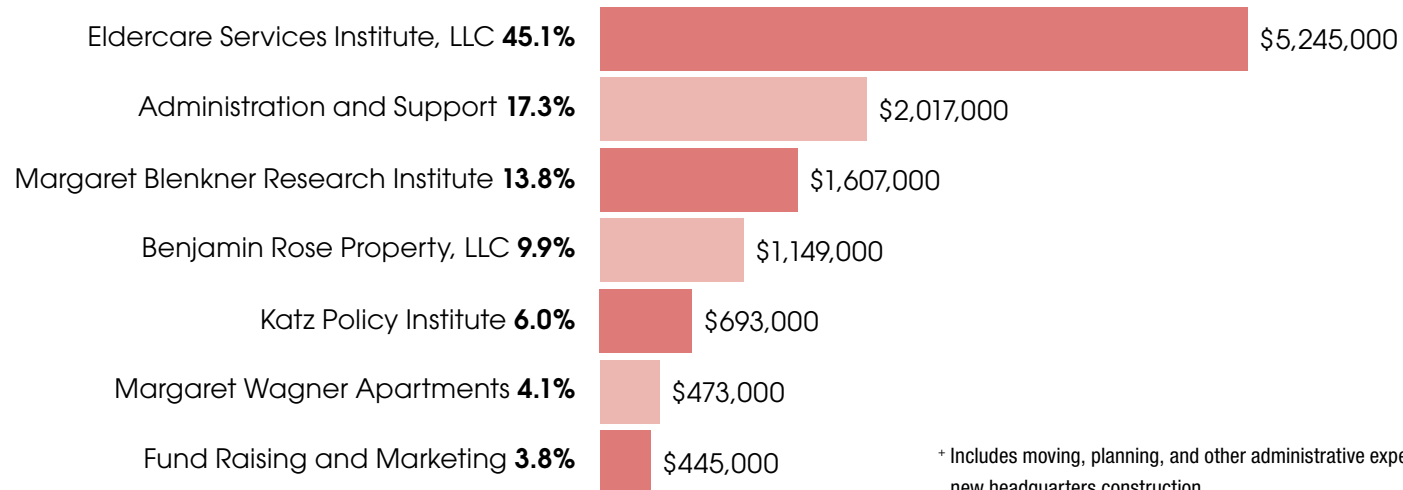
\$10,396,000



* Revenue from sale of assets and gains on investments are not included. Audited financial statements by Howard, Wershale & Co. are located in the Benjamin Rose Institute on Aging Finance Office.

COSTS OF PROGRAM SERVICES+

\$11,629,000



+ Includes moving, planning, and other administrative expenses related to new headquarters construction.

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Cleveland, OH 44120
216.791.8000

MARGARET WAGNER APARTMENTS

2375 Euclid Heights Blvd.
Cleveland Heights, OH 44106-2797
216.373.2015

ADULT DAY PROGRAM

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

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EAST
2373 Euclid Heights Blvd.
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