



Charlotte Jackson

Benjamin Rose today!

HELPING PEOPLE AGE SUCCESSFULLY Vol. 1, No. 3

Grateful client uses variety of Benjamin Rose services

If it weren't for Benjamin Rose, Charlotte Jackson might not be able to live independently. The former mortuary office employee has received help from Benjamin Rose staff over the last four years with increasing frequency.

Mrs. Jackson lives in an independent living apartment building on Cleveland's west side. She and her husband moved back to Cleveland from southern California in 1986.

"My husband was getting sick, and my back problems were so bad I had to leave my job," she explains. "After he died, I started having more health problems." Her already high blood pressure was compounded by diabetes, arthritis, a stroke and, in the last year, two knee replacements.

Mrs. Jackson is typical of most of Benjamin Rose's 1,600 in-home clients in that she has a variety of health problems and relies on government subsidies for her income.

*"If it weren't for Benjamin Rose,
I wouldn't be able to live in a place like this."*

She moved into to the new apartment so she would have easier access to meals and health services. "If it weren't for Benjamin Rose, I wouldn't be able to live in a place like this," she says.

For nearly four years, home care assistant Nisia Rodriguez has been helping Mrs. Jackson with bathing. Benjamin Rose nurse Kathy Buzin helps her keep her blood pressure and diabetes in check, and case manager assistant Bernice Brown takes her to MetroHealth Medical Center to see her doctors when she can't take the bus. She sees a physical therapist twice a week. Social worker Michele Abraham is Mrs. Jackson's case manager. She provides supportive counseling, long-range planning and coordinating services for Mrs. Jackson.

"Every person I've dealt with from Benjamin Rose has been so nice," she says. "My kids do what they can," says the mother of four sons, two of whom help her with groceries. "They're glad I've got a place like Benjamin Rose helping me."

From the desk of Richard Browdie

Six months flies by when you are learning about a new organization as active and far-reaching as Benjamin Rose.



Richard Browdie

It is a very complex organization, with multiple programs and funding sources, and with a creative staff that has become involved in dozens of internal and external initiatives relating to improving practices and services for older people. And, I have arrived at a time when its financial challenges are unprecedented. So, the occasion of writing my first contribution to our newsletter requires me to slow down for a moment and to reflect on what I've learned that I can share in a few words.

First, the organization has a tremendous capacity to serve older people through high-quality services and research. The people we have attracted through the years, and the continued support of the board of directors makes it possible. It may sound trite, but great service and great research takes great people, and at Benjamin Rose, we have them. My initial belief that we were virtually unique in our combination of services,

(continued on back)



Volunteers celebrate the harvest

Benjamin Rose volunteers gathered at Kethley House for the annual volunteer recognition dinner October 2. Guests listened to the beautiful music of Emmy-nominated pianist, Lisa Bell, as they enjoyed delicious food, light wine and friendly conversation. Special words of thanks were shared by Benjamin Rose president/CEO Richard Browdie and director of volunteer services Gloria Litwinowicz. The group was then entertained by the Tony Carmen Band.

A representative of the Retired Senior Volunteer Program (RSVP) presented a ribbon to Gladys Dale for 17,000 hours of service. Mrs. Dale also has been named Medical Mutual Senior Volunteer of the Year. Volunteers were given small tokens of appreciation. It was a wonderful celebration for wonderful people who give their time and talents to Benjamin Rose!



Tireless volunteer Gladys Dale, 96, gives Gloria Litwinowicz a chuckle.

Research conference links findings with practice

The Margaret Blenkner Research Institute marked its 40th anniversary with a conference held at the Cleveland Marriott Downtown at Key Center on October 4. Dr. Fernando Torres-Gil provided the opening keynote address. Richard Browdie, Benjamin Rose president and CEO, was the luncheon speaker.

The conference was an opportunity to highlight significant contributions made to the field of aging by the Research Institute over the past 40 years. Sessions brought together practitioners and researchers to foster better understanding of the challenges of applying research findings in everyday clinical practice with older adults.

“The Margaret Blenkner Research Institute was founded in order to conduct applied research that could be implemented directly by providers,” said Dr. David Bass, director of the Research Institute. “This conference presented examples of our research and that of others that exemplify this principle.”

In addition to Dr. Bass, Research Institute staff members Drs. Farida Ejaz, Linda Noelker and Carol Whitlatch moderated the panel sessions. Each explored the partnership of research on aging and practice within four major areas of aging services. Joining them in the panel sessions were Dr. Robert Applebaum of the Scripps Gerontology Center at Miami University of Ohio, Dr. Georgia Anetzberger of Cleveland State and Case Western Reserve universities, Sharen Eckert and John Wallin of the Alzheimer’s Association, Susan Kay of the Western Reserve Area Agency on Aging, Delores Lynch of Senior Outreach Services, Inc., Peter Van Runkle of the Ohio Health Care Association, and Dr. Marlene Stoiber of MCS Consulting Services.



Benjamin Rose board members Cathy LoPresti and Robin Gunning with CEO Richard Browdie.



Dr. Fernando Torres-Gil, former U.S. assistant secretary of aging and dean at the School of Public Policy and Social Research at the University of California, Los Angeles, discussed changing attitudes and expectations around aging issues.



Sylvia Pla-Raith, director of the At Your Call and Senior Companion programs at Benjamin Rose, Delores Lynch, executive director of Senior Outreach Services, Inc., and Dr. Phyllis (Penny) Harris, professor of sociology at John Carroll University.



Benjamin Rose distinguished scholar Dr. Sidney Katz introduced the luncheon speaker Richard Browdie.

Over 100 participants attended the daylong event, which was co-sponsored by the Western Reserve Geriatric Education Center.

Benjamin Rose *November 2002*
today!
 HELPING PEOPLE AGE SUCCESSFULLY Vol. 1, No. 3

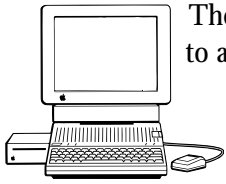
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Computer classes for seniors coming to Kethley House



The staff at Kethley House at Benjamin Rose Place is proud to announce that they are working in cooperation with the Cleveland Clinic Health System's Senior Circle PLUS® program and Web-Wise Seniors to bring computer classes to seniors in the community.

The classes have been developed to educate seniors in basic computer skills, navigating through Microsoft Windows, using popular programs such as Word, Excel and Outlook. The classes will also focus on learning how to use the Internet to access information important to older adults, while practicing how to send and receive e-mail.

The classes illustrate Benjamin Rose's commitment to improving the lives of older people through education and advocacy. The setting, at Kethley House on Fairhill Road, will offer attendees a chance to learn more about computers in an award-winning building that has ample parking.

Web-Wise Seniors, Inc. is a company dedicated to helping individuals over the age of 50 learn basic computer skills. Web-Wise Seniors teaches the senior community with the use of a mobile training lab. Senior Circle PLUS® is a program offered by the Cleveland Clinic Health System. Free and open to all adults age 55 and older, membership in Senior Circle PLUS® offers a variety of educational programs and social activities close to home.

The classes will begin on January 6, 2003, and will be held on Monday and Wednesday mornings through February 5, 2003 at Kethley House, 11900 Fairhill Road in Cleveland. For cost information, or to register for a class, please call 440.953.2443.

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Did you know?

As Benjamin Rose approaches its 95th anniversary in 2003, we are looking at the life and times of our generous founder. Few people know that Mr. Rose began his career as a carpenter in his native England. By the time he died in 1908, he was a multimillionaire in America who had developed refrigeration methods for the meat-packing industry.

Fran King, an emerita member and former president of the board of directors, has had a multifaceted relationship with Benjamin Rose.



She's also been a caregiver, as well as a user of Benjamin Rose services herself.

Recruited to the board in 1978, Mrs. King saw many changes while on the board, her own joining one of them. "Andrea

Coaxum and I were the first minority members of the board," she explains. "When I first came on, we depended more on men for financial advice. Then we started getting some women who were financially savvy."

After her husband, Drue, retired from his internal medicine practice in 1989, he began to have his own health problems. A Benjamin Rose home care aide and nurse provided in-home care.

"I was his primary caregiver, until I got a blocked artery in my leg," she says. In 1999, doctors had to amputate her right leg above the knee. Mrs. King stayed at Kethley House, first for physical therapy after the operation, then again to learn how to function with her prosthesis.

"I've seen the agency from several angles," she explains. "I'm not surprised by the quality of care we received."

A native of Boston who holds a master's degree in psychology, Mrs. King held a number of teaching and training jobs before moving to Cleveland with her husband.

The couple became involved with Shaker Heights Schools, where their four children attended. They garnered national recognition for promoting racial integration in the area. "We got together with the other residents, white and black, and decided to fight 'white flight,'" she says.

Today the couple lives at Homewood Residence, an assisted living facility in Cleveland Heights. She's an avid bridge player, and enjoys visits from her children and grandchildren. "I miss going out for walks, but I don't miss not having to cook anymore," she laughs.

Richard Browdie *(continued from front)*

research and mission orientation has been confirmed.

At the same time, the world around us is changing rapidly, and the rate of change is increasing. The need and demand for care in the community is beginning to grow rapidly, just as those of us who have been in the field have been predicting for years. The financial resources available to the organization have contracted with the economy, and Benjamin Rose's reliance on its Trusts for heavily subsidizing services has hit us particularly hard.

If our mission is to serve older people in need, then our opportunities to fulfill that mission are almost endless. The challenge for Benjamin Rose is to choose the ways in which we can have the greatest impact while maintaining our ability to develop innovative ways to serve more people in the future. Benjamin Rose is a vital resource in the effort to enhance the quality of life for elders in Greater Cleveland and beyond. Our choices in the coming months will mark our preparation for a new and exciting future for Benjamin Rose, all of it made possible by our rich and rewarding past. It is a great privilege to be a part of it.

*Richard Browdie,
President and CEO*

Kethley House resident enjoys "center stage" treatment

Kethley House at Benjamin Rose Place resident Alice Hurse recently enjoyed royal treatment, courtesy of The Key Foundation and Cleveland Play House. Mrs. Hurse and her friend, Rose Dykes, were whisked away one September night in a white limousine for a special ceremony and play.

The ceremony kicked off The Cleveland Play House's 87th season, recognizing The Key Foundation for being the only mainstage sponsor for the 2002-2003 season. The Key Foundation arranged for the pair to attend the festivities as a way of giving back to the community.

"The limo was straight from Hollywood," she says. "It had a dark blue backdrop with white stars flickering. There was a bar on the right side. On the left side, three huge pillars. It was such an awesome feeling. I could hardly lift my head because of the luxury!"

After arriving at The Play House, Mrs. Hurse and Mrs. Dykes enjoyed a champagne toast, at which Mrs. Hurse was recognized by Henry Meyer, KeyCorp president and CEO. She was escorted to her seat by Margot Copeland, KeyCorp's executive vice president — director of civic affairs and corporate diversity.

She and Mrs. Dykes then watched *Lost Highway: The Legend of Hank Williams*.

The play's story had personal significance to Mrs. Hurse. It chronicles the life of the prolific country music pioneer Hank Williams, who also was known for his alcoholism. Mrs.

Hurse is a former social worker, who also had her own clothing store for 43 years. Deeply spiritual, she is an ardent follower of the late healing evangelist Kathryn Kuhlman.

Mrs. Hurse reached out to the drug addicts and dealers who did their business near her shop. She says the play showed how humans have a short time to follow the right path. "It struck me because I believe what we eat and what we believe is what we are, both in the physical and spiritual realm. This is what happened when he [Hank Williams] lost his highway," she explains.

Mrs. Hurse was three when the Play House opened in 1915. Though she had never attended a play there, she did have a role in the making of another notable arts arena. "When I was nine, I helped my aunt paint the walls of what became the Karamu House," she says.



Mrs. Hurse prepares to enter the limo.

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Special Gifts

Memorial and Tribute Gifts provide ongoing support for Benjamin Rose's direct service to clients, regardless of their financial resources. Following are gifts received between June 16, 2002 and September 30, 2002.

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New program honors loved ones, gives lasting gift to residents and clients

There is no better way to honor the life or memory of a loved one than to take advantage of a new program approved by Benjamin Rose's board of directors. By establishing a Named Fund in honor of a loved one, you are acknowledging a life well-lived, as well as making a powerful statement of appreciation for the quality care Benjamin Rose provides.

The process is very simple: As the donor, you identify in writing the purpose your Named Fund is to serve and how it is to be administered. Benjamin Rose then carefully preserves and manages the principal of your Named Fund as an endowment investment, while awarding a fixed annual percentage each year for the purpose you direct.

Named Funds provide truly lasting gifts for future needs as well as those of today by supporting a variety of identified needs at Benjamin Rose, e.g., direct client support, education, research, capital and equipment, and general operations. While Named

Funds can be restricted or unrestricted, Benjamin Rose derives the greatest benefit from unrestricted funds that can be directed to areas of greatest immediate need.

Donors may choose from any of the following endowment general interest areas in which to establish their Named Fund: (1) direct client support, (2) general operations, (3) education, (4) research, and (5) capital and equipment.

While the minimum to establish a Named Fund at Benjamin Rose is \$10,000, you can begin the process with as little as \$2,500. This initial gift indicates your intent to contribute the remaining \$7,500 (or more if desired) at any time over the next three years. Gifts from family and friends can also be used to reach the \$10,000 threshold.

For more information, request our brochure, "Establishing a Named Fund at Benjamin Rose" by calling Ruth Ann Ference, director of development, at 216.373.1627.

A season of Thanksgiving

As we approach the most generous season of the year, our mailboxes begin to fill with appeals from a multitude of worthwhile nonprofit organizations doing good work in our community. Benjamin Rose is not unlike many of these organizations — we depend on friends like you who value how we care for those frail elderly who are often alone or have nowhere to go.

Again and again, friends and family of our current and former residents and clients ask how they can help Benjamin Rose. There are many ways to ensure that Benjamin Rose will continue our 94-year legacy of caring for the elderly “in their own homes or homes to be established for them.” While gifts often bring favorable tax benefits, the greatest satisfaction comes from knowing that you’ve helped elderly clients who are no longer able to care for themselves.

Let us share a touching example of this...some 50 years ago, Benjamin Rose helped a working daughter by caring for her mother of failing health. The daughter, now in her 80s, has named Benjamin Rose in her will. The love of a daughter for her mother’s well-being and her gratitude for the help of Benjamin Rose has endured more than half a century!

We depend on contributions to carry on our mission *to improve the quality of life for older people, their families and their caregivers through community-based and residential care, research, education and advocacy.*

The following are but a few ways to make a gift to Benjamin Rose. Keep this list, or even better, call 216.373.1607 to receive a copy of Benjamin Rose’s *Ways to Give: A Guide to Charitable Giving.*

- ***Tribute Gifts*** include memorial gifts and gifts “in honor” of someone special. These can be grown into endowed Named Funds.
- ***Permanent Gifts*** include Endowed Named Funds that last in perpetuity as well as a Perpetual Annual Giving Endowment Fund (PAGE Fund) that allows perpetuation of an annual gift.

- ***Planned Gifts*** are gifts arranged during your lifetime, but may not be received in their entirety by Benjamin Rose until after your death. There are many planned giving vehicles available that may result in significant tax savings to you. These include a bequest in a will or life-income agreements such as gift annuities (act before January 2003 for best rates of return) and charitable trusts. Perhaps the simplest of all planned gifts is for you to designate Benjamin Rose as a beneficiary of a life insurance or a retirement plan. Consult with your attorney or financial advisor for details related to individual circumstances.
- ***Other Ways to Help*** include matching gifts through an employer, in-kind gifts (call for our Wish List), and gifts of real estate, works of art, specialized collections, certificates of deposit, and U.S. savings bonds. Ask your attorney or financial planner to help you make the right gift.



Benjamin Rose recognizes donors of annual gifts through *The Rose Society*. *The 1908 Legacy Society* recognizes anyone making a lasting gift through a Named Fund or a planned gift. For more information, call 216.373.1607, to request a copy of Benjamin Rose’s *Ways to Give* brochure.

Since 1908, Benjamin Rose has provided care for thousands of Cleveland’s elderly. From residential care and rehabilitation services at Kethley House, in-home and community-based programs through Margaret Wagner House, and focused care-giving research, Benjamin Rose has been committed to improving the lives of the frail elderly of Greater Cleveland.

—*Ruth Ann Ferece, Director of Development
Institutional Advancement, 216.373.1627*



Karen Bernardo, shown here with her late father Herb Bass, remembers her father through a gift designated to help Kethley House residents with special needs.