



Sharen Eckert

# Benjamin Rose today!

HELPING PEOPLE AGE SUCCESSFULLY Vol. 3, No. 1

## Benjamin Rose Welcomes VP for Advocacy, Policy Development

Sharen K. Eckert joined the Benjamin Rose staff in January as Vice President for Advocacy and Public Policy Development. She will lead the organization's community advocacy and public policy development initiatives that enhance services available to older adults. She also will participate in heightened efforts to coordinate and promote the work of Benjamin Rose with foundations and other funding sources, working closely with the Margaret Blenkner Research Institute and Institutional Advancement, as well as service areas of Benjamin Rose in an effort to promote operational efficiencies.

*During her 17 years with the Alzheimer's Association, Eckert and her staff often collaborated with Benjamin Rose researchers.*

Eckert is hardly a stranger to Benjamin Rose. During her 17 years with the Alzheimer's Association Cleveland Area Chapter (13 of those years as Executive Director), Eckert and her staff often collaborated with Benjamin Rose researchers to develop and evaluate new programs, including the Getting Started Program for individuals who are newly diagnosed with Alzheimer's disease; the Benjamin Rose adult day program; the TOPS respite program; the Cleveland Managed Care project; and a dementia care training program for nursing assistants. Under her leadership, the local Alzheimer's Association grew from four to 40 staff members, and was able to provide many new programs and services needed by caregivers and elders with the disease.

Eckert was trained as a mechanical engineer, earning a master's degree from the University of Arizona. She was employed by Lockheed Martin as a Human Factors Specialist for more than 15 years and continues to consult for the company. Benjamin Rose is sure to benefit from her analytic skills that draw upon systems analysis, data gathering and evaluation.

## From the desk of Richard Browdie

By now, everyone who reads a newspaper regularly or watches the evening news knows that the number of older people in our society is growing. According to the Census Bureau,

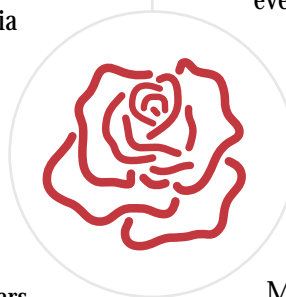


Richard Browdie

the number of people aged 65 or older in the U.S. will increase by more than 10 million by 2015. People are aware that there are issues that we, as a community and as a nation, will have to deal with as that demographic future marches toward reality. The challenge starts when people begin to draw conclusions about what living in a society with greater numbers of older people in it will actually mean, and even more importantly, what to do about it.

Since the early '60s, Benjamin Rose has been a leading source of information and insight into how these challenges might be met, through our Margaret Blenkner Research Institute and our many service programs and innovations. At our strategic plan kick-off meeting, involving more than 70 stakeholders from Greater Cleveland, participants told us in clear terms that Benjamin Rose should become more actively

*(continued inside)*



**Browdie** (continued from front)

involved and more visible as an advocate for older people. Now, through the strategic direction adopted by our Board of Directors, we are moving forward to take a more active role in bringing together our resources in research, program operation and information sharing to become an effective and forceful advocate for the interests of older adults. And in that more active role, we will be reaching out to organizations and involved individuals like you, with whom we can collaborate to develop our advocacy agenda. Together we can add our voices to those who share our commitment to meeting the needs of older people, with a special emphasis on those whose needs outstrip their resources or those of their caregivers.

In taking on this new direction, we are especially aware of the tremendous leadership given over the years, and to this day, by many individuals and organizations, including the Council on Older Persons of the Federation for Community Planning, the Western Reserve Area Agency on Aging, and others. We hope to add our capabilities in analysis and development to enhance the ability of all of us who are working in this arena.

I have been asked the question, "Why now?" Do we need advocacy now, based on strong analysis and a commitment to high quality service? My answer is, if not now, when? Just read the papers.



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*Benjamin Rose today!* is published by the Institutional Advancement division of Benjamin Rose.

Polly Clemo, *Vice President, Institutional Advancement*  
 Doug Knoop, *Fundraising Specialist*  
 Anne Schleicher, *Consultant*  
 Jeanne Hoban, *Consultant*

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**Cleveland Foundation Intern Gains Experience at Benjamin Rose**

People familiar with Benjamin Rose know that the organization provides much-needed services to older adults and their families. They may not be aware, however, of the service Benjamin Rose provides to somewhat younger adults. Each year, members of the next generation of gerontologists, social workers, nurses and others rely on Benjamin Rose to gain the skills, knowledge and practical experience necessary to succeed in their fields.

Devon Fegen is one such young person. The social work major at Indiana University spent last summer working with Benjamin Rose Community/In-home Services and administrative offices as part of the Cleveland Foundation Summer Internship program. The program supports the employment of talented college students in nonprofit organizations.

Among her accomplishments during the internship, Devon applied for and received a grant to secure a software mapping package for the organization. Among other things, it helped Community Services (CS) pinpoint the location of senior housing facilities in Cuyahoga County that offer the Residential Services Supplement, an Ohio program which provides a cash payment to people who are not able to live alone but do not need to be in a nursing home. It also enables CS to map the location of all clients throughout the county. The process involved interviews with case managers, clients and administrators at the homes about the levels of services available, satisfaction with service and other pertinent issues.

With her personal philosophy, Devon fit right in with the many dedicated professionals she met during her experience at Benjamin Rose. "I think we are here to serve others," she wrote in her application essay. "Our most valuable resource is other people, and as such, we should take care of them."

A resident of North Olmsted, Devon plans to return to Ohio following her graduation later this year to pursue a graduate degree in social work.

***Did You Know?***

**Project 60 Offers Lifelong Learning Opportunity**

Ohio residents, age 60 or older, can enroll in classes at Cleveland State University on a tuition-free basis through a program called Project 60. Students are responsible for purchasing their own textbooks, transportation, parking passes, and any other fees (i.e., studio art, music lessons, laboratory and technology fees, etc.). Classes are taken on an audit basis only, so you cannot earn a degree with the classes you take through Project 60. Most courses are open to students in the program on a space-available basis.

Besides learning a new skill or increasing knowledge in an area of interest, Project 60 students:

- Receive an official CSU

- identification card
- Have access to CSU Library resources
- Can use the computer labs located on campus
- Are free to use the swimming pool, weight room, racquetball courts, and other CSU physical education facilities
- Can use the services of the Career Services Center
- Receive student discounts with the use of CSU ID card
- Benefit from the personal enrichment of experiencing the classroom setting of a diverse institution

For more information, call the University Studies Advising Center at 216.687.2279.

BENJAMIN  
ROSE  
**findings**

A NEWSLETTER OF THE  
MARGARET BLENKNER RESEARCH INSTITUTE

Winter 2004

## The Faces of Caregiving

### *How Older Adults and Family Caregivers Think About the Care Situation*



The Margaret Blenkner Research Institute (MBRI) of Benjamin Rose is conducting research on the decision-making and service-use patterns of caregiving families. Over the past four years, a total of 111 family caregiving pairs were interviewed. These “dyads” consisted of an adult with chronic memory or

physical problems (care recipient), and the family member or friend who helped the care recipient the most (caregiver). Each family was interviewed yearly over the course of three years. The Robert Wood Johnson Foundation, The AARP Andrus Foundation, and The Retirement Research Foundation provided funding for this research.

Through interviews with families, the MBRI hoped to answer a number of important questions. These included:

- How do families discuss and make decisions about caring for older family members?
- What kinds of professional services do caregivers use and find most helpful in caring for their relatives?
- What impact does caregiving have on family relationships?
- How do caregiving families change as time goes by?

#### **Who Was Interviewed?**

Most of the *caregivers* interviewed for this project were female (81%) and were the wife (33%) or daughter (33%) of the person for whom they were caring. The remaining caregivers were husbands, sons, sisters, nieces, nephews, cousins, or friends. Caregivers ranged in age from 30 to 91 years old. On an average, caregivers provided 72 hours of care per week.

The relatives *receiving* care ranged in age from 39 to 94 years old, and slightly more than half were female (54%). Those receiving care were most likely the caregivers' mothers (39%) or husbands (34%). Most suffered from memory problems due to Alzheimer's disease or dementia (78%).

Save the Date!  
Community Forum on  
**The Faces of Caregiving**  
Sponsored by the Margaret Blenkner  
Research Institute

Tuesday, March 30, 2004  
9 to 11 a.m.  
Kresge Room, Kethley House,  
11900 Fairhill Road

Call 216.373.1674  
for registration information

## What Families Say About the Caregiving Experience:

*“It’s been a tremendous learning experience for me, both about myself and everyone in my life...my family and my husband. Becoming a caregiver is almost full-time.”*

~Wife caring for her Husband

*“I live with my daughter. She takes care of me and takes me places. I feel comfortable and happy.”*

~Mother cared for by her Daughter

*“We have family discussions before we make any major decision about my care. I get good care from my family.”*

~Mother cared for by her Daughter

*“I’m coming to terms with the disease process. I have learned to get more help.”*

~Daughter caring for her Mother

*“When you have unconditional love for your parent you don’t know how much you’ll do. You think you can’t do something and then you do.”*

~Daughter caring for her Mother

*“I’m very positive. I live day by day. I have a pretty good life and I try to make it better. Your questions let me know myself better.”*

~Father cared for by his Daughter



## Named Funds



Ruth Fiordalis

Donors to Benjamin Rose can begin the establishment of a named fund to honor the memory of a loved one at any time during the year. Board member Ruth B. Fiordalis has begun the creation of such a fund to honor her mother, Mrs. George M. Barnes, who served on the board from 1955 until her death in 1972. In addition, she served as president from 1960-1961.

The **Ruth P. Barnes Board Enrichment Fund** will "provide enrichment (education, training, strategic planning, etc.) for the Board of Directors." Benjamin Rose extends special appreciation to Mrs. Fiordalis for beginning this fund.

## Web Site

Visit our newly redesigned Web site at [www.benrose.org](http://www.benrose.org) for information about the services offered by Benjamin Rose and the latest happenings within the organization.



## SeniorsConnect

The North Coast SeniorsConnect is now online. Identified as a priority by the collaborative Senior Success Vision Council, of which Benjamin Rose is a member, the Web site offers a wealth of information of interest to older adults and people who care for them. With a simple click, users can learn about caregiving; computers and technology; health, home and living options; and other topics of interest. Visit the Web site to find out more: [www.seniorsconnect.org](http://www.seniorsconnect.org)

## 2004 Board of Directors

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## We Depend on You!

As a nonprofit organization, Benjamin Rose relies on the generosity of individuals like you to further its mission of advancing the health, independence, and dignity of older adults by raising the standards for quality of care. Please consider making a donation today!

Complete the following information and mail this form to:

Benjamin Rose  
850 Euclid Ave., Suite 1100  
Cleveland, OH 44114  
Attn: Development

Enclosed is my donation of \$ \_\_\_\_\_

My Name is \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Day Phone \_\_\_\_\_

E-mail \_\_\_\_\_

*Please make your tax-deductible check payable to: Benjamin Rose.*

Charge my contribution to:

\_\_\_ MasterCard \_\_\_ Visa \_\_\_ Discover

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Card # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Expiration Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Signature \_\_\_\_\_

My gift is in memory of

\_\_\_\_\_

or in honor of

\_\_\_\_\_

## Community Forum on Caregiving

The Margaret Blenkner Research Institute will sponsor a community forum, titled "The Faces of Caregiving: How Older Adults and Family Caregivers Think About the Care Situation," on Tuesday, March 30, 2004.



Carol Whitlatch

The event will bring together researchers, practitioners, and family members to discuss the various aspects of caregiving from different perspectives.

Presenters for the forum include Carol Whitlatch, PhD, and Katherine Judge, PhD, from the Research Institute, Michelle Abraham, MSSA, LISW, from Benjamin Rose Community/In-Home Services and Jeffrey Mostade, MA, PCC, NCC, of Senex ElderCare. A caregiving family will join the panel to share their experiences.



Michelle Abraham

The forum begins at 9 a.m. in the Kresge Room at Kethley House at Benjamin Rose Place, 11900 Fairhill Road.



Jeffrey Mostade

Registration is required; social work CEUs are available. Cost of the forum is \$10 for professionals; students and caregiving families will be admitted free.

Registration includes a continental breakfast. Deadline to register is Friday, March 26.

For more information and to register, visit [www.benrose.org](http://www.benrose.org) or call 216.373.1674.

## Past BR Employee Honored by AARP

Former Benjamin Rose Community Services employee Rita



Rothstein was recently awarded the Andrus Award for Community Service by AARP Arizona. The Andrus is the most prestigious volunteer award offered by the Association.

Each year, AARP chooses an individual from each state to receive the award, which recognizes AARP members or volunteers who, through volunteer service, enhance members' lives in the areas of health and wellness, economic security and work, life transition issues, and personal enrichment.

Rothstein was chosen for her work in establishing the Sunflower Neighbors volunteer program, which provides transportation, person-sitting, and referrals to community resources to disabled or ill residents of the Sunflower subdivision in Tucson. She also volunteers as an ambassador for the Pima (Arizona) Council on Aging, and oversees an Alzheimer's support group.

A 12-year Benjamin Rose employee, Rita Rothstein worked as a quality improvement coordinator before retiring to Arizona in 2000.

## Home for the Holidays

Residents of the Margaret Wagner Apartments celebrated their first holiday season in their new home. The apartments opened in May 2003.





## Need More Income in 2004?

A Charitable Annuity May Be the Answer!

Would you like to support the work of Benjamin Rose with Greater Cleveland's elderly in 2004? Of course! But you may also be looking for ways to increase income in the New Year. **Benjamin Rose donors have found the answer: a charitable gift annuity.** It provides meaningful support for Benjamin Rose AND provides the donor with lifelong fixed annuity payments.

Charitable gift annuities have been around for a long, long time. In exchange for cash donated now, Benjamin Rose, a 96-year-old nonprofit serving Greater Cleveland's elderly, is providing older donors with an annual income of 5.5% to 11.3% of the amount donated. The donor gets a partial income tax deduction and the promise of a monthly or quarterly check for life. The charity gets the difference between what's donated and the cost of the payments.

The income tax deduction can range from 10% to 50%, according to Frank Minton, president of Planning Giving Services, a Seattle consulting firm. Older donors get larger deductions because they aren't expected to collect benefits for as long.

Charitable gift annuities create a "win-win" situation – for the donor and the reputable charity that commits its full organizational

resources to fulfill the annuity payments. An example of this mutual benefit can be seen in this recent report from a local charity. They had an 87-year-old donor who wanted to make a charitable gift. He was concerned, however, that his gift would take away from his family's inheritance. Through a creative combination of planned giving techniques, this gentleman was shown that he could make a \$300,000 charitable gift through a charitable gift annuity and use the income from the high-rate annuity (9%) to pay the premium for a \$300,000 life insurance policy. Results:

- (1) The donor was happy because he was able to make a significant charitable gift AND not diminish his legacy to his family;
- (2) The family will receive an income and estate tax-free life insurance benefit in the same amount as the gift to the charity; and
- (3) Additionally, if the donor funds the annuity with appreciated assets, he is saving taxes for his family as well. The use of a life insurance component is widely used and referred to as asset wealth replacement.

### Benefits:

- **Dependable Fixed Income.** Receive fixed income for life for one or two people, offering attractive rates of return (determined by the annuitant's age—the older you are, the better the rate you receive);

- **Immediate Tax Savings.** You can take an income tax charitable deduction in the year you make your non-revocable gift. If you fund your annuity with appreciated securities, you can avoid or defer capital gain taxes you would have paid had you sold the asset.
- **Leave a Legacy.** Your gift will ensure our natural world will be protected for future generations. Become a member of the Benjamin Rose 1908 Legacy Society.

### Gift Requirements:

- **Minimum Age:** 60
- **Minimum Dollar Amount:** \$10,000 in cash or securities

The charitable gift annuity contract is easy to understand, is often just a single page, and does not require an attorney to execute. Nonetheless, anyone considering a charitable gift annuity or any major charitable gift should always seek his or her own legal and/or financial counsel.

Call Polly Clemo today if you would like to receive a personalized proposal for a charitable gift annuity. Simply let us know the date(s) of birth for the income beneficiary(ies) and the gift amount you are considering, and we'll do the rest. This does not place you under any obligation to Benjamin Rose. You can contact Polly by e-mail at [pcleo@benrose.org](mailto:pcleo@benrose.org) or by phone at 216.373.1606.

## Benjamin Rose Adds New Legacy Member

Benjamin Rose welcomes Mrs. Elizabeth Hitchcock Rose as its newest 1908 Legacy Society member. Mrs. Rose served as a Benjamin Rose board member from 1952 through 1971; she served as President of the Board in 1964-1965. In recognition of her "exceptional service to Benjamin Rose," the Board of Directors granted her emerita status, a distinction bestowed on former members.

Mrs. Rose's legacy to Benjamin Rose is well founded. Her grandmother, Mrs. Peter M. Hitchcock, was personally invited by Mr. Benjamin Rose to serve on the organization's original board before his death in 1908.

If you have made provisions to include Benjamin Rose in your will, retirement plan, or life insurance, as Mrs. Rose and 29 other 1908 Legacy Society members have, please share this wonderful news with us today. Call Polly Clemo, at 216.373.1606.



Elizabeth Hitchcock Rose

## Benjamin Rose Donors Are Special

Every gift, whether unrestricted, restricted or made in memory or tribute, is important to Benjamin Rose's ability to deliver quality services to Greater Cleveland's elderly population. We extend our sincere appreciation to the following donors for their gifts received from October 1, 2003 through December 31, 2003.

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#### Mary F. Conway

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#### Trudy Howe

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### In Memory of

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### Martha Van Achter

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Alma Zimmerman

*You can find more information on resources available to older adults dealing with memory problems and their families by contacting one of the organizations listed below.*

National Center on Caregiving  
Family Caregiver Alliance  
690 Market Street, Suite 600  
San Francisco, CA 94104  
(415) 434-3388  
www.caregiver.org

National Association of Area Agencies  
on Aging  
1112 16th Street, NW  
Washington, DC 20006  
(202) 296-8130  
www.n4a.org

Alzheimer's Association National HQ  
919 N. Michigan Avenue  
Suite 1000  
Chicago, IL 60611  
(312) 335-8700, Toll Free (800) 272-3900  
www.alz.org

National Association of Professional  
Geriatric Care Managers  
655 N. Alvernon Way  
Suite 108  
Tucson, AZ 85711  
(602) 881-8008 (to find geriatric care  
managers in particular geographic areas)  
www.caremanager.org

National Alliance for Caregiving  
4720 Montgomery Lane  
Suite 642  
Bethesda, MD 20814-3425  
www.caregiving.org

### ***What is Important to Families as They Make Decisions About Care?***

Caregivers and those receiving care were asked how much they discussed their wishes for daily care. About one-third of caregivers and care receivers said they talked about their wishes a lot, while an equal number said they never had.

In general, caregivers and those receiving care agreed on the most important values and preferences for daily care. The values and preferences they considered most important included: "Having a comfortable place to live," "Having the caregiver be the main one who provides help," and "Continuing to stay in their own home." Sometimes the caregivers and those receiving care disagreed on what values and preferences were most important. For example, compared to caregivers, care recipients felt it was more important to "have something to do" and that the caregiver should "not put their life on hold" to provide care.

### ***What Professional Services Are Families Using?***

Caregiving families reported using an average of five professional services. The most frequently used services helped with:

- providing information about the care recipient's illness
- arranging services or benefits
- housework or shopping
- grooming and personal care
- emotional support for caregivers

### ***Caregiving and Family Relationships***

Interviews with caregivers showed both the positive and negative aspects of caring for a relative with memory problems. Feelings of physical and mental exhaustion, frustration, and isolation were a few of the difficulties many caregivers mentioned.

The majority of caregivers (82%) however, reported that caregiving had taught them many important and positive things about themselves and their loved ones.

### ***What's Next?***

We believe that gathering honest information from adults with memory problems and their caregivers is the best way to improve the quality of services in the future.

Information from these interviews has been presented at conferences internationally and throughout the United States. In addition, a number of brochures have been published to guide caregiving families as they discuss and make decisions about care. If you would like more information about this project, or other projects taking place now at the MBRI, please contact 216.373.1604.

BENJAMIN  
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#### **Administration**

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