

# Benjamin Rose today!

CARING FOR OLDER ADULTS... AND THOSE WHO CARE FOR THEM

Vol. 8, No. 1

## First-Ever Gala a Huge Success!

More than 240 guests joined us for our Centennial Gala Celebration at the Union Club on October 25. Thanks to the success of the evening's silent and live auctions, as well as generous support of our sponsors, we raised more than \$104,000 in support of the Katz Policy Institute. A very special "thank you" to the following sponsors:

Signature Event Sponsor  
McGregor

Supporting Event Sponsor  
Victory Capital  
Management

Event Patron Sponsors  
Calfee, Halter &  
Griswold LLP  
Fairport Asset  
Management  
Kindred Hospital  
Cleveland/Gateway  
Lincoln Electric  
The MetroHealth  
System

## From the Desk of Richard Browdie

As we begin our 101<sup>st</sup> year, the Benjamin Rose Institute can feel pretty good about itself. By any measure, we had a good year in 2008. We achieved continued improvements in our operating results despite an increasingly difficult operating environment.

Our efforts to generate a successful 100<sup>th</sup> anniversary gala, along with other programs throughout the year, more than accomplished our goals. We increased our presence in Washington and Columbus, while at the same time enhancing our visibility as policy analysts and advocates through our Katz Policy Institute, which continues to draw more attention. So, all in all, we had a very good year.

You have all heard the phrase "May you live in interesting times!" 2009 promises to be another very interesting year. With the nation's (indeed, the world's) increasingly difficult economic environment, all non-

profit institutions, particularly those that rely heavily on trusts and donations for support, are heading into difficult times. Most will face difficult challenges, and many will have to make painful decisions to change the scope or character of their activities. We at Benjamin Rose have the good fortune to be somewhat prepared, due largely to the work of the last two years. But prudence demands that we prepare even further for economic conditions that will continue to get worse before they get better.

There are reasons to have at least some optimism. A new administration in Washington

*continued on next page*



Richard Browdie  
President/CEO

## Fairport's 'Community Beacon'

The Benjamin Rose Institute extends its sincere appreciation to Fairport Asset Management, which chose BRI as its 2008 Community Beacon recipient. Each year, Fairport selects one charitable organization to support in unique and useful ways.

During the year, Fairport sponsored tables at our fall conference and luncheon and at our Centennial Gala Celebration. Employees and clients donated items to the live and silent auctions at our gala. Fairport employees were

encouraged to consider BRI in annual giving plans. And several employees volunteered with BRI's Adult Day Program, interacting with clients during holiday activities in October and December.

Special thanks to incoming Board of Directors Chairman Emily Drake, partner and senior advisor at Fairport, for nominating BRI as Community Beacon, and to Fairport Marketing Manager Kristen Gall for coordinating the many wonderful activities undertaken on our behalf.

## Board of Directors

Emily A. Drake  
*Chairman*

Kathryn L. Kaesberg  
*Vice Chairman*

Leigh L. Fabens, PhD  
*Past Chairman*

Yvette M. Ittu  
*Treasurer*

Marcia J. Wexberg  
*Secretary*

Nancy A. Adams

Selma A. Baron

Suzanne Carle

Anne M. Feleppelle

Ruth B. Fiordalis

Patricia R. Frutig

Amy Scott Gilchrist

Giesele R. Greene, MD

Robin S. Gunning

Nichol D. Higdon

Janet M. Hildebrandt

Hermine E. Krasny

Denise M. Kresevic, PhD

Catherine D. LoPresti

Nancy G. Rome

Elizabeth F. Stueber

### Members Emeritae

Mary F. Conway

Mary deC. Emerson

Mrs. Robert I. Gale, Jr.

Barbara Y. Galvin

Mrs. Hugh R. Gibson

Sally K. Griswold

Mary C. Groves

Mary R. Izant

Virginia R. Izant

Frances M. King

Margaret B. Kuechle

Jennifer B. Langston

Barbara S. Oldenburg

Ella H. Quintrell

Elizabeth H. Rose

Gretchen D. Smith

Juanita Storey

Sara E. Wallace

## Browdie *(continued from page 1)*

brings new leadership in the positions of Assistant Secretary for Aging, the Assistant Secretary for Planning and Evaluation and the Secretary of Health and Human Services. We look forward to an increased interest in the issues of understanding and pursuing public policies that better prepare the nation and the state for the challenges and opportunities that will come with an aging society.

In the larger context of health reform, insurance coverage and cost containment in medical care will be addressed. There is widespread belief that long-term care will not be the preeminent issue nor the first one addressed. We will argue, we hope successfully, that the position of long-term care as a secondary and less severe problem is both short-sighted and fiscally unwise, especially in view of its tremendous impact on state governments. Indeed, it is this specific kind of debate we believe the Katz Policy Institute, informed by the research of our Margaret Blenkner Research Institute and our experience as a service provider through the Eldercare Services Institute, is designed to address.

It seems appropriate at this time in history that BRI will be reviewing its strategic direction in 2009. The environment in which we consider our future will be dynamic, perhaps even turbulent. We will have to weigh opportunities against obligations and risks against potential rewards. If we can find the right formula and gain the cooperation of others, it could be the beginning of big things for BRI and the people and organizations we work with. At a minimum, we can get through the difficult economic times prepared to grow when economic recovery begins.

Because of our good fortune and hard work in the last few years, BRI could be called upon to support changes that may help services survive and become more efficient, expanding our impact in the community. In any case, we will do what we can to meet the rising tide of need in the face of diminished community resources without undercutting our basic financial soundness.

Will these be tough times? It seems very possible that they will be. Will these be challenging times demanding hard thinking and more difficult choices? It seems probable that they will. Will these be interesting times? There is no doubt.

Benjamin Rose  
**today!**  
CARING FOR OLDER ADULTS... AND THOSE WHO CARE FOR THEM

**WINTER 2009 Volume 8, No. 1**

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

Polly Clemo, *Vice President, Institutional Advancement*

Jeanne Hoban, *Manager of Marketing*

Kerry Mink, *Manager of Development*

© 2009 Benjamin Rose Institute

## Recognizing Independent Living Advocates

The Benjamin Rose Institute joined the Western Reserve Area Agency on Aging in recognizing contributions to the independence of older adults. WRAAA presented its first Older Adult Independent Living Awards in July 2008. BRI sponsored the Katz Advocacy Award to recognize an individual or organization that has worked to improve public programs and policies to advance the health, independence and dignity of older adults. The first Katz Advocacy Award was presented to Sandy Calvert, Program Director of the HANDS Foundation, a Medina County nonprofit dedicated to improving the lives of senior citizens.



From left, WRAAA Executive Director Ron Hill, Sandy Calvert and BRI President/CEO Richard Browdie.

# quality

## Recertification

The Commission on Accreditation of Rehabilitation Services (CARF), the accrediting agency for the Eldercare Services Institute (ESI) of Benjamin Rose, will again survey ESI during the months of May and June, 2009. ESI completed and electronically submitted an Intent to Survey, which was accepted by CARF in December 2008.

Our first survey was in June 2006, after which a three-year certification was awarded by CARF. The spring survey will review all organizational functions, as well as the programs of Mental Health case management, the Partial Hospitalization Program, and Mental Health counseling.

Last year, ESI committed to implementing CARF's Aspire to Excellence approach to continuous quality improvement of services.

## Stakeholders' Satisfaction Survey

In June 2008, satisfaction surveys were sent to 17 stakeholders who made frequent referrals to the Eldercare Services Institute of Benjamin Rose.

Respondents were asked to rate ESI in the following areas: accessibility; knowledge and professionalism of Intake; response time to referrals; quality of service provided; and the need for expansion of services or development of new services.

All 17 stakeholders responded, with an overall satisfaction rate of 89%. All respondents rated Intake favorably, and most (94%) were happy with the response time. Each of the stakeholders was also asked to rate the quality of individual programs compared to other providers. Fifty-five percent rated ESI services as "much better" or "somewhat better" than other similar services provided elsewhere. Quality results were skewed due

to the large number of "don't know/unsure" responses.

Among the areas of expansion/new services suggested by respondents were expanding the number of home health aides, providing transportation, and the need for case manager assistants.

The Stakeholder Satisfaction Survey is part of ESI's effort to continually improve the quality of services and be responsive to the needs of clients and the community. A second survey was distributed in December of 2008 and responses are currently being reviewed. Look for the results in the Spring issue of *Benjamin Rose today!*

## Project Assist Earns Helping Hands Award

Project Assist Integrated Behavioral Health System received the Helping Hands award in the Contract Agency Program category from the Cuyahoga County Community Mental Health Board (CCCMHB) at its 2008 annual meeting. Project Assist is a collaborative program including the Eldercare Services Institute of Benjamin Rose, CCCMHB, the Cuyahoga County Department of Senior and Adult Services, the Adult Guardianship Program, and Recovery Resources. The Helping Hand awards recognize individuals and organizations for extraordinary achievements in the mental health field.



CCCMHB Director William Denihan, left, with members of the Project Assist collaborative.

## Collaborative Lecture Series

The Benjamin Rose Institute and our partners in the Senior Health and Wellness Center are teaming up to offer a series of continuing education workshops throughout 2009. The collaborative includes BRI, The MetroHealth System, Concordia Care and the Visiting Nurse Association of Cleveland.

The series kicked off January 15 with a workshop on HEAP – the Home Energy Assistance Program. Danette Allums and Betty Morgan of the Cuyahoga County Department of Senior and Adult Services provided valuable information on helping clients access the program and deal with home energy issues.

The next workshop in the series will be held on Thursday, February 19 in the Kresge Room at Kethley House, 11900 Fairhill Road. Paula Britton, PhD, will present Professional Boundaries and Ethics. Registration and continental breakfast begin at 8:30 a.m., followed by the presentation at 9 a.m. Three clock hours are available for social workers, counselors and nurses.

All future programs in the series will be held on the third Thursday of each month at the Senior Health and Wellness Center, 4229 Pearl Road.

Cost of each workshop is \$15.

Upcoming topics include the U.S. Department of Veterans Affairs; Legal and Financial Issues; Medicare and Medicaid; Advanced Directives; Employee Assistance Programs; IMR: Illness, Management, Recovery; and Alternative Therapies.

Topics are subject to change. For updates and registration details, visit [www.benrose.org/events/SHWC\\_Collaborative\\_Lectures.cfm](http://www.benrose.org/events/SHWC_Collaborative_Lectures.cfm) or call 216.957.3838.

## Holiday Spirit

The Benjamin Rose Institute is honored to be one of the 20 area agencies selected for the 2008-2009 *Plain Dealer* Holiday Spirit program. Our social work and mental health services were spotlighted in a December 21 article in the daily newspaper. Thanks to the generosity of Holiday Spirit donors, we were able to provide needed items such as bedding, clothing, small appliances, food gift cards and others to nearly 100 clients.

## Save on Winter Energy Costs

Here are some tips from the Better Business Bureau Senior Awareness Initiative to help you maximize comfort and minimize energy costs for heating during the winter months:

- Set the thermostat back to 68 degrees during the day and 58 degrees at night.
- Check furnace air filters once a month during the heating season. If they become clogged, clean or replace with new filters.
- Block drafts at the bottom of doors with a rolled up rug or bath towel.
- If a playing card fits in the crevice of an outside door, you need more weather stripping.
- Use a vaporizer to humidify bedrooms. You'd be surprised how much warmer a lower temperature can seem with a little humidity in the air.
- Limit traffic into and out of your home to keep it warmer and draft free.

## Caregiving Counseling

Caregivers need to look out for their own well-being in order to provide optimal care for their loved ones.

While the rewards of caregiving are great, caregivers are susceptible to negative effects on their overall well-being, as well as their physical and mental health. Caregivers who suffer from harmful stress may experience loss of appetite, get sick more often, withdraw from relationships, experience headaches, backaches or unusual fatigue, or exhibit other negative outcomes.

Counseling may lessen these effects and help the caregiver develop healthy coping mechanisms.

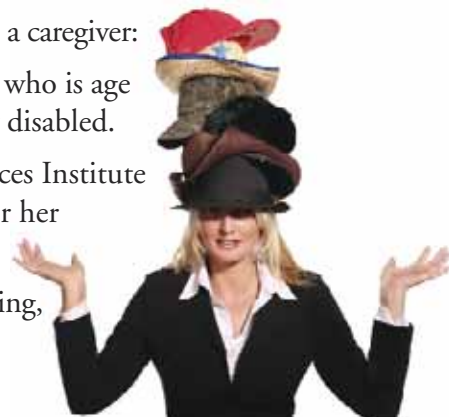
With funding from the Western Reserve Area Agency on Aging, the Social Work Department of the Eldercare Services Institute of Benjamin Rose is able to provide short-term counseling at no cost to the caregiver. Counseling services are provided in the place the caregiver chooses.

## Eligibility Criteria

To be eligible for the free counseling sessions, a caregiver:

- must care for a family member or friend who is age 60 years or older or who is permanently disabled.
- cannot be a client of the Eldercare Services Institute (ESI) of Benjamin Rose. However, his or her care recipient may be an ESI client.

For more information on Caregiver Counseling, call Intake at 216.791.8000.



## 1908 Legacy Society

Members of the 1908 Legacy Society have included the Benjamin Rose Institute in their estate plans or established endowment funds. These donors share a belief in the value of our mission and services and wish to support them for future generations.

Anonymous (3)  
Margaret Barnes  
Aloise G. Bates  
Polly Clemo  
Helen C. Cole\*  
Lewis E.\* and Lois H. Cole  
Mary French Conway  
Barbara Denison\*  
Dale\* and Dorothy Dettmer  
Emily Ann Drake  
Mary and Oliver Emerson  
Ruth B. Fiordalis  
Barbara and Peter Galvin  
Catherine R. Gerbic  
Thomas J. and Judith Fay Gruber  
David and Robin Gunning  
Catherine Heiser  
Sarah O. Hirsch  
Alice J. Kethley  
Jennifer B. Langston  
Linda S. Noelker, PhD,  
and Raymond Jason<sup>n</sup>  
Barbara S. (Buster) Oldenburg  
Henry Ott-Hansen  
Edward H. Richard  
Linda Richard  
Dale M. Rothenberger  
Faye M. Shapero\*  
Susan and Jackson G. Simpson  
Gretchen Smith  
Marcia J. Wexberg  
Dorothy M. Young\*

\* deceased  
<sup>n</sup> new

# HELPING OLDER FRIENDS TODAY AND TOMORROW

# legacy

## Join Our Legacy of Helping Older Adults

The Benjamin Rose Institute, serving Greater Cleveland for more than 100 years, is grateful to our **1908 Legacy Society** members listed at left. These loyal and generous donors have thoughtfully provided for a gift to Benjamin Rose in their estate plans or have established endowment funds. If you have provided for the Benjamin Rose Institute through your will, trust, IRA, life insurance or other planned gift, but do not see your name listed, please contact our Development Manager Kerry Mink at 216.373.1607. You may also contact us and still remain anonymous. We are planning a social gathering to thank our Legacy Society donors and want to make sure you receive an invitation!

To find out if a legacy gift is the right option for you, please call Kerry at 216.373.1607 to discuss all of your planned giving options in more detail.

In addition to potential current and future tax benefits, planned gifts are the perfect way to maintain your level of giving during the current economy and still provide a lasting legacy. Planned gifts are essential to the future of Benjamin Rose and play an important role in helping us and our clients weather the storm of economic downturns. These gifts ensure that we can continue to provide much-needed services for older people and the people who care for them.

## Very Special Thanks!

Our deepest appreciation to the individuals and organizations who contributed to the success of our Centennial Gala Celebration with live and silent auction donations. Their generous support helped us raise more than \$104,000 in support of the Katz Policy Institute!

The Alcazar  
The Alpha Group Agency  
Another Place in Time  
Chuck Baird  
Tom Batiuk  
Eileen Beal  
Benjamin Rose Institute Board of Directors  
Boulevard Blue  
Bravo Cucina Italiana  
Brio Tuscan Grille  
Calfee, Halter, & Griswold LLP  
Suzanne Drake Carle  
CeeBe Jewelry  
Polly Clemo  
Cleveland Browns  
Cleveland Cavaliers  
Cleveland Indians  
Cleveland Marriott Downtown  
Mary & Bill Conway  
Cuyahoga Community College  
Dix & Eaton

Eisner Gohn Group—New York Life  
Fairport Asset Management  
Stephanie FallCreek & Jerry Tillman  
Tina Fey  
Peter L. Galvin  
The Grapevine  
Great Lakes Brewing Co.  
Giesele Greene, MD  
Robin & David Gunning  
Jeanne Hoban  
Hyde Park Restaurant Group  
Inn at Brandywine Falls  
J. Hall Design  
Dr. Alice J. Kethley  
Lakewood Senior Health Campus  
Laurice Skin Care & Cosmetics  
Leimkuehler, Inc.  
Catherine LoPresti  
M. Castoria Fur & Leather  
Marengo Luxury Spa  
Markfrank Hair Salon Cedar Green  
NewsChannel 5

Ohio Wine Producers Association  
Organizing 4U  
The Pattie Group  
Pickwick & Frolic  
Quintana's Barber & Dream Spa  
Scott Roulston  
Shaker Square Wine & Spirits  
Seeley, Savidge, Ebert & Gourash Co., LPA  
Stages at the Cleveland Play House  
Star at Playhouse Square  
Betsy & Fred Stueber  
A Touch of Class Limousine Service  
TWINZ Catering  
George Vlosich  
Walden Inn  
WCLV 104.9FM  
WDOK 102.1FM  
WNCX 98.5FM  
YMCA of Greater Cleveland  
Jim Zak

# Our 100th Anniversary Year

In 2008, the Benjamin Rose Institute marked its 100th year of caring for older adults and those who care for them. We celebrated the occasion by hosting a number of programs and events throughout the year. Here are a few of the highlights:



BRI staff member Semanthie Brooks, above left, with presenter Jim Collins, PhD, at our fall conference in October.

Our annual fall conference and luncheon, Aging Your Way, featured a panel of MythBusters moderated by WDOK radio personality Terry Moir, left, with Mina Kulber, the late Bill "Smoochie" Gordon, Cris Branche and Steve Bullock. The event was held in October at the Hilton Garden Inn.



Above, from left, BRI Vice President for Research David Bass, PhD, presenters Harvey Sterns, PhD, and Ronni Sterns, PhD, with Carol Whitlatch, Assistant Director of Research, at the fall conference in October.



At left, Farida Ejaz, PhD, of BRI's Margaret Blenkner Research Institute, presents on the Aging Strategic Alignment Project (ASAP) at the fall conference.



WTAM radio personality Bill Wills, above, acted as master of ceremonies for our Centennial Gala Celebration on October 25, 2008 at the Union Club.

At right, President/CEO Richard Browdie raises a toast to BRI's 100th anniversary at our Centennial Gala Celebration.



U.S. Assistant Secretary for Health and Human Services Josefina Carbonell, right, spoke at the BRI Annual Meeting in May 2008. Also pictured here, Emeritae Board Members Shirley Gibson and Mary Groves.



Above, social historian W. Andrew Achenbaum, PhD, of the University of Houston was the guest speaker for the Second Annual Katz Policy Lecture in September.

Below, former BRI President/CEO Alice Kethley, PhD, left, chats with guest Courtney Baird at our Centennial Gala Celebration.



## Reducing Disability

The U.S. Administration on Aging (AoA) awarded a grant to the Ohio Department of Aging to replicate the program *Reducing Disability in Alzheimer's Disease* (RDAD). This three-year project will be conducted in partnership with ODA, the Alzheimer's Association — Northwest Ohio Chapter, and the Margaret Blenkner Research Institute of Benjamin Rose. RDAD is an evidence-based program created by Linda Teri and colleagues at the University of Washington. The program provides exercise training for community-dwelling individuals with dementia, combined with training for their caregivers on how to manage behavioral symptoms of dementia. RDAD is intended to improve the functional ability of the person with dementia, decrease his or her frailty and reduce the behavioral impairment associated with the disease. Staff from MBRI will lead the evaluation of the program.

# findings

MARGARET BLENKNER RESEARCH INSTITUTE

## MBRI Research Interns

Summer 2008 saw an influx of students participating in research at the Margaret Blenkner Research Institute. As part of our commitment to the community and the field of aging, MBRI provides students with a first-hand experience in a multidisciplinary environment working on diverse tasks involved in applied aging research. Even during the academic year, students gain research experience with MBRI staff. For example, last summer Cleveland State University students Ellen Bronder, Andrew Isaacs and Genevieve Long continued work they began during the academic year. Before beginning the counseling psychology doctoral program at the University of Akron, Ellen spent part of her summer working with the Project Assist team. Andrew continues to work as a part of the Partners in Dementia

Care (PDC) study while in his second year in the Experimental Psychology program at Cleveland State. Genevieve, who is working on her master's degree in health sciences, helped with the Wellness Network project.



Summer intern  
Ellen Bronder

Veronica Chasser and Stephanie Schroth, undergraduate students from Miami University, also participated in various research activities over the summer months. In particular, Veronica assisted with the Encore Campus in the City evaluation, and Stephanie worked with research staff on the policy relevance and translation of research findings.

## How States Help Seniors Stay Home

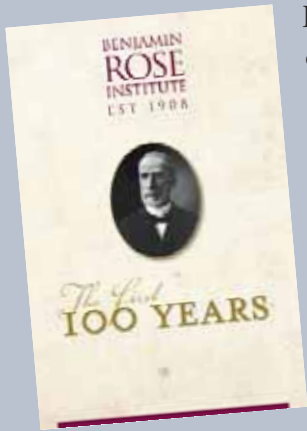
States vary widely in the types of home- and community-based services they offer, the number of programs they offer (ranging four to 14), and in the funding sources they use. Those are some of the preliminary findings of a study conducted by staff of the Katz Policy Institute and Margaret Blenkner Research Institute.

The data are being gathered as part of the Aging Strategic Alignment Project, a cooperative agreement between the U.S. Administration on Aging and the Benjamin Rose Institute. Information is being collected through interviews with key informants designated by the directors of State Units on Aging (such as the Ohio Department on Aging). To date, 49 states have responded.

The current data suggest that close collaboration between a state's unit on aging and its Medicaid unit promotes operational efficiencies. Some states have tackled this directly by establishing a consolidated agency and/or a unified budget for long-term care. Results from the state profiles and comparative analysis will be used to inform state planning and infrastructure development for home- and community-based services, to develop models of innovative approaches for shared learning, and for education and advocacy purposes.

## The First 100 Years

The Benjamin Rose Institute commissioned local writer Eileen Beal to research and write a commemorative history book to celebrate our 100th anniversary in 2008. The book, *Benjamin Rose Institute: The First 100 Years*, examines the Institute's impact on the field of aging and its adaptation to changing needs among the older adult population. A companion piece celebrating the many contributions of Benjamin Rose's Distinguished Scholar Sidney Katz, MD, was also published.



For information on obtaining a copy of *Benjamin Rose Institute: The First 100 Years*, call Jeanne Hoban at 216.373.1686.

## BRI Wellness

The Benjamin Rose Institute received a \$1,000 mini-grant from the Healthy Cleveland Business Council in 2008. The grant is being used to offer incentives and programs to BRI home health aides participating in the Employee Wellness Program.

The BRI wellness program for all employees kicked off in 2008 with a health fair. Baseline measures of weight, blood pressure and other wellness indicators were gathered individually. Employees had the opportunity to enter their information into a confidential electronic

system allowing them to track their individual progress over time. Each month employees who continue to participate are entered into a drawing for prizes provided by Jason and Bill Coleman of Managed Care Consultants.

Participants earn points for activities such as drinking four glasses of water each day, enjoying healthy snacks, limiting caffeine intake, and using the stairs instead of the elevator. Since the program began, employees participating online have logged 7,989,177 steps!

---

## South Pointe Giving Tree

A heartfelt thank you to the staff of South Pointe Hospital, which sponsored a holiday giving tree in December 2008 to benefit the clients of BRI's Mental Health Program.

BENJAMIN  
ROSE  
INSTITUTE  
EST 1908

Benjamin Rose  
**today!**  
CARING FOR OLDER ADULTS... AND THOSE WHO CARE FOR THEM

### Administration

11900 Fairhill Road, Suite 300  
Cleveland, Ohio 44120-1053  
216.791.8000 fax: 216.373.1816  
[www.benrose.org](http://www.benrose.org)