DEAR FRIENDS,

2011 saw the beginning of many plans for government strategies to reign in the growing costs of health and long-term care and services in Ohio and across the country. These changes in policy will affect the Benjamin Rose Institute on Aging (BRIA) and all organizations that provide services to older adults, persons with disabilities, and their caregivers, especially those with low incomes.

These policy directions have been taking shape for a long time. The Affordable Care Act, signed into law in 2010, has stimulated and advanced the development of these strategies, setting the stage for 2012 and 2013 to be a period of tremendous, even disruptive, change. BRIA has been actively involved in policy analysis and in advocacy discussions at the state and national levels, frequently on behalf of other providers and organizations in the Long-Term Services and Supports field. The coming years will require us to continue our advocacy efforts in Columbus and Washington, DC to ensure that changes to the “system” do not disrupt or impede access to high quality services for our most vulnerable citizens. These efforts will be particularly important in connection with the plan of the Ohio Office of Health Transformation to implement managed care for all adults eligible for both Medicaid and Medicare, including all forms of long-term services and supports.

On the state and local levels, 2011 brought extreme changes in levels and methods of funding for mental health services. As one of the few mental health providers exclusively serving older adults in their homes, we have been working diligently to ensure that their needs are met. Indeed, all program areas were challenged by budget reductions. This required us to provide services while trying not to increase our dependence on trust resources, which were being shrunk by the nation’s stubborn economic problems. This commitment led to good operating results.

There is another development impacting BRIA’s future that began in 2011 and will find its conclusion in 2013. Consistent with the provisions of the 2005 leasing agreement with Kindred Healthcare, the sale of our former nursing home was completed in April 2012. This returned the building to its original purpose of providing inpatient care. This transaction enables BRIA — for the first time, at the age of 105 — to move into a dedicated headquarters. Our new home, being constructed at 11890 Fairhill Road, confirms BRIA’s commitment to the City of Cleveland. It also will support our historic mission of developing and managing innovative long-term services and supports, conducting research that further improves our understanding of services for older people and the policies that make better services possible, and sharing our work here and across the country.

This time next year, we hope to invite you all to join us for a grand opening celebration in our new headquarters.

Richard Browdie  
President/CEO

Kathryn Kaesberg  
Chairperson, Board of Directors

OUR MISSION
TO ADVANCE THE HEALTH, INDEPENDENCE, AND DIGNITY OF OLDER ADULTS.
SIDNEY KATZ
1924-2012
The Benjamin Rose Institute on Aging is deeply saddened by the loss of a great colleague, friend and mentor, Sidney Katz, MD.

Until last year, when he moved to Michigan to be closer to family, Dr. Katz served as BRIA’s Distinguished Scholar, a position he held for more than 20 years. His connections to the organization go back much further. In the 1950s, Dr. Katz led a team of researchers at the Benjamin Rose Hospital in the development of the Index of Activities of Daily Living, which remains one of the most commonly used tools for determining function in older adults around the world.

ESI BY THE NUMBERS
The Eldercare Services Institute of Benjamin Rose continued to provide high quality service and assistance to older adults and their caregivers throughout 2011. The majority of clients were women (70%); and about half were Caucasian (48%) or African American (44%).

The Social Work Program provided case management, counseling and other social services to 284 clients. The Mental Health Program provided service to 393 adults aged 55 and older who are living with mental illness. ESI Home Care provided skilled nursing to 238 clients and personal care and other home-based services to 289 clients. The Adult Day Program served 74 clients with therapeutic and social activities. The Partial Hospitalization Program (East and West) provided group therapeutic activities for 53 clients aged 55 and older who are living with mental illness.

Sixty volunteers in the Senior Companion Program provided 37,349 service hours in 2011.

COMMUNITY FORUMS PROVIDE POLICY INSIGHTS
The Katz Policy Institute of Benjamin Rose hosted several community forums throughout 2011. The events brought together policy makers, researchers, academics, students and the general public to focus on important policy issues.

On March 29, Roland Hornbostel, Deputy Director of Programs and Policy for the Ohio Department of Aging (ODA), discussed Balancing the Long-Term Services-and-Supports System in Ohio, providing information on Ohio’s goals to rebalance long-term services and supports, the creation of the Office of Health Transformation, and ODA’s emphasis on person-centered care.

Bonnie Kantor-Burman, Director of the Ohio Department of Aging, presented a follow-up program on July 27. She addressed the Ohio Department of Aging’s Plans to Advance Ohio’s Aging Network, sharing ODA’s plans for changes to PASSPORT and the AAAs, as well as ODA’s vision for Ohio’s Aging Network.

CONTINUED ON PAGE 4
YEAR IN REVIEW

Medicare Part D: Helping Beneficiaries to Make the Right Choices in 2012 was the topic of a September 30 community forum with presenters Semanthie B. Brooks, MSW, LISW, BRIA’s Director of Community Advocacy, and Lee Fisher, BS, Supervisor of the Benjamin Rose Medicare and Benefits Enrollment Center. Brooks and Fisher shared updated information on policies and practices affecting the Medicare Part D benefits and how benefits are accessed.

Mark Salling, PhD, GISP, from the Northern Ohio Data & Information Service (NODIS) and the Levin College of Urban Affairs at Cleveland State University, provided an Update on Demographic Changes in Northeast Ohio’s Older Adult and Adult Disabled Populations on October 11.

MINORITY HEALTH

It’s sometimes difficult to separate myth from reality when it comes to understanding diabetes and other chronic health issues. To help shed light on the subject, BRIA’s ElderCare Services Institute presented two ‘train-the-trainer’ programs for seniors as part of Minority Health Month in April 2011.

Diabetes... and the Kidneys Too provided older adults with accurate and accessible information on diabetes and kidney health to share with their peers. Presenters included Joann Mraz of the American Diabetes Association (ADA), Jeff Schelling, MD of the Kidney Foundation of Ohio, Darlene Mason and Dale Hemphill of Community Dialysis Care, and puppeteer Binnie Tufts.

The free programs were funded by the Ohio Commission on Minority Health.

MENTAL HEALTH PROGRAM RECOGNIZED

The Mental Health Program of the ElderCare Services Institute of Benjamin Rose was recognized in 2011 at the Case In Point Platinum Awards, sponsored by Dorland Health/Media Communications. The Mental Health Program earned an honorable mention in the Case Management Provider Program category at the annual awards. The Mental Health Program was one of five finalists in the category from across the country. The awards, presented at the National Press Club, recognize the most successful and innovative case management programs working to improve health care across the care continuum.

The Mental Health Program of Benjamin Rose is a CARF-certified provider of case management and other behavioral health services for older adults. It is the only mental health program in the area dedicated solely to seniors with mental illness.

SPRY FOUNDATION

The SPRY Foundation (Setting Priorities for Retirement Years), one of Washington, DC’s most innovative nonprofit organizations for older Americans, became part of the Benjamin Rose Institute on Aging in 2011. The work of the SPRY Foundation has traditionally focused on helping people remain active and socially connected in their later years. BRIA President and CEO Richard Browdie will continue to serve as Chairman of the SPRY Board of Directors.

SPRY will retain its 501(c)3 status with support from BRIA.
OHT DIRECTOR MOODY AT 2011 ANNUAL MEETING

Greg Moody, Director of the Ohio Office of Health Transformation (OHT), was the guest speaker at BRIA’s 2011 annual meeting at the Cleveland Skating Club. Moody was appointed by Governor John Kasich in January 2011 to head OHT, which is responsible for advancing the governor’s Medicaid modernization and cost-containment priorities.

Moody discussed the role of OHT in responding to challenges in the delivery and funding of health services.

SR. VP SELECTED FOR OHIO WOMEN’S HALL OF FAME

Linda S. Noelker, PhD, BRIA Senior Vice President of Planning and Organizational Resources and Director of the Katz Policy Institute, was inducted into the Ohio Women’s Hall of Fame in August 2011.

The Hall of Fame honor is given in recognition of tremendous accomplishments, commitment to excellence, and service to others.

Dr. Noelker was one of nine honorees inducted in this ceremony at the Ohio Statehouse.

The Hall of Fame induction is the latest in many accolades Dr. Noelker has earned throughout her career. Other honors and awards include: Distinguished Career Contribution Award from the Gerontological Society of America, Leadership Award from the American Society on Aging, the Visiting Nurse Association Distinguished Women in Healthcare Award, the Menorah Park Center for Aging Arnold L. Heller Memorial Award, the English Speaking Union of NYC Winston Churchill Traveling Fellowship, and others.

BRIA STAFF CHOSEN TO LEAD AGING ORGANIZATION BOARDS

During 2011, three members of the BRIA staff assumed board leadership roles at aging organizations.

BRIA President and CEO Richard Browdie was elected to a three-year term as chairman of the Board of Directors of the National Council on Aging, a nonprofit service and advocacy organization headquartered in Washington, DC. Browdie has served on the NCOA board since 2008. He replaced Msgr. Charles Fahey of Fordham University as chair.

Linda S. Noelker, PhD, Senior Vice President of Planning and Organizational Resources at the Benjamin Rose Institute on Aging (BRIA), was recently elected president of the Board of Directors of the National Center for Creative Aging (NCCA). Dr. Noelker replaces Tobi Abramson, PhD, who was instrumental in establishing NCCA in its new home as an affiliate of George Washington University.

Heather L. Menne, PhD, Senior Research Scientist in the Margaret Blenkner Research Institute of Benjamin Rose, is the new President-Elect of the Ohio Association of Gerontology and Education (OAGE). Dr. Menne will serve as OAGE President for a two-year term beginning in 2013.
STATE MENTAL HEALTH DIRECTOR DELIVERED POLICY LECTURE

Tracy Plouck, Director of the Ohio Department of Mental Health, delivered the Katz Policy Lecture on September 23, 2011.

Director Plouck discussed ODMH’s plans for the delivery and quality of mental health programs for older adults in the state.

APARTMENTS EXPANDED

BRIA’s latest housing project, Margaret Wagner Apartments II, received approval from the U.S. Department of Housing and Urban Development (HUD) in 2011 to renovate the second and third floors of the former nursing home, Margaret Wagner House, into 36 one-bedroom HUD Section 202 Supportive Housing for Seniors apartments. The $4.3 million renovation, with lead architect David DiFrancesco along with Joanne Gretter of Herman Gibans Fodor, Inc. and the general contractor Marous Brothers Construction, was completed in late fall.

BRIA continues to manage 24 HUD Section 202 senior apartments on the fourth and fifth floors of Margaret Wagner House.

SHARE PROGRAM

Research shows that staying active and planning for the future may help families who are dealing with memory loss. The SHARE Program – Supporting Health, Activities, Resources and Education, was developed by researchers at the Benjamin Rose Institute on Aging (BRIA) and Pennsylvania State University to help persons with early-stage dementia and their caregivers. SHARE, which began recruiting participants in 2011, helps families learn more about memory loss and the symptoms that accompany it, improves overall communication skills, and prepares families for the changes that lie ahead. Persons in the early-stages of memory loss, who live in the community, and their family caregivers are eligible to participate. Families in SHARE participate in up to seven sessions over a six-month period.
OTHER MBRI FUNDED PROJECTS FOR 2011

Alzheimer’s Association Chapters and Partners in Dementia Care
A controlled trial testing the effectiveness of care consultation delivered via a partnership between Alzheimer’s Association chapters and VA medical centers.

Benjamin Rose Institute on Aging Care Consultation Programs
Refines BRI Care Consultation and investigates how organizational and community characteristics influence the feasibility of implementing this evidence-based program in the local Cleveland community.

Partners in Dementia Care for Veterans with Dementia and Their Family Caregivers
A controlled trial testing the effectiveness of the Care Coordination Program to improve psychosocial, utilization and cost outcomes for veterans with dementia and their family caregivers.

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

Home Health Care CAHPS Survey
Administering the federally mandated consumer satisfaction surveys for adults using Medicare and Medicaid home health services.

Tennessee Replication of Care Consultation
Tests the effectiveness of BRI Care Consultation delivered by the Eastern Tennessee Chapter of the Alzheimer Association to Humana health plan members with dementia and their family caregivers.

Evaluating the Rewarding Education through Advanced Careers in Healthcare (REACH) Intervention
An evaluation of an intervention to enhance training, career ladders, and job satisfaction, and reduce job turnover of staff in long-term care settings.

The Experiences of Human Services Organizations with Older Workers, Volunteers and Senior Community Service and Employment Program (SCSEP) Participants in Seven States
Survey of human service organizations in seven states regarding their knowledge and use of SCSEP participants, volunteers and older workers.

Examining Turnover of Direct Care Workers in Ohio’s Long-Term Care Industry
This study will develop and test a standardized method for collecting turnover data from adult day care centers, assisted living facilities, nursing homes, and home health agencies in Ohio; and will examine factors related to turnover.

Reducing Disability in Alzheimer’s Disease in Ohio
A replication study of an evidence-based program delivered by Alzheimer’s Association Chapters in Ohio that teaches exercises to older adults with dementia and care techniques to their family caregivers.

Ohio’s Statewide Expansion and Advancement of the “Reducing Disability in Alzheimer’s Disease” Program
The statewide expansion and advancement of the “Reducing Disability in Alzheimer’s Disease” Program to explore alternative delivery models and options for sustainability.

Home Health Aide Implementation of “Reducing Disability in Alzheimer’s Disease” Program
A feasibility study to test the viability of home health aides implementing the “Reducing Disability in Alzheimer’s Disease” Program, an evidence-based program that teaches exercises to older adults with dementia and care techniques to their family members.

Evaluation of Early Stage Programs
An evaluation of social and recreational programs offered by the Northwest Ohio Chapter of the Alzheimer’s Association to families dealing with the early stages of dementia.

Early-stage Partners in Care: The EPIC Project
Examines the feasibility of adapting an early-stage dementia counseling program for use in support groups with family caregivers and persons with dementia.

Empowering Elders by Enhancing Cognitive Health Outcomes: The ECHO Program
Tests the impact of counseling techniques and computer-based brain fitness exercises to help individuals with memory loss and their family caregivers stay mentally active, and improve their communication and well-being.
AGING YOUR WAY
The Benjamin Rose Institute on Aging hosted its annual Aging Your Way Conference and Luncheon on November 2, 2011, at the Hilton Garden Inn in downtown Cleveland. The conference focused on Transitions in Caregiving. Keynote speaker Joseph Gaugler, PhD, University of Minnesota spoke on Interventions and Key Transitions in Dementia Caregiving.

The luncheon featured a panel of MythBusters — adults 65 and older who defy the myths of aging. Panelists included Christine Branche, community activist and volunteer; Senator Grace Drake, director of the Ohio Center for the Advancement of Women in Public Service at Cleveland State University; George Forbes, founding partner of Forbes, Fields & Associates Co., LPA; and Fred Griffith, co-host of Good Company on WKYC-TV3. Moderator broadcaster Terry Moir led the panel through a discussion of life transitions.

The 2012 conference is planned for November 9 at the Bertram Inn and Conference Center.

CELEBRATING CAREGIVER CREATIVITY
The first Innovation in Caregiving Awards were presented at the Aging Your Way conference. Three award winners each received a commemorative plaque and a check for $1,000.

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

Applications for the 2012 awards are being accepted at www.benrose.org through June 30, 2012.

Three devices created by family caregivers were selected to receive the inaugural Innovation in Caregiving Awards:
• Foam Booster for Positioning in Bed, submitted by Karen Exl
• Elevated Toilet Seat Lid, submitted by Denise Rosenbaum
• Bed Platform Riser, submitted by Richard Fortenbaugh
NORTHEAST OHIO LIFESPAN RESPITE SUMMIT
BRIA teamed up with Montefiore and the Ohio Department on Aging to offer the Northcoast Ohio Lifespan Respite Summit in November 2012.

The networking and information-gathering event drew more than 100 people interested in respite for caregivers of children, adults and elders with disabilities or other special needs.

The event was held in partnership with the Ohio Respite Coalition

Presenters and panelists discussed the definition and benefits of respite, and families shared their stories and experiences with respite (or the lack of respite). The summit is part of a national effort to advocate for adequate and affordable respite options across the lifespan.

HELPING CONSUMERS ACCESS BENEFITS
The BRIA Medicare and Benefits Enrollment Center helps older adults to understand and access the benefits available from more than 1,300 federal, state and local public benefit programs in addition to helping Medicare beneficiaries to understand the Medicare Part D program.

In 2011, the Center conducted 1,628 counseling episodes, with 116 enrollments in Medicare Part D prescription drug plans and low-income subsidies. In one case, a client saved $62,206 by changing his Medicare Part D plan for 2012. Benefit screenings resulted in 265 seniors accessing $246,832 in available benefits.

The Center is part of the Aging and Disability Resource Network, which launched in October 2011 and is coordinated by the Western Reserve Area Agency on Aging.

Architectural composite of the BRIA headquarters scheduled to open in Spring 2013.

NEW HEADQUARTERS PLANNED
In November 2011, Kindred Hospitals of Cleveland notified BRIA that Kindred would exercise its option to purchase Kethley House, as specified in the company’s 2005 lease agreement. The sale was finalized in April 2012.

In spring 2012, BRIA broke ground on its new headquarters, which is expected to be completed by spring 2013. In the meantime, staff from ElderCare Services Institute will be housed at 11811 Shaker Blvd. Staff in Administration, Finance, Katz Policy Institute, Margaret Blenkner Research Institute and the Senior Companion Program will remain in offices at Kethley House.

VOLUNTEERS

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Deloris Allen
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Gwendolyn Blakenly
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Louise Cartwright
Shirley Cockrell
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We have made every effort to ensure the accuracy of this list. If you have any corrections, please call our Institutional Advancement Office at 216.373.1607.
1908 LEGACY SOCIETY

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

If you have questions about becoming a Legacy Society member, or if you have made provisions for the Benjamin Rose Institute on Aging in your estate plans but do not see your name listed, please contact Kerry Wray at 216.373.1607 or kwray@benrose.org. We would like to honor your commitment and dedication to Benjamin Rose. All Legacy Society members are invited to special events throughout the year.

Anonymous (5)
Margaret Barnes*
Aloise O. Bates
Polly Clemo
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FUNDING SOURCES

GRANTS
Alzheimer’s Association
Alzheimer’s Association, Northwest Ohio Chapter
Arizona State University
The Cleveland Foundation Corporation for National and Community Service
The Edwin T. and Mary E. Hamilton Fund
The Norma Witt Jackson Fund
Jennings Center for Older Adults
Johnson & Johnson/Rosalyn Carter Institute Caregivers Program, Georgia Southwestern State University
Ohio Department of Aging
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

ELDERCARE SERVICES
Aetna
Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County
Anthem Senior Advantage
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
In-Kind Donations
McGregor
McGregor PACE
Medicaid
Medicare
Ohio Department of Aging
Older Americans Act
Plain Dealer Holiday Spirit Campaign
United Healthcare
Western Reserve Area Agency on Aging (PASSPORT)

MARGARET WAGNER APARTMENTS
Tenant Fees
U.S. Department of Housing and Urban Development
FINANCIALS 2011

**Sources of Program Support***

$11,368,000

- Income from Trusts 34.7%
- ElderCare Services Institute, LLC Reimbursement 30.2%
- Benjamin Rose Property, LLC Income 16.6%
- Contributions and Grants 11.7%
- Interest and Dividends* 3.0%
- Margaret Wagner Apartments 2.5%
- Other income 1.3%

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

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

**Costs of Program Services**

$11,905,000

- ElderCare Services Institute, LLC 44.8%
- Administration and Support 17.9%
- Margaret Blenkner Research Institute 14.7%
- Benjamin Rose Property, LLC 9.9%
- Katz Policy Institute 5.1%
- Fund Raising and Marketing 4.4%
- Margaret Wagner Apartments 3.2%
MANAGEMENT STAFF

BENJAMIN ROSE  
CAMPUS LOCATION  
11900 Fairhill Road, Suite 300  
Cleveland, OH 44120-1053  
216.791.8000

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Heather L. Menne, PhD  
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Carol J. Whitlatch, PhD  
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EUCLID HEIGHTS  
BOULEVARD LOCATION

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

Rosalind Mitchell  
Housing Manager

ADULT DAY PROGRAM/PARTIAL HOSPITALIZATION PROGRAM

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

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

Linda Elliott, PhD, MSSA, LISW-S, ATR-BC, CNM, CPM, RMT  
Director, Adult Day and Partial Hospitalization Programs

SHAKER WEST  
LOCATION  
11811 Shaker Boulevard  
Cleveland, OH 44120  
216.791.8000

ELDERCARE SERVICES INSTITUTE, LLC  
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Vice President & COO

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Project Director/Administrator, Senior Companion Program

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