Advance Support for Older Adults and Caregivers

Our Mission
CONNECT TO OUR COMMUNITY!

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Dear Friends:

2015 was quite a year, for Benjamin Rose Institute on Aging and for all who work in the field of serving older people in Northeast Ohio and nationally. Here in Ohio, the emergence of managed care continued to bring change to our environment and to our agency, and as local funders continue to change their priorities, there have been additional ripple effects on nonprofit organizations in the aging field.

The promise of health care reform bringing new partnerships into being at the community level remained a “work in progress”. Greater Cleveland continues efforts to manage the paradox of accelerating civic and economic development through its leading institutions, while low and moderate income residents continue to struggle. What is undeniable is that the number of older people in our community continues to grow. While one would assume they would benefit in the broader economy, a greater proportion are finding their own resources unequal to meeting the costs of their needs in later life.

Benjamin Rose provides leadership both locally and nationally in the work of the meeting the needs of older adults and their caregivers. Two examples of our work in 2015 demonstrate our commitment. Prior to the July 2015 White House Conference on Aging in Washington, DC, Benjamin Rose convened a community forum with leaders and representatives from a wide range of greater Cleveland organizations. At the forum, representatives heard from national and local experts in the aging field and shared their experiences relevant to the White House Conference topics. A summary of the discussion at the Cleveland area forum was provided to organizers of the White House Conference. Also in 2015, Benjamin Rose reached further into the local community through the senior center and home-delivered meal operations of Rose Centers for Aging Well, and led the initiative to respond to a crisis in East Cleveland ensuring homebound seniors would receive meals and seniors would have a center location for meals, educational programming and wellness programs.

Change is the “new normal” we now face on a regular basis. Aging service organizations have been traveling through an arc of systems change that began in 2002 and has been accelerating since 2012. The velocity of change, however, is likely to increase.

Our strategic plan for 2016 -2020, outlined at the end of this report, anticipates finding new ways to deliver high-quality solutions for older adults of Northeast Ohio and beyond, to develop sustainable approaches that reach new customers, to develop partnerships with compatible organizations when opportunities arise, and to be of service to our colleagues in the Aging Network when we can. Through these efforts we will address the ever-growing needs of older adults and their caregivers. In this time of change, Benjamin Rose remains committed to the core of its mission to advance support for older adults and caregivers, even as our means of pursuing it adapt and adjust.

Sincerely,

Richard Browdie
President & CEO

Elizabeth F. Stueber
2015 Chairperson of the Board of Directors
The Helen S. Brown Center, the only publicly funded senior center in East Cleveland, closed its doors after years of financial struggles at the end of December 2014. Immediately, the Rose Centers for Aging Well home-delivered meals program stepped in to deliver hot meals to the homebound residents of East Cleveland who had no one left to serve them.

At the same time, a number of agencies began a week-by-week process of trying to come up with a workable and, more importantly, sustainable solution. Benjamin Rose Institute on Aging and Rose Centers — still settling in after being created out of a union between Benjamin Rose and the Golden Age Centers of Greater Cleveland — were asked to step in and re-establish a senior center program for East Cleveland’s seniors.

After a number of fits and starts, leading organizations stepped forward in the spirit of partnership to make something happen. First in line was the Reverend Shawn Braxton and New Life Cathedral. Already a major hub of activity in the fabric of East Cleveland, Pastor Braxton and his congregation prepared to open their doors further to the Rose Centers and the seniors of their community.

New programs require preparation and while services can be made more efficient, services are not free. A range of organizations stepped forward to do what they could with the resources they had. Providing new leadership and support to this challenge was Third Federal Foundation, with a grant for essential capital expenditures and transitional operating assistance. The Western Reserve Area Agency on Aging, a long-time funder of the Helen S. Brown Center, agreed to have the money set aside previously re-programmed for the center’s use, and then found some additional resources to assist even further. The McGregor Foundation agreed to allow Rose Centers to re-purpose funds from other planned uses to support the new center, and Benjamin Rose found money to re-allocate from another use to support this essential project. In addition, the City of East Cleveland donated equipment to the new center, and has committed to doing what it can to support the center serving its citizens.

The result? The center is operating and growing faster than its resources can support. In this business, it doesn’t get much better than that.
The Benjamin Rose Institute on Aging received a $290,000 grant from The Cleveland Foundation in March 2015 to design a new service-delivery model for the Rose Centers for Aging Well. This impactful grant enables Benjamin Rose to develop innovative, cost-effective strategies and supports for the former Golden Age Centers, to help older adults age in their own homes and the community. Specific goals for the new model include increasing the number of older adults served at Rose Center sites and other city locations and expanding the range of services and supports that promote health and wellness.

Many important activities related to the new model occurred in 2015:

- Benjamin Rose research staff reviewed demographic and other data to inform the design process.
- Researchers interviewed older adults participating in Rose Center programs to better understand their needs and preferences.
- A team of national experts in the fields of community-based aging services and senior centers visited the Rose Centers.
- The consultants developed recommendations regarding future directions for the Centers and community-based programs for older adults.
- The Rose Centers for Aging Well emerged with a new strategic plan and a purpose to promote successful aging for Northeast Ohio’s adults by offering opportunities, programs and services that foster choice and independence.
- Development of an enhanced technology platform is an essential foundation for the new service delivery model. Currently in prototype development, the platform will introduce efficiencies into service delivery and contain data that will enable Benjamin Rose and Rose Centers staff to more readily connect older adults with services they want and need.

Additionally, two new programs are now delivered through the Rose Centers: the Aging Mastery Program (AMP), a 10-week program from the National Council on Aging, and the Heart Health Program, developed by Benjamin Rose researchers. AMP is being delivered in collaboration with the Cleveland Department of Aging at several Rose Centers and City of Cleveland recreation center locations. Both programs have been well-received by participants and planning is underway to promote these programs across the Rose Centers and other senior service organizations.

The Cleveland Foundation grant has allowed Benjamin Rose to invigorate Rose Centers operations and move toward a model for delivering senior services that can be shared with other older adult organizations.

RE-ENGAGING WITH THE WORLD THROUGH THE ARTS

Artists aged 50 and older participated in a two-day Encore Artists training to learn how to apply their skills when working with an older adult population at the Benjamin Rose Institute on Aging headquarters in May and June 2015. The Encore Artists program was designed to expand the availability of visual and performing arts activities to older adults currently without or with limited access to the arts.

The Encore Artists program was funded by The Cleveland Foundation as part of its Encore Cleveland initiative, which helps to connect and fund a network of organizations to provide experienced Greater Clevelanders with an array of meaningful opportunities in the community. Additional funding support for the development of the training curriculum was provided by the Ohio Arts Council, utilizing online content from the National Center for Creative Aging, which shares the curricular materials developed as part of the program on its website, www.creativeaging.org. Research shows older adults experience improved health and quality of life by participating in professionally led arts programs. The Encore Artists program enables participants to experience those benefits, while at the same time, helping the participating artists begin Encore careers.

Following the training at Benjamin Rose, artists were matched with host sites, which included nonprofit and public senior centers, recreation centers, senior housing sites, adult day programs, nursing homes and assisted living facilities located within the city of Cleveland. The participating artists provided programs for 400 seniors throughout Cleveland.
The Benjamin Rose Institute on Aging hosted a day-long symposium on April 14, 2015 in anticipation of the Cleveland regional forum of the White House Conference on Aging (WHCoA) held later that month.

The symposium enabled invited leaders in the fields of aging and human services to examine the issues — elder justice, health and wellness, long-term care systems, and income security. Through this process, Benjamin Rose and its partners developed recommendations for national policy to send to the WHCoA, informed by local and state experiences.

The forum was presented in collaboration with the Western Reserve Area Agency on Aging (AAA-10A); Direction Home (AAA-10B); and Area Agency on Aging, District 11.

The program included keynote presentations by:

- **Cheryl Phillips**, Senior Vice President, Public Policy and Advocacy, LeadingAge

Each presentation was followed by a panel discussion moderated by President & CEO Richard Browdie.

Panelists included:

- **Roslyn Quarto**, JD, Executive Director, Empowering and Strengthening Ohio’s People (ESOP)

- **Robert E. Eckardt**, DrPH, Executive Vice President, The Cleveland Foundation

- **Georgia Anetzberger**, PhD, ACSW, Member, Advisory Council, National Center on Elder Abuse; Immediate Past President, National Committee for the Prevention of Elder Abuse

- **Michael Tobin**, Community & Public Affairs Specialist, United States Attorney’s Office for the Northern District of Ohio

- **R. Robertson Hilton**, DM, President & CEO, McGregor

- **Semanthie Brooks**, ACSW, LISW, Director of Community Advocacy, Benjamin Rose Institute on Aging

- **Stephanie J. FallCreek**, DSW, President & CEO, Fairhill Partners

- **Lori Lozier**, MSSA, LISW-S, LNHA, CHPCA, Director of Geriatrics, Palliative Care and Post Acute Care, University Hospitals

**BROWDIE DELEGATE TO WHITE HOUSE CONFERENCE**

Richard Browdie, President & CEO of the Benjamin Rose Institute on Aging, was a delegate to the 2015 White House Conference on Aging. Browdie was one of only 200 delegates from around the country to receive an invitation to the WHCoA held in Washington, DC on July 13, 2015.

“It is an honor to be selected as a delegate to the White House Conference on Aging,” said Browdie. “America faces many issues that result from the growing presence of older people in our increasingly diverse nation. In some ways, our society will have new assets we need to learn to engage. In other ways, our burdens to provide care may grow. This is an opportunity to contribute to the dialogue nationally, and at the same time assure that the needs of Northeast Ohio’s older adults and caregivers are considered as a part of the national discussion.”
The 9th Annual Katz Policy Lecture at the Benjamin Rose Institute on Aging explored the impact of Meals on Wheels and other home-delivered meal programs on health outcomes for individuals as well as the policy impact on states.

Kali S. Thomas, PhD, of Brown University delivered the lecture on Wednesday, October 14, at the Conference Center at Benjamin Rose.

A recent study by Dr. Thomas and her colleagues at Brown found that home-delivered meals improve the health and well-being of older adults, particularly those who receive daily-delivered meals and those who live alone. Her earlier research showed that when states invest in home-delivered meals, older adults with low-care needs are able to avoid costly nursing home placement.

Locally, the home-delivered meal program of the Rose Centers for Aging Well, a subsidiary of Benjamin Rose, serves more than 1,100 seniors each year with 178,334 meals delivered in 2015. Many of the older adults served would be unable to remain in their homes without home-delivered meals and other supportive services.

The Katz Policy Lecture is held annually in memory of the late Sidney Katz, MD, who was Distinguished Scholar at Benjamin Rose.

**SAVE THE DATE:**
October 20, 2016, for the 10th Annual Katz Policy Lecture

Speaker: Michael Adams, JD, MA
CEO, SAGE USA

Topic: Policy issues impacting LGBT older adults

The 9th Annual Katz Lecture Shares Positive Impact of Home-Delivered Meals

Richard Browdie, President and CEO of the Benjamin Rose Institute on Aging, received the 2015 M. Powell Lawton Quality of Life Award from the Philadelphia Corporation for Aging (PCA) at its Regional Conference on Aging, which was held October 19-21.

Browdie delivered a keynote address at the conference on The Future of Aging Services.

“Powell Lawton was a great man in many ways. I had the good fortune to be able to spend time with him, and his generosity with his insight, wisdom and grace with the young professional I was, despite his great accomplishments in the field, always remained with me,” said Browdie. “Together with his colleague and friend Sidney Katz, they were the architects of the intellectual foundation for how we think about the need for long-term services and supports for older people and younger people with disabilities around the world.”
The 2015 caregiving conference — “Empower Family Caregivers: Approaches to Managing Mental Illness and Dementia” — focused on the special struggles of caregivers whose loved ones have a diagnosed mental illness or dementia.

The conference was held on Thursday, November 12, 2015, in the Conference Center at Benjamin Rose.

The keynote speaker was Richard Schulz, PhD, University of Pittsburgh, an expert on social-psychological aspects of aging and a recognized authority on the impact of disabling late-life disease on patients and their families. Dr. Schulz discussed *Family Caregiving: Health Effects, Treatments and Future Directions.*

Conference attendees also gained information on working with family caregivers of individuals with mental illness and dementia.

Additional presentations included:

- **BRIA Mental Health Program: Attention to Caregivers**, with Mental Health Director Bert Rahl, MSSA, LISW-S, Benjamin Rose
- **Caring for Families of People with Chronic Mental Health Problems**, with Marsha Mitchell-Blanks, Program Director, National Alliance on Mental Illness, Cleveland Chapter

The program also included a panel discussion moderated by David Bass, PhD, Senior Vice President for Research and Education. Panelists were: Jennifer Miller, Family Service Coordinator, Alzheimer’s Association, Greater East Ohio Chapter; Nadelane Joseph, LSW, Care Coordinator, Family Caregiver Support Program, Western Reserve Area Agency on Aging; and Kim Kinnan, Marketing Director, Arden Courts of Parma.

**INNOVATION IN CAREGIVING AWARD**

The Fifth Annual Innovation in Caregiving Awards were presented at the November caregiving conference, recognizing creative solutions to caregiving challenges. Two winning entries were selected by impartial experts in the field from among many high-quality, innovative entries submitted in this year’s contest.

Each honoree received a winning prize of $1,000.

The 2015 winners were:

- **The Alive Inside Foundation** developed Education Development & Community Bridge Pilot Project, a unique approach using the power of personalized music and empathy training to connect youth and elders.
Sisters Lisa Coleraine (Medina, TN), Joyce Rucker (Madison, TN), and Kathryn Braswell (Virginia Beach, VA) of Penny Trail Express, created the Transport 4 Two double transport chair, which enables a single caregiver to transport two people to a common destination.

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

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Top: Local college students earned scholarships to attend the conference. Below: Innovation in Caregiving Award-winning Transport 4 Two double transport chair.

2015 EDUCATIONAL PROGRAMS

Benjamin Rose Institute on Aging hosted a full range of continuing education programs throughout 2015, including:

- The Deadly Disease of Opiate Addiction
- Ethics: The Fundamental Importance of Client Rights
- Ethics: Making Difficult Decisions
- Ethics: Revisiting the Limits of Client Confidentiality
- Focus on Elder Law
- Geriatric Medications and Medicine
- How to Provide Ethical, Legal & Interpersonal Support to Persons with Dementia & Their Caregivers
- Mental Health and Memory Loss
- Palliative Care 101: How Does It Fit in Health Care Today?
- Practicing on the Dark Side: Ethical Misconduct
- Protecting Older Adults from Financial Exploitation
- Screening and Protocols for Cases of Abuse, Neglect and Exploitation
- Situational Leadership and Supervision
- Transference and Countertransference in the Supervisor-Supervisee Relationship
- Trauma Informed Care
- Working Effectively with the LGBTQ Population
- Working with Severe Hoarders

Visit www.benrose.org/education for a full list of upcoming conferences!
Alzheimer’s Association, Northwest Ohio Chapter: 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.
*Funded by: Toledo Foundation and Alzheimer’s Association, Northwest Ohio*

Caregiver Assessment 2.0
Development of an online caregiver assessment tool for Family Caregiver Alliance, a national leader in innovative approaches to supporting families involved in caring for an ill or impaired relative.
*Funded by: Archstone Foundation*

Dementia Caregiving Network Evidence-Based Profile Project
Development of an online tool to help service organizations and family caregivers learn about and make decisions about using the latest non-pharmacological, evidence-based programs for persons with dementia and their caregivers.
*Funded by: John A. Hartford Foundation*

Developing an Online Training Module on Abuse, Neglect & Exploitation for Care Managers in MyCare Ohio
Creation of three online training modules for professionals to help them recognize and know how to respond to clients or patients experiencing abuse, neglect and exploitation.
*Funded by: Ohio Department of Aging with funds from the U.S. Administration for Community Living, Department of Health and Human Services.*

Elder Abuse Prevention Interventions Program: Texas Adult Protective Service Collaboration with WellMed Medical Management
Trains primary care professionals from an integrated healthcare system in Texas to screen, refer and prevent elder abuse and neglect among older patients.
*Funded by: U.S. Administration for Community Living, Department of Health and Human Services*

Evaluation of APS Emergency Intervention Team
Evaluation of an innovative, multidisciplinary program being implemented by Cuyahoga County Division of Senior and Adult Services to improve Adult Protective Services.
*Funded by: Cuyahoga County Division of Senior and Adult Services with support from the Ohio Department of Job and Family Services*

HEART HEALTH PROGRAM
Seniors from the Ernest J. Bohn and Paul W. Alandt Rose Centers for Aging Well spent the Summer of 2015 learning about heart health, engaging in peer dialogue about their experiences, and building personalized action plans to help them live healthier lives.

The Heart Health Program was developed by members of the research team at Benjamin Rose Institute on Aging, led by Senior Vice President for Research & Education David M. Bass, PhD, and Senior Research Scientist Heather L. Menne, PhD, in cooperation with two community medical professionals and directors of the Rose Centers, which served as the pilot study site. The program was funded by a grant from University Hospitals Case Medical Center Community Benefit Grant Program.

The six-part Heart Health Program, facilitated by Carole Fordham, RN, (pictured, top right) encourages self-sustained heart healthy behavior change in older adults. The premise of the program is for participants to choose individualized, achievable, action steps that require few resources.

Action steps that were accomplished by participants were simple and included tasks like, “I will drink more water,” “I will ask my kids to come walk with me,” or “I will call a friend I haven’t talked to in a while.”

Overall, the participants of the Heart Health Program pilot study reported being highly satisfied with the program and 100% of them said they would recommend the program to other seniors.

Plans are underway to expand the program to other locations.
SHARE—Support, Health, Activities, Resources, Education—is an evidence-informed intervention that involves individuals with dementia and their care partners in decision making and planning. SHARE supports care partners and helps them communicate effectively and plan for the future, while promoting health and well-being, and decreasing stress; encouraging participation in fulfilling activities; learning about available resources; and providing education about dementia and how to manage changes that lie ahead.

In 2014-2015, the SHARE team, led by Carol Whitlatch, PhD, Assistant Director of the Benjamin Rose Center for Research and Education, worked with a Virginia-based company on a Small Business Innovation Research (SBIR) project funded through the National Institutes of Health Commercialization Assistance Program. The SBIR project involved the development of the SHARE for Dementia product line and a study to test its effectiveness with a group of new SHARE counselors. The goals of the project were to create a 9-module online training course for counselors, a SHARE app and print materials for both counselors and families. The SHARE app, designed for use on an iPad, contains the SHARE session tools and a case management system for SHARE counselors.

In total, 19 new SHARE counselors were trained as part of the study. Overall, counselors rated the usefulness of the training course as high and felt that the modules gave them the knowledge, skills and concepts needed to conduct the SHARE sessions. On average, counselors also rated the usefulness of the app as being high. Both the individuals with dementia and their caregivers rated their counselors very high in terms of explaining the goals of the program, meeting the session goals, and in providing high quality and useful information. In addition, families were very accepting of the technology used in the study.

Learn more at [www.benrose.org/SHARE](http://www.benrose.org/SHARE).
**Our Impact on the Community**

**HOME AND COMMUNITY-BASED SERVICES**

206 clients received services in 2015 from Benjamin Rose Social Workers, who also provided assessment services to home-delivered meal clients; psychotherapy services for residents of assisted living facilities; service coordination for Margaret Wagner Apartments; and clinical supervision for service coordinators at six additional senior apartment buildings.

47 clients participated in social and therapeutic activities in the Adult Day Program in 2015. The program also served as a host site for the Encore Artists program, and launched a Caregiver Support Group in December along with a Caregiver Newsletter.

419 clients received Mental Health case management services in 2015. The program continues to be an anchor and driver of the Hoarding Connection of Cuyahoga County.

87 clients received Home Care services in 2015. The program also provided training to Rose Center home-delivered meal drivers on “observation triggers” to help them determine when a client may need additional assistance.

30 clients participated in the Partial Hospitalization Program in 2015. Program staff updated the group curriculum last year using input from clients about topics they found interesting and useful.

71 Senior Companion volunteers provided 35,279 hours of service to local seniors in 2015.

**CENTER FOR RESEARCH AND EDUCATION**

507 professionals participated in education and training programs

200 professionals received the online Ohio Elder Abuse Training

826 clinicians trained in the Texas Elder Abuse Project

26 counselors were trained in the SHARE program, impacting the lives of 84 seniors and caregivers

27 older adults learned valuable information in the pilot of the Heart Health Program

115 professionals delivered the BRI Care Consultation program to 3,803 older adults and caregivers

**MEDICARE AND BENEFITS ENROLLMENT CALL CENTER**

51 Educational programs, reaching more than 2,000 consumers

1,055 consumers served with individual counseling

193 Benefit Check-Ups were completed, helping callers access more than $260,000 in benefit assistance

169 older adults received assistance with Medicare Part D enrollment
Impact

ROSE CENTERS FOR AGING WELL WELCOMES NEW EXECUTIVE DIRECTOR

Dabney K. Conwell, MSSA, LSW, joined the Benjamin Rose Institute on Aging in 2015 as Vice President and Executive Director of the Rose Centers for Aging Well.

The South Euclid resident has committed her career to working with underrepresented populations developing, implementing, managing and evaluating social service programs.

Prior to joining the Benjamin Rose senior management team, Conwell served as Executive Director of the East Cleveland Neighborhood Center. Previously she was Project Coordinator of the Families and Schools Together (FAST) program for the Alcohol, Drug Addiction & Mental Health Services Board of Cuyahoga County, and later became a national trainer and program supervisor for FAST in Madison, Wisconsin. She has also served as a social worker with the East Cleveland City School District and Guidestone.

She currently serves as an Adjunct Professor in the Mandel School of Applied Social Sciences at Case Western Reserve University. Conwell received her Master of Social Service Administration degree at Case Western Reserve University, and a Bachelor of Science degree in social work from Edinboro University.

Conwell will lead the Rose Centers’ efforts to promote successful aging for Northeast Ohio’s adults by offering opportunities, programs and services that foster choice and independence.

At left: Participants at the Ernest J. Bohn Rose Center for Aging Well enjoy an interactive drum performance.

CARF RECERTIFICATION

In 2015, CARF International completed an in-depth review of Benjamin Rose Institute on Aging, resulting in a three-year certification through September 2018. Certified programs include Mental Health Case Management, Outpatient Counseling and the Partial Hospitalization Program.

Benjamin Rose was first certified by CARF in 2006.

CARF accreditation represents the highest level of accreditation that can be awarded to an organization for mental health services. Organizations receiving a Three-Year Accreditation put themselves through a rigorous peer review process. Benjamin Rose demonstrated to a team of surveyors during an on-site visit its commitment to offering programs and services that are measurable, accountable and of the highest quality.

ROSE CENTERS FOR AGING WELL

1,149 seniors visited 7 Rose Centers locations
1,085 seniors received home-delivered meals
178,334 home-delivered meals provided
51,705 hot lunches served in centers
15,827 transportation trips provided
Nearly 250 guests joined us at The Country Club in Pepper Pike on May 3, 2015 for an evening of cocktails, fine dining, silent auction and the 23rd Annual Golden Achievement Awards.

The event celebrated the lifetime achievements of esteemed Clevelanders and helped support the Rose Centers for Aging Well, providing vitally needed home-delivered meals and support to hundreds of low-income, homebound Greater Cleveland seniors every day.

The Golden Achievement Awards are held annually on the first Sunday of May in support of the Rose Centers for Aging Well, a subsidiary of the Benjamin Rose Institute on Aging.

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SAVE THE DATE:
May 7, 2017, for the 25th Annual Golden Achievement Awards.

CONGRATULATIONS TO OUR 2015 GOLDEN ACHIEVEMENT AWARD HONOREES

(front left): Gary Hanson of the Cleveland Orchestra (The Musical Arts honoree)
Norma Lerner (Community Service honoree)
Diane Downing of Huntington Bank (Business honoree)
Nina Gibans (The Arts honoree)
James Campbell, MD of MetroHealth Medical Center (Medicine honoree)
Carol Heiss Jenkins of Winterhurst Skating Club (Sports Legends honoree)
Ted Ginn, Sr. of Glenville High School (Education honoree).

OLDENBURG responded with a $10,000 gift, a level suggested to companies and organizations that would allow them to place their logo on a meal-delivery truck. Rather than a logo, Oldenburg memorialized his wife with “Buster’s Bus, Honoring the Legacy of Buster Oldenburg.” The giraffe featured on the side of the truck was one of Buster’s favorite animals.
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Zero Gravity

We have made every effort to ensure the accuracy of the information presented about donations to Benjamin Rose Institute on Aging or its affiliates in this publication. If you have any corrections, please call the Institutional Advancement Office at 216.373.1611.
Barbara Galvin’s association with Benjamin Rose Institute on Aging began long before her tenure on the Board of Directors. Her grandparents were among the first residents of Margaret Wagner House when it opened for residential care in 1961.

By the mid-1980s, she was caring for her mother. That’s when she was approached by long-time friends Nancy Rome and Ruth Fiordalis about joining the Board. She said yes, and was a member of the Board from 1984 to 2005, including serving as chairperson from 1997-1998.

The decision to volunteer was easy. “To me, that’s what you do.”

In addition to her gift of time as a Board member, Galvin and her husband, Peter, have been generous supporters of Benjamin Rose in a variety of other ways: through consistent leadership support of annual funds and capital campaigns, in-kind donations of artwork, and support of events and programs.

In 2001, the couple joined the 1908 Legacy Society, Benjamin Rose’s planned giving recognition society. The Galvins named Benjamin Rose among the beneficiaries of a charitable remainder trust. A little over a decade later, they decided to dissolve the trust and disburse the benefits. “We thought ‘why wait until we pass away when organizations can use the funds now?’” Galvin said.

“Benjamin Rose is a wonderful organization,” she said. “It does a lot of good for older people, especially in research and advocacy.”

The Galvin’s thoughtful gift directly impacted Benjamin Rose by providing crucial operating funds for the organization.
IN MEMORY OF

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Ms. Susan Andrews

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Marcia J. Wexberg
Dorothy M. Young*

* deceased

1908 LEGACY SOCIETY

Members of the 1908 Legacy Society have included the Benjamin Rose Institute on Aging in their estate plans or established endowment funds. These donors share a belief in our mission, services and purpose. Their commitment to Benjamin Rose will enable us to continue to thrive for future generations.

If you have questions about becoming a Legacy Society member, or if you have made provisions for the Benjamin Rose Institute on Aging in your estate plans but do not see your name listed, please contact Anne-Marie E. Connors at 216.373.1608 or aconnors@benrose.org. We would like to honor your commitment and dedication to Benjamin Rose.
Support

FUNDING SOURCES

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AARP
Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County
Alzheimer’s Association
  • Northwest Ohio Chapter
Bruening Foundation
Business Volunteers Unlimited
Case Western Reserve University
The Cleveland Foundation
Corporation for National and Community Service
Cuyahoga Arts & Culture
Cuyahoga County Division of Senior and Adult Services
  • Family Caregiver Alliance
The Edwin T. and Mary E. Hamilton Fund
Gerontological Society of America
McGregor Foundation
National Institute on Aging
The Norma Witt Jackson Fund
Ohio Arts Council
Ohio Department of Aging
University Hospitals
U.S. Department of Health and Human Services:
  • Administration on Aging
  • Centers for Medicare & Medicaid Services
WellMed Charitable Foundation
Western Reserve Area Agency on Aging

OTHER SOURCES

Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County
Apartment Tenant Fees
Benjamin Rose Trust Funds
Buckeye Health
CareSource
Child and Adult Care Food Programs, State of Ohio
City of Cleveland
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Cuyahoga County Division of Senior and Adult Services
  • Options for Elders
Evidence-Based Programs Contracts
FIT Interactive
Gifts and Donations
Medicaid
Medicare
MyCare Ohio
  • Centene
  • CareSource
  • United Healthcare
New Market Tax Credits
Ohio Department of Aging
Older Americans Act
Research Evaluation Contracts
United Way
U.S. Department of Housing and Urban Development
U.S. Department of Veteran’s Affairs
Village of Oakwood
Western Reserve Area Agency on Aging (PASSPORT)

Thanks to our funders who enable programming like the Senior Companion Program (photo, above right) funded in part by the Corporation for National and Community Service, and the expressive arts programs supported by Cuyahoga Arts & Culture.
2015 FINANCIALS

**SOURCES OF PROGRAM SUPPORT***
$13,078,000

- **Income from Trusts** $4,598,000
- **Eldercare Services Institute, LLC Income** $2,603,000
- **Contributions ** $1,978,000
- **Rose Centers for Aging Well** $1,304,000
- **Grants** $1,099,000
- **Margaret Wagner Apartments** $591,000
- **Interest and Dividends** $266,000
- **Other Income** $242,000
- **Research** $229,000
- **Benjamin Rose Property, LLC Income** $168,000

**COSTS OF PROGRAM SERVICES**
$14,661,000

- **Eldercare Services Institute, LLC** $3,826,000
- **Rose Centers for Aging Well** $2,990,000
- **Administration and Support** $2,487,000
- **Benjamin Rose Property, LLC** $1,626,000
- **Research** $1,440,000
- **Advocacy** $1,042,000
- **Margaret Wagner Apartments** $667,000
- **Marketing** $340,000
- **Fund Raising** $243,000

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

**Includes in-kind gifts**

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*35.1%* 1.9% 1.8% 4.5% 2.0% 1.3% 10.0% 8.4% 15.1% 19.9% 26.1% 20.4% 17.0% 11.1% 7.1% 4.5% 2.3% 1.7%
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WELCOME NEW BOARD MEMBERS
The Benjamin Rose Institute on Aging Board of Directors welcomed five new members in 2015:

Kathryn Bryan, PhD
Financial Planner
Skylight Financial Group

Maggie Jackson, PhD
Chair and Director of Social Work
Cleveland State University

Cynthia H. Dunn
President & CEO
Judson Services, Inc.

Sue Omori
Executive Director, Marketing Account Services
The Cleveland Clinic

Constance Hill-Johnson, MPA
Owner and Managing Director
Visiting Angels Living Assistance Services
Adopted by the Board of Directors in April 2016, the 2016-2020 Strategic Plan of the Benjamin Rose Institute on Aging will guide the organization’s work over the next five years. The Strategic Plan was developed through a series of interviews with national experts in the field of aging, community leaders, Board members, administrators and staff. It is intended to be a living document that will enable the organization to address the needs of an ever-changing environment while remaining true to its mission of advancing support for older adults and caregivers.

Our MISSION

Advance support for older adults and caregivers

~ Deepen the understanding of their evolving needs in a changing society.
~ Develop and deliver innovative, high-quality solutions.
~ Promote effective public policies.

Our VISION

Benjamin Rose will be at the forefront of developing and delivering strategies that promote health and wellness for older adults and caregivers. This will be accomplished through strong national and local partnerships with healthcare institutions, community-based organizations, government agencies, universities and research institutes.

Our CORE VALUES

We believe in and practice:

• Advocacy on behalf of older adults and respect for their intrinsic value and rights.
• Recognition of all aspects of diversity and the importance of inclusiveness.
• Engaging the talents of each employee to advance our mission.
• Fiscal responsibility, resourcefulness and accountability.
• Adhering to the highest standards of professionalism and ethical behavior.

GOALS

GOAL 1
Increase the dissemination of knowledge and information to older adults, caregivers, professionals and policymakers that is relevant to improving services and supports.

GOAL 2
Expand current research on caregiving, service access and impact, and wellness; pursue new research topics and product development; and market research-based products to organizations and consumers.

GOAL 3
Align services in response to evolving consumer preferences, sustainable partnership opportunities, and evidence on effective practices.

GOAL 4
Promote an organizational culture that encourages the development of new ideas, methods and products.

GOAL 5
Create a new business model and funding strategies to support organizational growth.