older adults and caregivers
2016 Annual Report
ABOUT THIS BOOK

This is the 2016 Annual Report of the Benjamin Rose Institute on Aging and its subsidiary organizations: Eldercare Services Institute, LLC, Rose Centers for Aging Well, LLC, and Benjamin Rose Property, LLC. At time of publication, ESOP (Empowering and Strengthening Ohio’s People) also joined Benjamin Rose as a subsidiary organization.

The Annual Report is produced by the Institutional Advancement team: Anne-Marie E. Connors, Vice President of Institutional Advancement, Jeanne Hoban, Director of Marketing Communications, Jennifer Salkin, Marketing Communications Coordinator, and Anthony Zacchino, Institutional Advancement Coordinator. Design: Studiothink.
Dear Friends,

This is a critical time in the delivery of aging services and supports. Ongoing debates on health care, policy, funding of entitlement programs, regulatory constraints and reductions of other federal and state funding sources to support aging in the community, and the ever-growing population of older people, mean that we are operating in a fluid environment. The need for innovation continues to grow. Benjamin Rose will continue to be a leader in innovation in service delivery and a knowledgeable resource for older adults, caregivers, professionals and policy makers.

Throughout 2016, the Board of Directors and staff worked diligently toward debating and shaping a set of ambitious goals to expand our impact and advance our sustainability over the next five years. At the end of the year, we unveiled our Strategic Plan to guide the work of Benjamin Rose Institute on Aging and our subsidiary organizations. You can read a summary of the plan on the inside back cover of this report.

Throughout this annual report, you will read about the innovative programs, services and resources being developed and grown to increase support for older adults and caregivers. It describes the foundation for continuing our mission and helping to create a better future for older adults. We are making substantial progress toward realizing our vision of being at the forefront of developing service-delivery models that promote health and wellness for older adults, offset negative consequences of chronic health conditions, and reduce caregiver stress.

We don’t do those things alone. Over the past few years, we have worked more broadly in the community, developing partnerships that continue to grow. Throughout 2016 we partnered with a diverse group of organizations,
including AARP, Empowering and Strengthening Ohio’s People (ESOP), Recovery Resources, Fairhill Partners, Visiting Angels, the Ohio Attorney General’s Office, the Legal Aid Society of Cleveland, the Alzheimer’s Association, City of Cleveland Department of Aging, Art Therapy Studio, LGBT Community Center of Greater Cleveland, and the U.S. Department of Veterans Affairs. Each of the relationships helps to strengthen our educational programs for older adults, caregivers and professionals, as well as to assist our partners and forge stronger collaborations. In fact, at the time of publication of this report, one of our partnerships, with ESOP, matured into a merger with Benjamin Rose, enabling both of us to expand our reach and menu of services – after all, aging well is not just about health. Financial security and stable housing are also vitally important to remaining independent in the community. ESOP brings that expertise to the Benjamin Rose family.

We will continue to explore new approaches to our work. Our strategic plan is a ‘living document’ that will continue to guide our efforts even as it evolves, as we strive to help people understand more about aging and the process of navigating resources and services. We are grateful for the continued support of our partners, funders, donors, volunteers and friends who will help make our vision a reality.

Thank you,

Richard Browdie  
President & CEO

Elizabeth F. Stueber  
Chairperson, Board of Directors
In clinical settings, self-neglect may be mistaken for ‘noncompliance.’

In 2016 Benjamin Rose Institute on Aging, Texas Adult Protective Services (APS), WellMed Charitable Foundation, and the Elder Justice Coalition received a grant from the Administration for Community Living (ACL) to address the issue. First-year funding ($488,550) supported a project to identify and prevent self-neglect among older and disabled adults in Texas.

Under the direction of Principal Investigator, Farida K. Ejaz, PhD, the project examines risk factors for self-neglect in patients in WellMed primary care clinics. Patients whose medical records indicate risk factors are visited by a WellMed social worker, who screens for self-neglect and assesses the living environment. Self-neglecting patients are referred to APS; others at-risk receive targeted interventions and supportive services to prevent self-neglect.

Identification tools were developed in an earlier project funded by ACL and have become routine practice in WellMed clinics across Texas. Through that project, 7,163 patients were screened across 63 clinics and more than 500 cases were reported to APS.

The new project builds on the lessons learned from the earlier project. In one case, clinicians complained of a ‘noncompliant’ patient who was missing appointments. “The APS worker offered to go out to the home, said Deborah Billa, Grants Manager at WellMed. “It turns out, the man was in a wheelchair and someone had stolen his metal ramp so he couldn’t get out of the house.”

WellMed staff rallied together and installed a concrete ramp that could not be removed.

According to Carol Zerniel, Executive Director Charitable Foundation at WellMed, “When we first started, one doctor was telling staff not to report to APS, because ‘they don’t do anything’. Now some of the most resistant are the biggest champions of the program.”
Depression is a common issue among older adults and their caregivers, but it is not a normal part of aging or caregiving. It can have alarming physical and mental effects on individuals and impact their overall health and ability to perform daily living tasks.

On November 10, 2016, Benjamin Rose Institute on Aging presented a day-long conference titled “Depression Among Older Adults and Their Caregivers: Treatments and Supports” in collaboration with the U.S. Department of Veterans Affairs.

The conference provided information to clinicians from organizations throughout northeast Ohio to help them recognize and address depression and improve care for their clients.

A national perspective on best practices and treatments for depression was presented by keynote speaker Nancy Wilson, MA, LCSW, Baylor College of Medicine. Local speakers included Peijun Chen, MD, PhD, Louis Stokes Cleveland VA Medical Center (Stokes VAMC) and Case Western Reserve University; Clare Gideon, PhD, Stokes VAMC; Erin Rader, APN, CNS, MetroHealth Medical Center and Cleveland Clinic Lorain Institute; Karen White, PsyD, Stokes VAMC; and Kerstin Yoder, MSSA, LISW-S, Benjamin Rose Institute on Aging.
In 2016, Benjamin Rose educational programming expanded to include sessions designed specifically for older adults and caregivers.

In February, Benjamin Rose, in collaboration with Fairhill Partners, hosted a free day-long event providing health information and hands-on experiences to help older adults prevent or manage chronic illnesses. The program, sponsored by AARP, covered skills and resources to reduce stress, engage in healthy eating and help them to enjoy an active and high quality life.

In June, Benjamin Rose, in collaboration with Empowering and Strengthening Ohio’s People (ESOP), Fairhill Partners, The Legal Aid Society of Cleveland and the Office of Ohio Attorney General Mike DeWine, hosted a free day-long event about financial wellness. Participants learned about the interplay of financial wellness, health and family relationships; preventing financial exploitation; services, government, legal and law enforcement resources; and planning for retirement.
The East Cleveland Rose Center expanded its community footprint in 2016. Through our first-of-its-kind partnership with the Salvation Army, East Cleveland older adults can now enjoy a 30,000 square feet multipurpose space and expanded opportunities to age well in their home community. The East Cleveland Rose Center moved into the newly built East Cleveland Salvation Army location in February 2016.

The East Cleveland Rose Center continues to offer programming such as tai chi, dominoes and card games that participants enjoyed at the previous location at New Life Cathedral, where the Center was housed following the closing of the Helen S. Brown Center in December 2014. The move also allowed the center to expand programming to include billiards, walking club, dedicated knitting, sewing and jewelry making spaces, and martial arts classes. Additionally, the older adults have independent access to the amenities of The Salvation Army such as the exercise room and instructor-led computer classes.
AGING MASTERY PROGRAM®

Benjamin Rose Institute on Aging and the Cleveland Department of Aging teamed up to offer a 10-week health and wellness program to residents 55 and older in 2016. The Aging Mastery Program® (AMP), a nationally recognized program developed by the National Council on Aging (NCOA), was presented for the first time in Northeast Ohio with support from The Cleveland Foundation.

Programs were held in locations throughout the City of Cleveland to empower older adults to make and maintain small but impactful changes. The classes explored navigating longer lives, physical activity, sleep, healthy eating and hydration, financial fitness, medication management, advanced planning, healthy relationships, falls prevention, and community engagement.

ONE CALL for wellness
A COORDINATED PROGRAMMING INITIATIVE

In 2016, Benjamin Rose Institute on Aging, Rose Centers for Aging Well, the City of Cleveland Department of Aging, Empowering and Strengthening Ohio’s People (ESOP), Fairhill Partners and Greater Cleveland Food Bank partnered to develop a one-stop shop for evidence-based, evidence-informed and other health and wellness programs for older adults.

The initiative that was developed – One Call for Wellness – was funded in December through a Senior Center Innovation Grant awarded by the Cuyahoga County Division of Senior and Adult Services (DSAS) through the Health & Human Services Levy.

One Call for Wellness is a unique program developed to provide a cost-effective process for senior center directors to reach older adults in Cuyahoga County with evidence-based and evidence-informed programs that promote health and wellness.
BRI CARE CONSULTATION RECOGNIZED

BRI Care Consultation, an evidence-based care coaching program for people with chronic conditions and their family caregivers, was one of five programs across the country selected by the U.S. Administration for Community Living in 2016 to be featured on its website spotlighting Aging and Disability Evidence-Based Programs and Practices (ADEPP). The purpose of ADEPP is to help the public learn more about available evidence-based programs and practices in the areas of aging and disability and determine which of these may best meet their needs.

Additionally, BRI Care Consultation was prominently featured in the National Academy of Sciences report, “Families Caring for an Aging America,” which was published in September 2016.

BRI Care Consultation, which was developed through more than 15 years of research, uses technology to provide one-on-one coaching that empowers people with chronic conditions to effectively manage their care and decision making. It is currently delivered to families through 34 licensed organizations across the United States. For more information, visit benrose.org/bricareconsultation.

EXPANDING THE REACH OF SHARE

Benjamin Rose Institute on Aging received a two-year $264,803 grant award from the Retirement Research Foundation (RRF) to adapt the evidence-based early-stage dementia intervention SHARE (Support, Health, Activities, Resources, Education) for families facing the challenges of chronic conditions.

The six-session SHARE program uses technology to engage individuals with early-stage dementia and their care partners in discussions about symptoms, communication, care values and preferences, healthy activities and planning for the future. SHARE makes it easier for families to have conversations about often difficult care topics and helps ease caregiver burden.

The RRF grant will enable researchers to test whether SHARE is similarly effective for individuals with chronic conditions other than dementia.

Benjamin Rose Institute on Aging currently licenses organizations to provide SHARE for Dementia. For more information, visit benrose.org/SHARE.
Each year Benjamin Rose Institute on Aging’s Eldercare Services Institute (ESI) and the Rose Centers for Aging Well conduct client satisfaction surveys and focus groups to ensure the quality of programs and services. Information gathered through the annual research is used to continually improve the quality of services provided to Benjamin Rose clients.

**ROSE CENTERS FOR AGING WELL**

For the Rose Centers, the top three areas in which client needs were met included:

1. The Centers being clean,
2. Feeling safe at the Center, and
3. The Center social worker being helpful

For all Home-Delivered Meal Programs, the top three meal-related areas in which client needs were met included:

1. The monthly menu being received in a timely manner,
2. The food being hot when it should be hot, and
3. The food being cold when it should be cold

In addition, clients provided high marks in staff-related areas:

1. The person delivering the meal being pleasant and courteous, and
2. The social worker being helpful

**ELDERCARE SERVICES INSTITUTE**

Across Eldercare Services programs, three areas received especially high rating from clients:

1. Providing care in a timely manner,
2. Being talked to in a courteous and respectful manner, and
3. Arriving to provide care and services on time

The majority of clients reported that care and services meet their needs.

**BENJAMIN ROSE IMPACT**

**840** clients assisted through one or more services from the Eldercare Services Institute such as home care, mental health case management, social work, adult day services, and day treatment/partial hospitalization

**95%** of Eldercare Services Institute stakeholders are very likely to refer clients to ESI programs

**88.2%** of Eldercare Services Institute clients reported satisfaction with services

**over 95%** of clients of Eldercare Services and Rose Centers would recommend programs to family and friends

**82.5%** of Rose Centers participants reported satisfaction with programs and services.
Currently, many lesbian, gay, bisexual, and transgender (LGBT) adults are experiencing the most social acceptance in U.S. history. At the same time, however, many LGBT elders are facing the challenges of aging and alienation from family and friends.

These issues were at the center of Benjamin Rose Institute on Aging’s annual Katz Policy Lecture on October 20, 2016 presented with support from AARP.

The lecture capped a day-long conference addressing the health and wellness needs of LGBT older adults. The conference, presented in collaboration with the LGBT Community Center of Greater Cleveland, offered health professionals helpful information about working effectively with this at-risk group. Attendees were introduced to SAGE Cleveland (Services & Advocacy for GLBT Elders) and had the opportunity to learn from the wisdom of a panel of LGBT elders.

The Katz Policy Lecture was delivered by Michael Adams, JD, MA, Chief Executive Officer of SAGE USA.

Local speakers included Swagata Banik, PhD, Chair, Public Health and Prevention Services Department, Baldwin Wallace University; Mary Beth Bartholomew, BA, Program Activities Director, SAGE Cleveland; Henry Ng, MD, MPH, FAAP, FACP, Assistant Dean of Admissions, Case Western Reserve University School of Medicine; Douglas Braun, MSSA, LISW, Administrator of Counseling Services, Benjamin Rose Institute on Aging; and Kelley L. Neal, Volunteer Engagement Specialist, AARP Ohio.
Throughout 2016, Benjamin Rose Institute on Aging staff continued to demonstrate leadership in aging by serving on state and local committees and boards impacting older adults and caregivers. The participation of Benjamin Rose staff ensures that the needs of our constituents are represented in discussions with decision makers and policy makers. Among the committees and boards on which Benjamin Rose staff serve are:

- American Bar Association Commission on Law and Aging
- Council on Older Persons (COOP)
- Advisory Board of the Cuyahoga County Division of Senior and Adult Services
- Hoarding Connection of Cuyahoga County
- Mental Health and Addiction Advocacy Committee
- Suicide Prevention Task Force
- Scam Squad of the Cuyahoga County Department of Consumer Affairs

Benjamin Rose hosted a retirement celebration for local leaders in aging in December. From left: Terry Hokenstad, Case Western Reserve University; Harvey Shankman, Eliza Bryant Village; Jane Fumich, City of Cleveland Department on Aging; Semanthie Brooks, Benjamin Rose Institute on Aging; and Robert Eckardt, The Cleveland Foundation.
FUNDING SOURCES

GRANTS
Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County
CareSource Foundation
Case Western Reserve University
The Cleveland Foundation
Corporation for National and Community Service
Cuyahoga Arts & Culture
Cuyahoga County Division of Senior and Adult Services
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U.S. Department of Health and Human Services:
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Western Reserve Area Agency on Aging

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Client Fees
Cuyahoga County Board of Developmental Disabilities
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Community Social Services Program
Options for Elders
Evidence-Based Programs Contracts
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Older Americans Act
Research Evaluation Contracts
United Way
U.S. Department of Housing and Urban Development
U.S. Department of Veteran Affairs
Village of Oakwood
Western Reserve Area Agency on Aging

PASSPORT

OTHER SOURCES
Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County
Apartment Tenant Fees
Benjamin Rose Trust Funds
CAHPS Survey Contracts
CareSource
Child and Adult Care Food Programs, State of Ohio

United Way
Ohio Department of Developmental Disabilities
Ohio Department of Education
WRAAA (West Shore Regional Agency on Aging)
SOURCES & COSTS

SOURCES OF PROGRAM SUPPORT*
$13,050,000

- Eldercare Services Institute, LLC Income
  $2,604,000 | 20.0%
- Contributions**
  $2,147,000 | 16.5%
- Rose Centers for Aging Well
  $1,260,000 | 9.7%
- Grants
  $814,000 | 6.2%
- Interest and Dividends
  $690,000 | 5.3%
- Margaret Wagner Apartments
  $576,000 | 4.4%
- Research
  $226,000 | 1.7%
- Eldercare Services Institute, LLC
  $3,790,000 | 26.0%
- Benjamin Rose Property, LLC Income
  $1,727,000 | 12.0%
- Other Income
  $104,000 | 0.8%

- Income from Trusts
  $4,508,000 | 34.5%
- Contributions**
  $2,147,000 | 16.5%
- Rose Centers for Aging Well
  $1,260,000 | 9.7%
- Grants
  $814,000 | 6.2%
- Interest and Dividends
  $690,000 | 5.3%
- Margaret Wagner Apartments
  $576,000 | 4.4%
- Research
  $226,000 | 1.7%
- Eldercare Services Institute, LLC
  $3,790,000 | 26.0%
- Benjamin Rose Property, LLC Income
  $1,727,000 | 11.8%
- Other Income
  $104,000 | 0.8%

*COSTS OF PROGRAM SERVICES
$14,575,000

- Eldercare Services Institute, LLC
  $2,604,000 | 20.0%
- Contributions**
  $2,147,000 | 16.5%
- Rose Centers for Aging Well
  $1,260,000 | 9.7%
- Grants
  $814,000 | 6.2%
- Interest and Dividends
  $690,000 | 5.3%
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  $226,000 | 1.7%
- Eldercare Services Institute, LLC
  $3,790,000 | 26.0%
- Benjamin Rose Property, LLC Income
  $1,727,000 | 11.8%
- Other Income
  $104,000 | 0.8%

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

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Marcia J. Wexberg  
Dorothy M. Young*  

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Academy Graphic Communication  
Accents Salon & Spa  
Alson Jewlers  
Antrobus Designs  
Apollo’s Fire  
Aspire Fitness  
Beau Coiffure Salon & Spa Boutique  
Beck Center  
Bernie Moreno Companies  
Mr. & Mrs. Michael Biedenbach  
Mr. & Mrs. Gary Brahler  
Dr. Kathryn J. Bryan  
Cabi by Design Clothier  
Capital Genealogy  
Mr. & Mrs. Mark & Suzanne Carle  
The City Club of Cleveland  
Classic Lexus  
Cleveland Clinic Wellness Institute  
The Cleveland Institute of Art  
The Cleveland Leadership Center  
The Cleveland Skating Club  
Mr. & Mrs. Andrew & Anne-Marie E. Connors  
Ms. Sarah M. Dimling  
District  
Dollar Bank  
Fiddlehead Gallery  
Food for Thought  
Mrs. Nina Gibans  
Girlntrunks Swimwear  
Great Lakes Publishing  
Great Lakes Theater  
GV Artwork  
Hyde Park Restaurant - Beachwood  
The Hygenic Corporation  
InterContinental Hotel  
Mrs. Yvette M. Ittu  
Mr. Kevin Johnson & Mrs. Constance Hill-Johnson  
Judson Retirement Community  
Knitting Group at Judson Park  
Ms. Laurice Koury  
Mrs. Terry Kovel  
Ladies & Gentlemen Salon and Spa  
L’Albatros  
Ms. Christine Lobas  
Lotus Layer Medica Spa  
Lovejoy Photography  
The Loving Hands Group  
Mr. Michael Lyons  
Maltz Museum of Jewish Heritage  
Ms. Rochelle Marx  
Mulholland & Sachs  
Northeast Ohio Boomer & Beyond  
Organizing 4 U  
Phuel Cafe  
Pickles & Pints  
Mr. John W. Power  
Pre-ferd Maid Service  
Mr. Daniel Pruitt  
Quintana’s Barber & Dream Spa  
Ms. Gloria Ritter  
Serenity Helicopter StudioThink  
Mr. & Mrs. Frederick Stueber  
Ms. Martha Towns  
Verify Food for Thought  
Zero Gravity
The Benjamin Rose Institute on Aging and Rose Centers for Aging Well welcomed more than 200 guests for the 2016 Golden Achievement Awards. The annual gala was held May 1 at The Country Club in Pepper Pike. Funds raised at the gala benefit the home-delivered meal operations and programs and services of the Rose Centers.

Each year the Golden Achievement Awards recognize outstanding individuals who are honored for their contributions to the community in selected categories. In 2016 year, honorees were chosen in six specific categories.

**LIFETIME ACCOMPLISHMENTS:** Richard J. Bogomolny

**BUSINESS:** Michael A. Clegg

**MEDICINE:** Pamela B. Davis, MD, PhD

**THE ARTS:** Joseph J. Garry & David O. Frazier

**COMMUNITY SERVICE:** Dennis M. Lafferty

**EDUCATION:** Grafton J. Nunes

Pictured (L-R): Grafton J. Nunes, Dennis M. Lafferty, Richard J. Bogomolny, Joseph J. Garry, Pamela B. Davis, MD, PhD, and Michael A. Clegg. David O. Frazier, who passed away in March, was recognized posthumously.
2016 BOARD OF DIRECTORS

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Catherine D. LoPresti
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JoAnn H. Morano
Sue Omori

WELCOME NEW BOARD MEMBER

Deborah Enty
Chief Operating Officer/Administrator
Eliza Bryant Village

IN MEMORIAM:
Mary Ann Gehringer
Board of Directors
Oct 1996 to Oct 1999

2016-2020 Strategic Plan

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.

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.

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.

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 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.

2016-2020
Strategic Plan

Our MISSION

Our CORE VALUES

Our VISION

216.791.8000
www.benrose.org
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