A VISION FOR aging well
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UPCOMING 2018 EVENTS—SAVE THE DATE!

Oct. 3 Katz Policy Lecture
Oct. 16 ESOP Luncheon & Awards

Nov. 8 110th Anniversary Event
Dec. 6 Caregiving Conference

For more information visit benrose.org.

Front cover photo: The Musical Theater Project visits the Paul Alandt Lakeshore Rose Center for Aging Well, engaging young students and older adults in an intergenerational experience based on American musical theater.
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ABOUT THIS BOOK

This is the 2017 Annual Report of the Benjamin Rose Institute on Aging and its subsidiaries: Eldercare Services Institute, LLC, Rose Centers for Aging Well, LLC, Benjamin Rose Property, LLC, and ESOP (Empowering and Strengthening Ohio’s People).

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.
With our partners in the advocacy arena, we were able to educate legislators and the public about important issues affecting their families. We helped prevent federal reductions in important safety net programs, such as home-delivered meals, senior centers, and the near-elimination of the Senior Corps program. We provided education about elder abuse prevention and advocated for passage of the Grassley-Blumenthal Elder Abuse Prevention and Prosecution Act of 2017, which was signed into law by President Trump on October 18.

Partnerships are also important to the work we do providing direct services to older adults and conducting research to improve care and quality of life for older adults and caregivers. Our East Cleveland Rose Center for Aging Well moved into a brand new facility in 2017, thanks to our partnership with The Salvation Army. Through our partnership with the National Council on Aging, Anthem and the City of Cleveland Department of Aging, we reached hundreds of older adults with the Aging Mastery Program, providing them with practical tools and information for aging well.

We continue to expand partnerships with health systems and other health and social service providers to ensure older adults and caregivers have access to the resources and supports they need.

Long-time partner Empowering and Strengthening Ohio’s People (ESOP) joined us as a subsidiary in 2017. The merger has been mutually beneficial. It has expanded ESOP’s ability to help people of all ages improve their financial wellness and housing stability. For people currently receiving services from Benjamin Rose, the merger has also increased access to the education and resources they need to age in place with financial and housing security.

In the back of this annual report, you will find our 2016-2020 Strategic Plan, which continues to guide our work in developing strategic partnerships as well as the other activities you will read about in this Annual Report.

In November 2018, Benjamin Rose Institute on Aging will celebrate its 110th anniversary. We are confident that we are positioned to remain a thought leader, to lead innovation in service delivery for older adults and families, and to expand our positive impact on the lives of older people in Northeast Ohio and around the country.

Sincerely,

Richard Browdie
President & CEO

Emily Drake
Chairperson, Board of Directors
Dabney K. Conwell, MSSA, MSW, Vice President of Benjamin Rose Institute on Aging and Executive Director of Rose Centers for Aging Well, was selected as an *inaugural fellow of The Innovation Mission* in 2017 by The Sisters of Charity Foundation of Cleveland, in partnership with Cleveland Leadership Center. Conwell is among five Cleveland-area professionals who began in fall of 2017 to research their ideas to disrupt the cycle of poverty. The fellowship has enabled Conwell to investigate whether the number of hospital readmissions of low-income older adults can be reduced by providing a daily delivered hot meal upon hospital discharge. The project has the potential to have a direct, positive impact on the more than 22% of older Clevelanders who live in poverty.

In addition to taking creative approaches to nutrition services, the Rose Centers for Aging Well *expanded the use of evidence-based and evidence-informed programs for older adults* throughout the year. Center participants enjoyed interactive, intergenerational programs from The Musical Theater Project. They also brushed up on the basics of aging well with the Aging Mastery Program (AMP) developed by the National Council on Aging. The AMP program helps people develop sustainable behaviors to improve their health, economic security, well-being and social participation.

As a licensed provider, the Rose Centers offered additional AMP programs with the City of Cleveland Department of Aging and Anthem. *Delivery of innovative programs expanded beyond the Rose Centers’ walls.* The Rose Centers provided leadership for One Call for Wellness, a coordinated programming initiative that offers a one-stop-shop for evidence-based, evidence-informed and other health and wellness programs for older adults. By offering a menu of programs from multiple organizations, One Call for Wellness makes it easier for senior center directors and others in Cuyahoga County to access and schedule high-quality programs that promote health and wellness. The initiative launched in March 2017 as a partnership among: Benjamin Rose Institute on Aging, City of Cleveland Department of Aging, Empowering and Strengthening Ohio’s People (ESOP), Fairhill Partners, Greater Cleveland Food Bank and the Rose Centers for Aging Well. The initiative is funded in part through a Senior Center Innovation Grant awarded by the Cuyahoga County Division of Senior and Adult Services through the Health and Human Services Levy.
ESOP JOINS BENJAMIN ROSE

Long-time partner Empowering and Strengthening Ohio’s People (ESOP) joined Benjamin Rose as a subsidiary, effective July 16, 2017. ESOP continues to operate as a distinct 501(c)(3) nonprofit organization with its own Board of Managers.

Benjamin Rose and ESOP, a housing and financial counseling agency, have a successful history of collaboration. Leadership of both organizations determined that a formal relationship would position both nonprofits to grow in the future. The merger also acknowledges the strong link that financial wellness and housing stability have to physical health and well-being. Together, the organizations are broadening their impact on the lives of primarily low- and moderate-income older adults by expanding services and supports to include home- and community-based services as well as tools, resources and expertise to help families manage their resources.

The integration of both organizations’ operations has provided significant administrative efficiencies. The resulting cost efficiencies allow Benjamin Rose and ESOP to direct additional dollars to vital services and programs.

More information at esop-cleveland.org.

BEHAVIORAL HEALTH REDESIGN

In late 2016, the state of Ohio through the Ohio Department of Medicaid and the Ohio Department of Mental Health and Addiction Services, began restructuring the way mental health care is funded and delivered. As a service provider, Benjamin Rose Institute on Aging made several structural changes to its services division, Eldercare Services Institute (ESI), in response to this statewide behavioral health redesign. While the impetus for change was external, the reorganization of mental health programs into Behavioral Health Services was also designed to improve the efficiency and effectiveness of the services provided by the department.

Behavioral Health Services now include:

Mental Health Case Management delivered as Therapeutic Behavioral Services (TBS) and Community Psychiatric Supportive Treatment (CPST) to enable older adults with mental illness to live in their homes or in the least restrictive environment.

Mental Health Day Treatment, an intensive, daily, three-hour group therapy service designed to help older adults with mental illness continue to live as independently as possible. Sessions explore a variety of topics that assist older people with issues of daily life.

Social Work Counseling/Psychotherapy Services to assist older adults as they navigate changes in their lives and help them cope with the emotions that come with transition.

The Eldercare Services Institute continues to provide other home and community-based services, including service coordination, fee-for-service social work case management and consultation, Senior Companion services, Adult Day services and Home Care through our other home- and community-based services and programs.

More information at benrose.org/services.
expanding research

BRI CARE CONSULTATION™ EXPANDS COAST-TO-COAST

BRI Care Consultation™ is an evidence-based care-coaching program, developed through nearly 20 years of studies. The program empowers older adults with chronic conditions and their caregivers to manage the chronic conditions with actionable care plans, which helps improve care and quality of life. BRI Care Consultation™ has been proven to reduce emergency department and other hospitalizations among users. It also has been shown to reduce unmet needs among older adults and caregivers.

By the end of 2017, 29 organizations in 10 states across the country had been licensed by Benjamin Rose to offer BRI Care Consultation™. As a result of this expansion of BRI Care Consultation™, thousands of families around the United States have been touched by the program.

Over the past five years, Benjamin Rose has trained more than 150 Care Consultants and Supervisors across the country to deliver the program within their organizations. The program recently was added to the Administration for Community Living’s pre-approved list of programs eligible for Title III-D funding through the Older Americans Act.

BRI Care Consultation™ also is being integrated into the menu of home- and community-based services offered by Benjamin Rose. This will give even more families access to the practical solutions and ongoing support offered through BRI Care Consultation™.

More information at benrose.org/bricareconsultation.

SHARE FOR DEMENTIA LAUNCHES AS LICENSED PRODUCT

The evidence-based program SHARE for Dementia has helped many families cope with a diagnosis of early-stage dementia by providing counseling and information and helping them develop care plans that include the preferences and values of the person with dementia. In 2017, Benjamin Rose began licensing organizations to deliver SHARE and publicly launched an iPad app to assist SHARE counselors in delivering the program to families. The new technology enables SHARE counselors to keep track of sessions more easily, aids in reporting and provides an engaging tool to make sessions more interactive.

More information at benrose.org/share.
IDENTIFYING AND PREVENTING SELF-NEGLECT

Benjamin Rose Institute on Aging and its partners at Texas Adult Protective Services (APS), WellMed Charitable Foundation, WellMed Medical Management and the Elder Justice Coalition began collaborating on a project on self-neglect in late 2016. The project is funded by an Elder Justice Innovation Grant from the U.S. Administration for Community Living. It builds on an earlier ACL-funded project to train clinicians in health care settings in Texas to identify, screen for and report elder abuse. In that study, self-neglect was by far the most commonly reported type of abuse (68% of allegations). Self-neglect has been linked to myriad physical and psychological health issues, higher mortality rates, and increased health care service use.

The focus of the current project is to screen for risk factors for self-neglect among older adults and people with disabilities in WellMed clinics in Texas. If evidence of self-neglect is found, individuals are referred to Texas APS for follow-up. Anyone identified as being at risk of self-neglect receives targeted long-term services and supports in order to prevent them from becoming self-neglecting in the future.

Some risk factors for self-neglect include living alone, having cognitive deficits, and having limited resources. The project evaluation will assess whether the intervention group (those who received the services mentioned above) had better outcomes than a control group in terms of their physical and emotional well-being, whether they were more likely to remain at home, and overall, if they had lower health care costs.

The earlier study led to increased collaboration among clinicians and APS workers and helped identify more than 500 cases of abuse, neglect and exploitation. If the current intervention proves successful, it could help hundreds more avoid self-neglect by providing access to much-needed supports and services.

More information on the ACL Elder Justice Innovation Grants at acl.gov/programs.

The self-neglect project team presented findings at the 2018 American Society on Aging meeting.
Staff from Benjamin Rose Institute on Aging have long been a fixture at national conferences, presenting findings on research projects and information about the implementation of innovative programs. Those efforts were increased in 2017 as part of the strategic goal of increasing the dissemination of knowledge and information on aging. Staff throughout the organization were encouraged and received organizational support to present nationally on their areas of expertise. At the 2017 Aging in America conference of the American Society on Aging, for instance, 11 staff members attended. For 2018, 45% more staff attended and 14 presentations were accepted at the national conference, including presentations on self-neglect, hoarding, financial exploitation, evidence-based programs for older adults and caregivers, service delivery models and other topics.

For a list of major presentations, visit benrose.org/news.

The expertise of Benjamin Rose was recognized through invitations to present nationally. Staff presented in two invited webinars for Grantmakers in Aging, an association of philanthropic funders in the aging field, and two invited presentations at the National Adult Protective Services Association (NAPSA) conference to share information about elder abuse and self-neglect.

Benjamin Rose also was part of the two-day National Research Summit on Care, Services and Supports for Persons with Dementia and Their Caregivers held in Washington, DC. Senior Vice President, David M. Bass, PhD, Assistant Director, Carol J. Whitlatch, PhD, and Adjunct Senior Research Scientist, Katherine Judge, PhD, faculty member at Cleveland State University, were among the presenters from across the country who shared their expertise and insights. In addition to presenting, Dr. Bass co-chaired a session titled “Involving Persons with Dementia as Study Participants.”

Results of the two-day summit were used to develop recommendations for research priorities for investigators, policy makers and funders to ensure that evidence-based programs that improve care are used now and that innovation continues into the future.

The report from the summit is available at aspe.hhs.gov/national-research-summit-care-services-and-supports-persons-dementia-and-their-caregivers.

The 2017 Benjamin Rose Caregiving Conference followed up on the National Summit, reviewing and expanding upon summit recommendations and exploring how they are likely to impact future research and services on care and caregiving. The Summit Co-Chair, Katie Maslow, MSW, Visiting Scholar, The Gerontological Society of America, and Summit Advisory Committee member, Sarah Lenz Lock, JD, Senior Vice President for Policy, AARP, served as keynote speakers. A panel of local researchers and service organizations discussed how innovations in the care-related research and quality services underway in northeast Ohio are responding to and informing recommendations from the National Summit. The conference was presented with support from AARP.
Evidence-based programs for dementia caregiving can help improve the ability of family and friends to assist a relative with dementia. However, most organizations that serve people with dementia and their caregivers are unaware of these programs or do not know how to access them. To address this challenge, Benjamin Rose Institute on Aging and partners at the San Francisco-based Family Caregiver Alliance began to develop a web-based resource to help health and social service organizations compare, select and implement evidence-based programs for dementia caregiving. Work began in May 2017 thanks to a $500,000 grant from The John A. Hartford Foundation. Additional grants received from Archstone Foundation ($200,000) and The Retirement Research Foundation ($121,074) completed funding for the 30-month project.

The Center for Research and Education at Benjamin Rose is leading the effort to develop content for the Online Resource, reviewing 50 or more evidence-based programs designed to help families dealing with a dementia diagnosis. The Family Caregiver Alliance will lead the development of the website to help organizations compare and access programs. Ultimately, the Online Resource will be a clearinghouse for information on programs, including the real-world experiences of organizations and providers that have implemented these programs.

More information at benrose.org/news.
Benjamin Rose Institute on Aging joined partners locally and nationally in several advocacy activities throughout the year to ensure that vital services and supports remained available to older adults and caregivers. When cuts to home-delivered meals programs and congregate meals were threatened, Benjamin Rose issued advocacy alerts, shared fact-based information and testimonials about senior hunger with local, state and federal legislators, and participated in social media campaigns such as #SaveLunch.

Benjamin Rose worked for elder justice, supporting the Elder Justice Act and working with partners at the Elder Justice Coalition to provide educational opportunities, such as a webinar on funding for the act and a public forum, Addressing Aging Policy: Looking Forward with a New Administration.

Locally, Benjamin Rose became an active member of the Cuyahoga County Scam Squad to raise awareness about scams among families, co-hosted a forum on Elder Abuse with the county Adult Protective Services, and hosted a consumer program to help older adults and caregivers recognize and avoid frauds and scams.

The expertise and leadership Benjamin Rose provides nationally in the area of aging policy was recognized when President and CEO Richard Browdie was named a 2017 Influencer in Aging by Next Avenue, public media’s digital publication covering issues for people 50 and older. Each year, Next Avenue recognizes 50 advocates, researchers, thought leaders, innovators, writers and experts who continue to push beyond traditional boundaries and change the understanding of what it means to grow older. Browdie has spent 40 years advocating for the health and well-being of older adults, including his 16-year tenure as President and CEO of Benjamin Rose as well his service as the president of the American Society on Aging, the executive director of the National Association of Area Agencies on Aging and Pennsylvania’s Secretary of Aging.

The latter program was co-hosted with partner and now-subsidiary ESOP, Empowering and Strengthening Ohio’s People. ESOP Executive Director Roslyn Quarto was named Vice President of Advocacy for Benjamin Rose at the time of the merger.

More information at nextavenue.org/influencers.
** SOURCES OF PROGRAM SUPPORT **

$12,659,000*

- **Eldercare Services Institute, LLC Income**
  - $2,062,000  | 16.3%
- **Income from Trusts**
  - $4,332,000  | 34.2%
- **ESOP & ESOP Realty**
  - $75,000  | 0.6%
- **Benjamin Rose Property, LLC Income**
  - $126,000  | 1.0%
- **Research**
  - $204,000  | 1.6%
- **Interest and Dividends**
  - $518,000  | 4.1%
- **Margaret Wagner Apartments**
  - $612,000  | 4.8%
- **Rose Centers for Aging Well**
  - $1,227,000  | 9.7%

** Contributions**

$1,986,000  | 15.7%

** Include in-kind gifts

* 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.

** COSTS OF PROGRAM SERVICES **

$15,285,000
2017 FUNDING SOURCES

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The Cleveland Foundation
Corporation for National and Community Service
Cuyahoga Arts & Culture
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U.S. Department of Health and Human Services: Administration for Community Living
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A VISION FOR AGING WELL

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.

OUR GOALS

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

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.

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

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

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

Adopted by the Board of Directors in April 2016, the 2016-2020 Strategic Plan of the Benjamin Rose Institute on Aging 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.