



BENJAMIN  ROSE

Let's rethink aging.

2023 Annual Report

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About this book

This is the 2023 Annual Report of Benjamin Rose and its subsidiaries: Benjamin Rose Property, LLC; Eldercare Services Institute, LLC; ESOP (Empowering and Strengthening Ohio’s People); Margaret Wagner Apartments; Rose Centers for Aging Well, LLC

Let’s rethink aging.

For more than a century, Benjamin Rose has served as a trusted partner in the aging journey for individuals of all backgrounds as well as those who care for them. In this annual report, we invite you to **rethink** what it means to grow older. Because “aging” does not mean “old.” Aging is a journey we all are taking, together.

This was the inspiration behind our new identity, which is centered around a rousing call to action: **Let’s rethink aging.** We applied this energizing approach to how we talk about our invaluable service pillars, our extraordinary teams and the wonderful people we serve. You can see it woven throughout this report and in all our external communications.

Because to **rethink** aging is to acknowledge that we age differently. There are vast differences in life expectancy, health and ability within the population. There are also great differences in our perceptions about aging and being old. Some people will not seek out support from a “senior center” because they do not see themselves as seniors or elderly. Others may not identify themselves as part of the target audience because they define their needs differently. **Rethinking** aging is an opportunity to challenge assumptions and expectations about age and aging, and to reconsider the strengths and capabilities of others.

When we say, “**Let’s rethink aging,**” it is an invitation to participate. The challenges and opportunities for older adults and the people who care for them seem very different today from what they were in 1908. Throughout our history, Benjamin Rose has adapted to meet the evolving needs of the community. This evolution is possible because of engaged donors, volunteers, community partners and the people we serve who help promote the health and dignity of all of us who are on the aging journey.

Thank you for being part of our story, and our ongoing conversation.



Sarah Dimling
Board Chair



Orion Bell
President & CEO

Brand Revisions

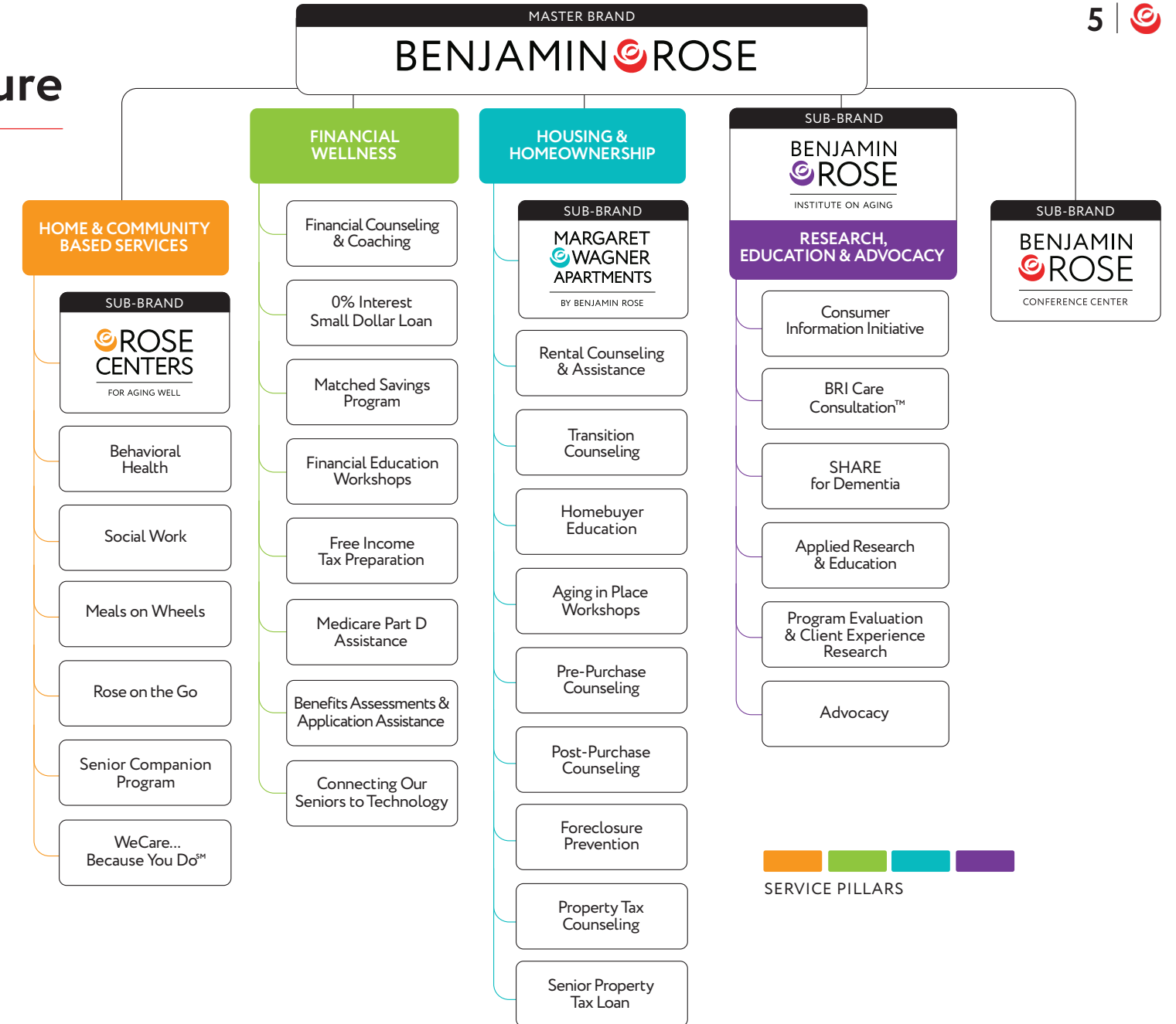
In 2023, we embarked on a journey to (re)introduce Benjamin Rose. Why? Because how we support the aging journey continues to evolve. And to make the experience with us easier to navigate and to prepare for future growth, we've done some streamlining, renaming and reorganizing. All that to say, the community and professionals are still able to access all the offerings that aging adults and those who care for them have grown to know and trust.



Here are just a few of the ways we've progressed:

- A refreshed brand look and feel, as well as a new tagline.
- Cohesive and consistent logo redesigns.
- Reorganization of our offerings into four clear and distinct service pillars.
- Thoughtful phasing out of the ESOP name, with all programs and services continuing to be delivered by Benjamin Rose.
- Stronger linkage between Margaret Wagner Apartments and Benjamin Rose.
- Renaming of Home Delivered Meals to Benjamin Rose Meals on Wheels to leverage our affiliation and tie the program to the overarching brand.
- The launch of a community-focused advertising campaign in Cuyahoga County.

Brand Architecture



SERVICE PILLARS

2023 Highlights



Total Benjamin Rose Clients Served: 203,880
Total Number of Intake Referrals: 3,678



Financial Wellness

- Assisted **1,830 households** through financial education workshops and one-to-one counseling sessions.
- Filed **982** Federal returns resulting in **\$1,064,136** in tax refunds.



Housing & Homeownership

- Provided safe, comfortable and affordable housing to **47 older adults** in our Margaret Wagner Apartments.
- Presented our homeownership workshop series to **615 attendees**.



Benjamin Rose Institute on Aging

- **Made 102 presentations** at international, national or state conferences.
- **Engaged 5,815** individuals with the Institute's research studies and products, including participants and trained delivery staff.

2023 Highlights



Community Outreach and Engagement

- Number of community events attended: **120**
- Number of interactions: **5,483**



Volunteers

- Number of volunteers: **212**
- Hours of volunteer service: **20,644**



Home & Community Based Services

- Total meals served: **249,105**
- Meals on Wheels and senior centers total clients: **1,678**
- Number of senior centers: **6**
- Number of clients from WeCare: **369** total clients **232** of whom were new.

2023 Funding Sources

- A**
 - Administration for Community Living
 - Alcohol, Drug Addiction & Mental Health Service (ADAMHS) Board of Cuyahoga County
 - Alzheimer's & Dementia Care Services of Northwestern Ohio
 - Alzheimer's San Diego
 - Archstone Foundation
 - Arthur N. Rupe Foundation
- B**
 - Bay Aging - Area Agency on Aging
 - Buckeye Health Plan
- C**
 - CareSource
 - Case Western Reserve University
 - City of Cleveland
 - City of Cleveland Heights
 - City of Shaker Heights
 - Collaborative Approach to Public Goods Investments
- D**
 - Department of Health & Human Services (DHHS), Centers for Medicare & Medicaid Services (CMS)
- E**
 - Enterprise Community Partners
- F**
 - Federal Home Loan Bank of Pittsburgh
- H**
 - Heartstone Institute, LLC
 - Hopeful Aging, LLC
- I**
 - iDesign
 - IMPACT Solutions
- J**
 - John A. Hartford Foundation
- L**
 - LifeBio, Inc.
- M**
 - McGregor PACE
 - Medical Mutual
 - Mental Health America of Northern Kentucky & Southwest Ohio
 - Molina Healthcare
- N**
 - National Community Reinvestment Coalition
 - Northeast Ohio Medical University
- O**
 - Ohio Department of Medicaid
 - Ohio Department of Budget Management
 - Ohio Department of Administrative Services and Ohio State University
 - Ohio Department of Aging
 - Ohio Housing Finance Agency (OHFA)
 - Ohio Mental Health Addiction Services

2023 Funding Sources

- O**
 - Ohio State Bar Foundation
 - Oklahoma Department of Human Services
 - Older Americans Act, Title III
 - Optum
- P**
 - PASSPORT Medicaid Waiver
- R**
 - RRF Foundation for Aging
- T**
 - The Ohio State University
 - The National Institute on Aging
 - The Oasis Institute
 - TRIO Community Meals
- U**
 - U.S. Department of Health & Human Services
 - U.S. Department of Housing & Urban Development
 - U.S. Department of Agriculture
- V**
 - UCLA - Patient-Centered Outcomes Research Institute (PCORI)
- U**
 - United Healthcare
 - United Way of Greater Cleveland
 - University of Southern California
- W**
 - Village of Oakwood
 - Western Reserve Area Agency on Aging

We have made every effort to ensure the information in this report is accurate. If you find any errors or omissions, please report them to us for resolution at info@benrose.org. Grants are recognized at full value in the year they are awarded.



The Legacy Society

Members of the 1908 Legacy Society have included Benjamin Rose 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 Benjamin Rose in your estate plans but do not see your name listed, please contact Audra Bennett at (216) 373-1608 or abennett@benrose.org. We would like to honor your commitment and dedication to Benjamin Rose.

We have made every effort to ensure the information in this report is accurate. If you find any errors or omissions, please report them to us for resolution at info@benrose.org.

Alice J. Kethley*

Aloise O. Bates*

Barbara Y. & Peter L.* Galvin

Catherine R. Gerbic*

Dale M. & Joyce E. Rothenberger, Jr.

Darleen McGeady

Dorothy M. Young*

Edward H. Richard

Eleanor Delores Santos Estate*

Emily Drake

Faye M. Shapero*

George McGaughey* &
Sarah Ott-Hansen

Henry & Anne* Ott-Hansen

Jackson G. Simpson*

Kathryn L. & James Kaesberg

Linda A. Richard-Schenk

Linda S. Noelker

Lois H. Cole*

Marcia J. Wexberg, Esq. &
Kenneth D. Singer

Mary & Oliver Emerson*

Mary F.* &
William Conway

Phyllis J. Colarusso*

Polly Clemo

Raymond Lusin*

Robert L. & Barbara
A. Oldenburg*

Robin & David Gunning

Ruth B. Fiordalis

Sue Dempsey

Thomas* & Judith Gruber

10 | 

Donors

11 | 

Chairperson's Circle (\$100,000+)

- Cuyahoga County
- The Edwin T. & Mary E. Hamilton Fund
- Arthur N. Rupe Foundation

President's Circle (\$25,000 - \$99,999)

- The Cleveland Foundation
- Mary F.* & William Conway
- The Norma Witt Jackson Fund
- Meals on Wheels America
- Ohio Department of Mental Health & Addiction Service
- U.S. Bank Foundation

Champion's Circle (\$10,000 - \$24,999)

- Anonymous
- Citizens Bank
- The Cleveland Clinic Foundation

- The Eva L. & Joseph M. Bruening Foundation
- The Hankins Foundation
- The Higley Fund
- The Huntington Foundation
- JPMorgan Chase & Co.
- KeyBank Foundation
- Kirk Schmink & Mary Beth Majoros
- Medical Mutual of Ohio
- National Community Reinvestment Coalition
- Third Federal Savings & Loan
- Union Home Mortgage Foundation
- The White Barr Fund

Advocates (\$5,000 - \$9,999)

- The Andrews Foundation
- Orion & Buffy Bell
- Cuyahoga Arts and Culture
- Dominion Energy Charitable Foundation
- John Farmer
- The Murphy Family Foundation

- PNC Foundation
- The Samuel H. & Maria Miller Foundation
- Kathy Smachlo
- The Thatcher Family Fund
- Kathie & Jason Yurgel

Stewards (\$2,500 - \$4,999)

- Nancy A. Adams
(In memory of Orion H. Bell III)
- Calfee, Halter & Griswold, LLP
- Dunn Solutions Group
- First Federal Lakewood
- The Frances Lennie Snider Memorial Fund
- The Herbert F. Leisy Fund
- HW&Co.
- PNC Bank
- Elizabeth F. & Frederick Stueber
- U.S. Bank
- Western Reserve Area Agency on Aging

* Deceased

Donors

Benefactors (\$1,000 - \$2,499)

- Katherine Barr Hollingsworth & Adam Hollingsworth
- Audra & Matt Bennett
- Michelle Bentzien-Purrington & Ronald Purrington
- Michael M. Billnitzer
- Brokaw
- Kathryn J. Bryan & Mark A. Aronica
- Charles Schwab & Co., Inc.- Legacy Village
- Edith W. Corning*
- David and Inez Myers Foundation, a supporting foundation of the Jewish Federation of Cleveland
- Belva Denmark Tibbs & Marc Tibbs
- Sarah M. Dimling
(In memory of Orion H. Bell III)
- Diane Downing & Thomas D. Corrigan
- Emily Drake
- Cynthia H. Dunn & Dale Cuthbertson
(In memory of Orion H. Bell III)
- Enterprise Community Partners
- Greater Cleveland Food Bank
- Gina K. & David Gunning
- Huntington National Bank
- Hyster-Yale Materials Handling
- Dwight S. & Patricia Jordan
- Kathryn L. & James Kaesberg
- Kiwanis Club of Cleveland, Inc.
- The Legal Aid Society of Cleveland
- The Lozick Family Foundation
- Lori A. & Richard Lozier
- Mary & Brian Marita
- Jennifer & Dale Markworth
- Matz, Blancato & Associates Inc.
- Eileen McConville
- William Minnich
- Frank S. Novak
- Hermine & David Ostro
- Edward Richard
(In memory of Henry Richard)*
- Dale M. & Joyce Rothenberger
(In memory of Alma Rothenberger)*
- SAP Ariba
- Thompson Hine LLP
- Union Miles Development Corporation



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Donors

Patrons (\$500 - \$999)

- Anonymous
- Nancy M. Barnes
- David Bass & Katherine Judge
(In honor of Jane Carmody)
- Doug Beach
- Benjamin Rose Institute on Aging
(In memory of Selma A. Baron & Robert L. Kaufmann*)*
- Case Western Reserve University
- Center for Community Solutions
- The Cleveland Clinic
- The Cleveland Clinic- Euclid Hospital
- Geoffrey Dampeer
(In memory of G.B. Kennerdell)*
- Division of Senior and Adult Services
- Muhammad & Farida Ejaz
- Ruth B. Fiordalis
- Patricia R. Frutig
- Robin & David Gunning
- Hickman Lowder Lidrbauch & Welch Co., L.P.A.
- Mary Ruth & Joseph Hill
- The Hinds Memorial Fund
- Home Instead Senior Care
- MetroHealth Medical Center
- William A. & Kathryn G. Meyer
- NFP Corp.
- Sue & Dale Omori
- Henry Ott-Hansen
- S. Colin G. & Lindsey Petry
(In memory of Samuel R. Petry)*
- PNC Foundation Matching Gift Program
- Rita Roth & Michele Roth-Kauffman
- Saber Healthcare Group
- Janet Schneider
- John & Sally Schulze
- Thomas C. & Amy Scott Gilchrist
- ServeOhio
- Skylight Financial Group
- Gretchen D. Smith
- StreamlineCLE
- Frederick & Joyce Tavill
- Kate Toma
- Tiffinae Ware
- Marcia J. Wexberg & Kenneth D. Singer

Gifts In-Kind

- Jennifer Markworth
- MetroHealth Medical Center
- Summa Health



We are grateful to our Sponsors (\$250 – \$499) and Friends (up to \$249) for their support. A full list can be found on our website at www.benrose.org/2023donors.

* Deceased

Financial Statements

Year ending December 31, 2023

Sources of Program Support 2023:

\$13,111,701



Income from Trusts: \$4,894,297

Program Revenue: \$3,276,336

Grants: \$2,759,703

Interests and Dividends: \$1,114,957

Contributions: \$1,029,922

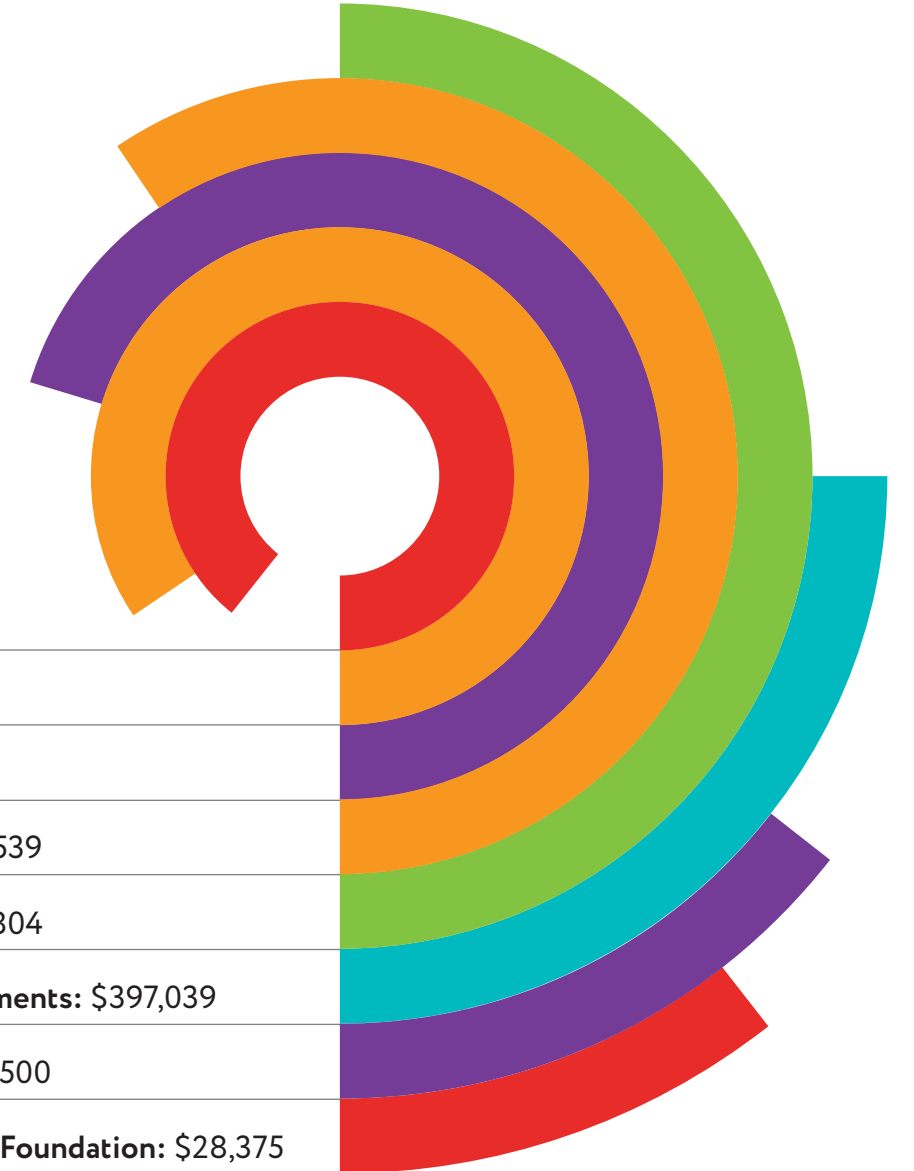
Other Income: \$36,486

Financial Statements

Year ending December 31, 2023

Costs of Program Services 2023:

\$14,063,499



Administration & Support: \$3,596,558

Rose Centers for Aging Well, LLC: \$3,280,330

Research: \$2,919,354

Eldercare Services Institute, LLC: \$2,092,539

ESOP & Branches Realty: \$1,659,804

Margaret Wagner Apartments: \$397,039

Advocacy: \$89,500

SPRY Foundation: \$28,375

Other Changes in Income

Forgiveness of real estate taxes: \$250,432
 Loss on sale of property and equipment: \$2,387,472
 Net increase in other changes of income: \$13,841,933
 Realized and unrealized gain on investments: \$4,622,187
 Increase in beneficial interest in charitable perpetual trusts: \$11,356,786

Our Mission

To serve as a trusted partner in the aging journey for individuals of all backgrounds as well as those who care for them.

Our Vision

A world where no one is forgotten, and everyone is supported in the aging journey.

Our Core Values

Knowledge Sharing: Actively sharing research and service expertise for the greater good.

Adaptability: Creatively responding to the evolving needs of older adults in a dynamic environment.

Reliability: Remaining cognizant of other's needs, always delivering as promised.

Compassion: Dedicated to listening first, creating a sense of belonging and offering a safety net for those who need it.

Respect: Embracing individuals of all backgrounds and having openness to the thoughts and opinions of others.

Our Statement on Racial Equity and Social Justice

Benjamin Rose strives to achieve racial equity and social justice, which are essential for ensuring healthy aging for all, through our research, consumer-responsive services and client advocacy.

Our Goals

- 1** | Promote and support Board engagement, leadership development and diversity for strong, representative governance.
- 2** | Establish Benjamin Rose as an Employer of Choice and a diverse and inclusive workplace that engages the talents of all employees to advance our mission.
- 3** | Expand our applied research, consumer education programs and development of innovative solutions for older adults and caregivers.
- 4** | Develop and implement a methodology for enhanced collaboration between research and services at Benjamin Rose.
- 5** | Increase the revenue, reach, accessibility, consumer focus and impact of Benjamin Rose services.
- 6** | Increase national and regional awareness of Benjamin Rose and our research, services and impact.
- 7** | Improve financial sustainability to enable Benjamin Rose to pursue its mission in a rapidly changing environment.

Leadership

Board of Directors

Officers

Sarah M. Dimling, Chair

Belva Denmark Tibbs, Vice Chair

Annapurna Valluri, PhD, Treasurer

Constance Hill-Johnson, Secretary

Nancy A. Adams, Past Chair

Nancy M. Barnes

Katherine Barr Hollingsworth

Kathryn Bryan, PhD

Teresa Dews, MD

Diane Downing

Patricia R. Frutig

Gina K. Gunning

Mona Gupta, MD

Yvette M. Ittu

Kathryn L. Kaesberg

Hermine Krasny

Denise M. Kresevic, PhD

Lori A. Lozier

Jennifer I. Markworth

Eileen McConville

Sue Omori

Amy Scott Gilchrist

Elizabeth F. Stueber

Tiffinae Ware

Benjamin Rose

Orion H. Bell IV, MBA

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Senior Vice President of Research & Education

Audra Kessler Bennett

Vice President of Institutional Advancement

Michael Billnitzer, SHRM-SCP

Vice President of Housing & Financial Wellness

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Senior Vice President & Chief Financial Officer

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Vice President of Health & Wellness

Mary S. Marita, LNHA, MHSA

Senior Vice President & Chief Operating Officer

Janet Schneider, MLRHR

Vice President of Human Resources & Corporate Compliance Officer





FOR QUESTIONS, PLEASE CONTACT: AUDRA BENNETT
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