



Meeting needs. Strengthening lives.

2025 Annual Report

BENJAMIN
& ROSE



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ABOUT THIS REPORT:

This is the 2025 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, L.P.
- Rose Centers for Aging Well, LLC



Mission, Vision & Core Values

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 others’ 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.

Message from the Board Chair and CEO

MEETING NEEDS. STRENGTHENING LIVES.

In 1908, the Benjamin Rose Institute was established through the will of businessman and philanthropist Benjamin Rose to enable older adults to “maintain their comfort and dignity.” These simple words have guided the mission of the organization for more than a century. Over the years, the programs of Benjamin Rose have continued to evolve as we fulfill our mission through four service pillars: Home and Community Based Services; Financial Wellness; Housing and Homeownership; and Research, Education and Advocacy. These services have helped us both to meet the needs and strengthen the lives of the older adults and caregivers we serve.

Let’s break down what we mean by that:

Meeting Needs. A hot meal, a friendly visit, a counseling session, an exercise class, a safe place to call home. Benjamin Rose addresses the physical, mental and social needs of older adults and the people who care for them. This year’s annual report highlights examples of those services, along with providing data about the scope and scale of our work. An accounting of meals distributed, trips provided, classes held and people served. The numbers matter, providing evidence of not only need, but of the power of philanthropy, collaboration and partnerships that make meeting those needs possible. All with a goal of strengthening lives

Strengthening lives. A homebound older adult who does not have to worry about their next meal. A daughter making a care plan for her mother living with dementia with the support of a care navigator. The satisfaction of holding the keys to your own home. A volunteer finding purpose through service to others. A donor investing in the quality of life in their community. All are examples of lives strengthened by assuring physical, mental, financial and emotional needs are met.

Thank you for your support of Benjamin Rose. And for your part in meeting needs and strengthening lives of older adults in the community.



Belva Denmark Tibbs
Board Chair



Orion H. Bell
President and CEO



2025 Highlights

222,805
4,374 Total Benjamin Rose Clients Served
Total Number of Intake Referrals



Home & Community
Based Services

Delivered **204,920** nutritious meals to the homes of **1,332** older adults, supporting health and independence.

Served **49,346** nourishing congregate meals and provided enriching programs to **490** older adults at seven Rose Centers for Aging Well locations.

Provided **3,470** hours of support for **546** family and friend caregivers, helping them navigate the complexities of caregiving with personalized guidance, trusted resources and ongoing support through our WeCare...Because You DoSM program.



Financial Wellness

Guided **782** households in filing their federal tax returns, saving them **\$275,000** in preparation fees and securing more than **\$2,000,000** in total tax refunds.

Delivered **600** personalized financial counseling and coaching sessions to **400** clients, empowering individuals to strengthen credit, reduce debt and build a path toward long-term financial stability.

2025 Highlights

698,779 Total Units of Service
(includes, but not limited to: meals served, recreation, calls, emails, referral portals, etc.)



Housing &
Homeownership

Provided **74** older adults with safe, comfortable and affordable housing at Margaret Wagner Apartments, offering stability and the opportunity to age within a supportive community.

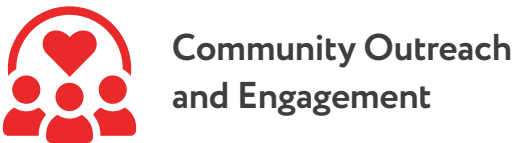
Equipped **187** individuals across Cuyahoga County with the knowledge and tools for successful homeownership through targeted workshops.



Benjamin Rose
Institute on Aging

Authored and presented **127** articles and presentations across international, national and state platforms, advancing thought leadership and sharing expertise in aging.

Reached **35,741** individuals through research initiatives, practical tools and professional training designed to improve the lives of older adults.



Community Outreach
and Engagement

Connected with **5,820** individuals through **125** community events, raising awareness and connecting people to the services and support they need to thrive.



Volunteers

Mobilized **296** dedicated volunteers to give **36,006** hours of service supporting older adults in meaningful ways, from delivering meals to offering companionship.



2025 Funding Sources

A	• The Administration for Community Living (ACL)	C	• Cuyahoga Arts and Culture	M
	• Alcohol, Drug Addiction & Mental Health Service (ADAMHS) Board of Cuyahoga County		• Cuyahoga County Division of Senior and Adult Services (DSAS)	
	• Alzheimer’s & Dementia Care Services of Northwestern Ohio	D	• Department of Health & Human Services (DHHS), Centers for Medicare & Medicaid Services (CMS)	
	• Alzheimer’s San Diego		• DigitalC	
	• Archstone Foundation	E	• Enterprise Community Partners	
B	• Arthur N. Rupe Foundation	H	• Heartstone Institute LLC	O
	• Bay Aging - Area Agency on Aging		• Helen C. Cole Charitable Trust	
	• Better Health Partnership		• The Higley Fund	
	• Buckeye Health Plan		• Huntington Bank	
	• The Callahan Foundation		• Huntington Bank Foundation / Ohio Capital Impact Corporation for Housing	
C	• CareSource	I	• IMPACT Solutions	P
	• Case Western Reserve University		• Isaac Health	
	• Centers for Medicare & Medicaid Services	J	• The John A. Hartford Foundation	
	• City of Cleveland		• Joseph and Mary ‘s Home	
	• The Cleveland Clinic Foundation	K	• KeyBank Foundation	
	• Collaborative Approach to Public Goods Investments	M	• Kiwanis Club of Cleveland, Inc.	R
	• Community Care Corps		• McGregor PACE	
	• Corporation for National & Community Service		• Meals on Wheels America	
			• Medical Mutual of Ohio	
				S



2025 Funding Sources

T	• Tembo Health	U	• University of California Los Angeles (UCLA) Patient-Centered Outcomes Research Institute (PCORI)
	• Thatcher Family Fund		• Union Home Mortgage Foundation
	• The Community Builders, Inc.		• United Healthcare
	• The National Institute on Aging		• United Way of Greater Cleveland
	• The Oasis Institute		• University Hospitals
U	• The Ohio State University	W	• University of Southern California
	• Third Federal Foundation		• US Bank
	• TRIO Community Meals		• Western Reserve Area Agency on Aging
	• U.S. Department of Health & Human Services		
	• U.S. Department of Housing & Urban Development		

“There are very few places in life where you can go and not be judged. But, group [therapy] is that safe space. I’m so grateful Tahira connected me to it years ago-and for being a lifeline when I needed it most.”

~ Joyce Thomas | Behavioral Health Services client



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 Rose Society

Established in 2025, The Rose Society honors a distinguished community of donors who invest \$1,000 or more annually in Benjamin Rose. Their generosity is more than a gift: it is a sustained commitment that ensures older adults in our community can live with comfort, dignity and independence, and for caregivers to receive the support and services they need. We are proud to recognize these individuals and couples whose leadership and compassion bring Benjamin Rose’s mission to life year after year.



“Get out and try it at least once. This is a great thing, and as we go through changes in our lives, it’s nice to continue to form connections.”

~ Emma Ransom (center) | Rose On the Go participant

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The Rose Society

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 - Orion & Buffy Bell
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 - Michelle Bentzien-Purrington & Ronald Purrington
 - Michael M. Billnitzer
 - Robert Bloom
 - Semanthie & Sylvester Brooks
 - Kathryn J. Bryan & Mark A. Aronica
 - G. Geoffrey Dampeer
 - Belva Denmark Tibbs & Marc Tibbs
 - Teresa Dews
 - Sarah M. Dimling
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 - Emily Drake
- Cynthia H. Dunn & Dale Cuthbertson
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 - Mary Ruth & Joseph Hill
 - Constance Hill-Johnson
 - Katherine Barr Hollingsworth & Adam Hollingsworth
 - Dwight & Patricia Jordan
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 - Jane Peterson & Philip Star
 - Elizabeth F. & Fredrick Stueber
 - Kathie & Jason Yurgel



*deceased



Donors

Chairperson's Circle (\$100,000 and Up)

The Edwin T. & Mary E. Hamilton Fund

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

Anonymous
The Cleveland Clinic Foundation
The Cleveland Foundation
The Huntington Foundation
The Norma Witt Jackson Fund
Third Federal Foundation
US Bank Foundation

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

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The Higley Fund
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PNC Bank
The Reinberger Foundation
United Way of Greater Cleveland

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

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BNY Mellon
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FIT Technologies
Forethought Life Insurance Company
Meals on Wheels America
Medical Mutual of Ohio
The O'Neill Brothers Foundation

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Vorys, Sater, Seymour & Pease LLP
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Western Reserve Area Agency on Aging
The White Barr Fund

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*deceased

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Visiting Angels Senior Homecare
Tiffinae Ware
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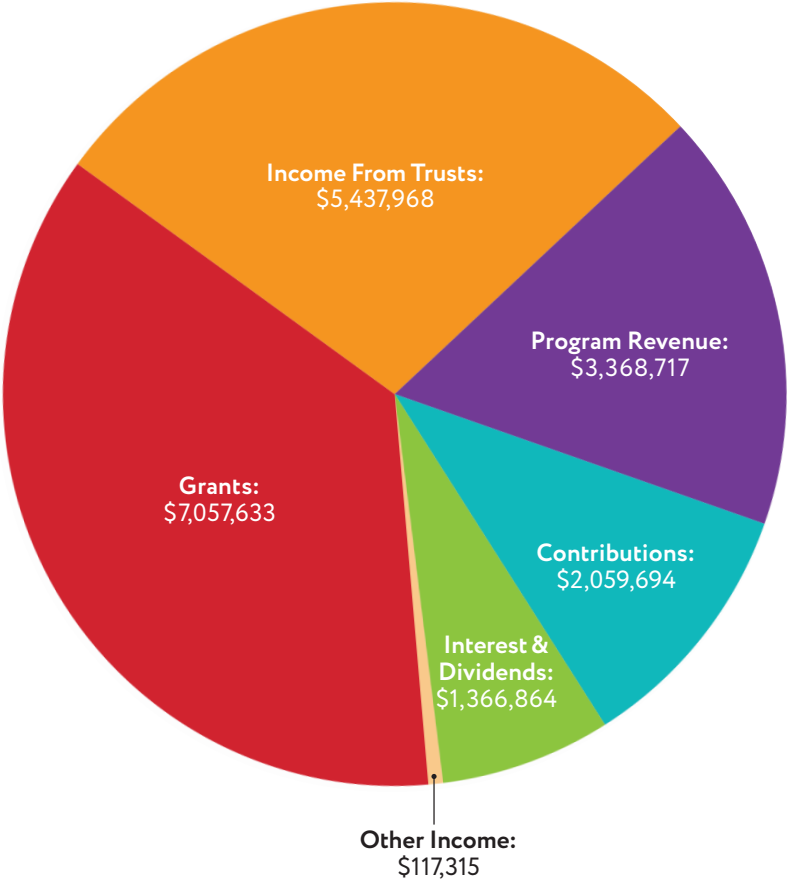
We are grateful to our Sponsors (\$250 - \$499), Friends (up to \$249) and in-kind donors for their support. A full list can be found on our website at www.benrose.org/2025donors.

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Financial Statements

Year Ending December 31, 2025
2025 SOURCES OF PROGRAM SUPPORT:

\$19,408,191

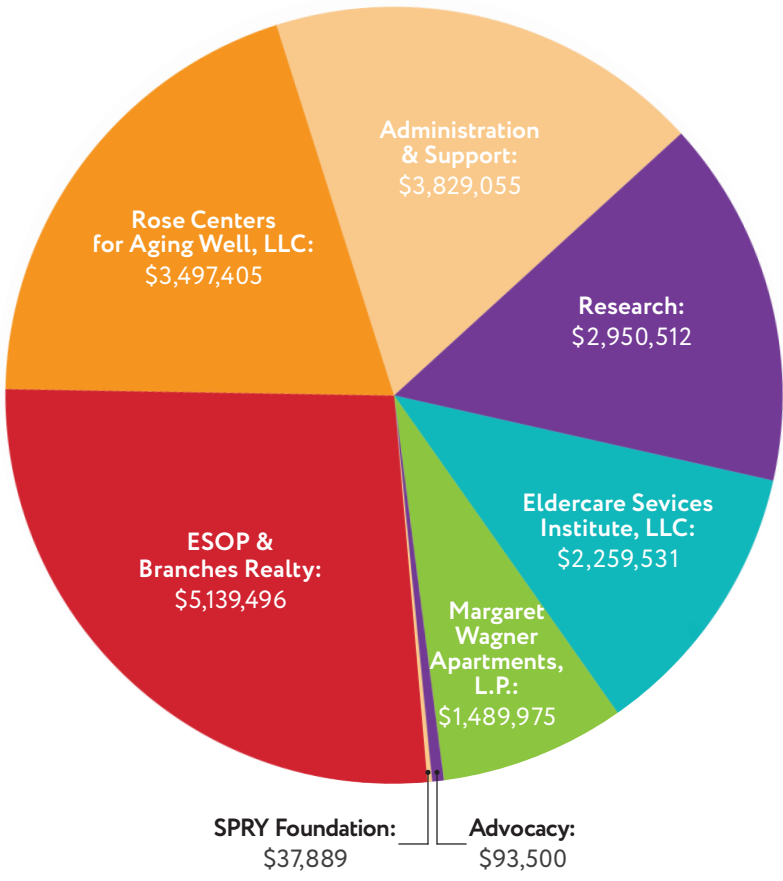


Other Changes in Income
Realized & unrealized gain on investments: \$5,275,415
Increase in beneficial interest in charitable perpetual trusts: \$8,631,169
Net increase in other changes of income: \$13,906,584
Net decrease in assets: \$14,638,340

2024-2025 Strategic Plan & Leadership

Year Ending December 31, 2025
2025 COSTS OF PROGRAM SERVICES:

\$19,297,363



- 1 Provide high quality, sustainable programs and services that are closely aligned with our mission.
- 2 Nurture, seek and develop partnerships that increase our program impact, financial support and visibility/awareness.
- 3 Ensure our financial sustainability through sound fiscal practices, efficient operations and effective management of risk.
- 4 Share stories that demonstrate the impact of our services and attract others to support our mission.
- 5 Develop and maintain effective board leadership and a high-performing workforce.

“I didn’t think I’d ever recover,
but you’re never too old to start over.”

~ Vanessa Jackson | Housing & Home Ownership client

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