



BENJAMIN  ROSE

Rewrite the story of aging.

2024 Annual Report



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About This Report

This is the 2024 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

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 CEO and Board Chair

This year's annual report from Benjamin Rose challenges us to rewrite the story of aging. When we say: "rewrite the story," we mean improve upon it. Reimagine it. Make it better.

Because age is more than just a number. And "old" doesn't mean "end."

Whatever our age, there are opportunities for new beginnings. Learning a new skill. Finding a new home. Getting involved as a volunteer. Or discovering new ways to improve the lives of family caregivers. We may challenge our ideas about aging or reconsider our personal experiences. We may find new ways to give back to our communities. We may make new plans for the future. Modest changes can lead to big results in health outcomes, financial stability and social connection.

Every day, older adults and family caregivers rewrite their stories through the service pillars of Benjamin Rose. It's what we mean when we challenge you to rethink aging. We add to that story every day. And, it's not a story that is written in stone. There are opportunities for all of us to write the next chapter in our own aging journey.

Thank you for your support in fulfilling our mission.



Sarah Dimling
Board Chair



Orion Bell
President & CEO



“Some people have a really hard time getting around where they live and they’re not close to a store. At least they get this one healthy meal that helps them survive.”

– **Nedra**, Meals on Wheels volunteer

2024 Highlights



174,363

Total Benjamin Rose Clients Served



Financial Wellness

Helped **922** low-to-moderate income residents file their federal tax returns — saving them **\$327,360** in filing fees and securing more than **\$2 million** in total tax refunds.

Provided **3,231** personalized financial coaching and counseling sessions, empowering individuals to improve credit, reduce debt and pay for long-term financial health.



Housing & Homeownership

Welcomed **74** older adults into safe, comfortable and affordable housing at Margaret Wagner Apartments — offering stability, dignity and a place to age in community.

Provided **\$6 million** in emergency aid awarded by Cuyahoga County to help older adults stay safely housed and connected to utilities.



Benjamin Rose Institute on Aging

Gave **76** presentations at international, national and state conferences to share our expertise.

Reached **5,754** individuals through Benjamin Rose Institute on Aging research studies, tools and training.

2024 Highlights



5,421 Total Number of
Intake Referrals



Community Outreach and Engagement

Connected with **6,495** individuals through **128** community events — building relationships, raising awareness and linking people to the services and support they need to thrive.



Volunteers

Engaged **206** dedicated volunteers who contributed **29,273** hours of their time — helping us deliver meals, share companionship and support older adults in ways that truly matter.



Home & Community Based Services

Delivered **194,425** nutritious meals — including **27,531** medically tailored meals — to **1,232** older adults helping them maintain their health, independence and dignity at home.

Served **42,938** meals and offered engaging programs to **587** older adults at six Rose Centers for Aging Well locations providing nourishment, connection and community.

Supported **484** family and friend caregivers — including **288** new participants — in navigating caregiving challenges with personalized guidance, trusted resources, and ongoing support through our WeCare...Because You Do programSM.

2024 Funding Sources

A	• Administration for Community Living	D	• Cuyahoga Arts and Culture	N	• Medical Mutual
	• Alcohol, Drug Addiction & Mental Health Services (ADAMHS) Board of Cuyahoga County		• Cuyahoga County Department of Development		• Meijer
	• Alzheimer's & Dementia Care Services of Northwestern Ohio		• Cuyahoga County Division of Senior & Adult Services		• Mental Health America of Northern Kentucky & Southwest Ohio
	• Alzheimer's San Diego	E	• DHHS: Centers for Medicare & Medicaid Services		• Molina Healthcare
	• Archstone Foundation		• Digital C	O	• National Community Reinvestment Coalition
B	• Arthur N. Rupe Foundation	F	• Enterprise Community Partners		• National Institute on Aging
	• Bay Aging - Area Agency on Aging	G	• Federal Home Loan Bank of Pittsburgh		• Northeast Ohio Medical University
C	• Buckeye Health Plan	H	• Guernsey County Senior Center		• Ohio Department of Budget Management
	• Case Western Reserve University	I	• Heartstone Institute LLC		• Ohio Department of Administrative Services
	• Centers for Medicare & Medicaid Services	J	• Hopeful Aging, LLC		• Ohio Department of Aging
	• City of Cleveland	K	• Huntington Bank Foundation / Ohio Capital Impact Corporation for Housing		• Ohio Department of Medicaid
	• City of Shaker Heights	L	• IMPACT Solutions		• Ohio Housing Finance Agency (OHFA)
	• Cleveland Clinic Foundation	M	• John A. Hartford Foundation		• Ohio Mental Health & Addiction Services (OHMHAS)
	• Collaborative Approach to Public Goods Investments		• Kiwanis Club of Cleveland		• Ohio State Bar Foundation
	• Community Care Corps		• LifeBio, Inc.		• Oklahoma Department of Human Services
	• Corporation for National & Community Service		• McGregor PACE		• Older Americans Act, Title III
			• Meals on Wheels America		

2024 Funding Sources

- Optum
- PASSPORT Medicaid Waiver
- RRF Foundation for Aging
- The Church of the Covenant
- The Community Builders
- The National Institute on Aging
- The Oasis Institute
- The Ohio State University
- TRIO Community Meals

- U.S. Department of Agriculture
- U.S. Department of Health & Human Services
- U.S. Department of Housing & Urban Development
- UCLA - Patient-Centered Outcomes Research Institute (PCORI)
- United Healthcare
- United Way of Greater Cleveland
- University of Southern California

- US Bank
- Western Reserve Area Agency on Aging



Donors

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

- The Edwin T. & Mary E. Hamilton Fund

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

- The Cleveland Clinic Foundation
- The Huntington Foundation
- Huntington National Bank
- The Norma Witt Jackson Fund
- Ohio Capital Impact Corporation (OCIC)
- Ohio Mental Health & Addition Services (OHMHAS)
- Third Federal Foundation
- U.S. Bank Foundation

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

- Anonymous
- Charter Communications
- Cross River
- DigitalC
- The Eva L. & Joseph M. Bruening Foundation
- The Hankins Foundation
- The Higley Fund
- JPMorgan Chase & Co.
- Meals on Wheels America
- Meijer

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

- Nancy A. Adams
- Orion & Buffy Bell
- The Callahan Foundation
- Elder Justice Coalition
- FIT Technologies
- Medical Mutual of Ohio
- The Murphy Family Foundation
- PNC Foundation
- The Samuel H. & Maria Miller Foundation
- Kirk Schmink & Mary Beth Majoros
- Third Federal Savings & Loan
- Union Home Mortgage Foundation
- Vorys, Sater, Seymour & Pease LLP
- Kathie & Jason Yurgel

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

- Anonymous
- Michelle Bentzien-Purrington & Ronald Purrington
- Calfee, Halter & Griswold, LLP
- Charles Schwab & Co., Inc.- Legacy Village
- Cleveland Clinic
- Cuyahoga Arts & Culture
- Sarah M. Dimling
- First Federal Lakewood

- Forethought Life Insurance Company
- The Frances Lennie Snider Memorial Fund
- The Herbert F. Leisy Fund
- The Hinds Memorial Fund
- HW&Co. CPAs & Advisors
- Elizabeth F. & Frederick Stueber
- The Thatcher Family Fund
- Thompson Hine LLP
- Western Reserve Area Agency on Aging
- Whole Foods Market

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

- Alcohol, Drug Addiction & Mental Health Service (ADAMHS) Board of Cuyahoga County
- Anonymous
- Nancy M. Barnes
- Katherine Barr Hollingsworth & Adam Hollingsworth
- Audra & Matt Bennett
- BNY Mellon
- Brokaw
- Kathryn J. Bryan & Mark A. Aronica
- Buckeye Health Plan
- Cleveland Housing Partners (CHN)
- Edith W. Corning*

Donors

- David & Inez Myers Foundation, a supporting foundation of the Jewish Federation of Cleveland
- Belva Denmark Tibbs & Marc Tibbs
- Theresa Dews
- Emily Drake
- Cynthia H. Dunn & Dale Cuthbertson
- Patricia R. Frutig
- GivingForce
- The Golden Group
- Gina K. & David Gunning
- Hickman Lowder Lidrbauch & Welch Co., L.P.A
- Mary Ruth & Joseph Hill
- Hyster-Yale Materials Handling
- Dwight & Patricia Jordan
- Kathryn L. & James Kaesberg
- Kiwanis Club of Cleveland, Inc.
- The Legal Aid Society of Cleveland
- The Lozick Family Foundation
- Lori & Richard Lozier
- Mary & Brian Marita
- Jennifer & Dale Markworth
- Matz, Blancato & Associates Inc.
- Eileen McConville
- Bea McPherson in memory of Helen R. McPherson*
- Craig & Mary Jo Morford

- Hermine & David Ostro
- Jane Peterson & Philip Star
- Project Finance Solutions LLC
- Edward H. Richard in memory of Ida Richard
- Dale M. & Joyce E. Rothenberger
- Ruggiero Wealth Management
- Skylight Financial Group
- Kathy Smachlo
- Visiting Angels Senior Homecare

Patrons (\$500 - \$999)

- Anonymous
- David Bass & Katherine Judge in honor of Katie Maslow
- Benjamin Rose Institute on Aging
- Michael M. Billnitzer
- Janice Brennan
- Citizens Bank
- The Cleveland Clinic – Euclid Hospital
- Geoffrey Dampier in honor of G.B Kennerdell*
- Diane Downing & Thomas Corrigan
- Ruth & Vincent Fiordalis
- Frank & Frances Porter Family Foundation
- Thomas C. & Amy Scott Gilchrist
- Robin & David Gunning

- Hiti, DiFrancesco & Siebold, Inc. (HDS)
- The Hope Network
- Intuition Robotics
- Lifelong Learning Corporation
- NFP Corp.
- Ohio Living
- Sue Omori
- Henry Ott-Hansen
- S. Colin G. & Lindsey Petry
- G. Todd & Julie Robie
- Saber Healthcare Group
- Janet Schneider
- John & Sally Schulze
- Christopher Sinagra
- StreamlineCLE
- Pamela Tropiano
- Tiffinae Ware
- Marcia J. Wexberg, Esq. & Kenneth D. Singer
- Cuyahoga County Division of Senior & Adult Services

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/2024donors.

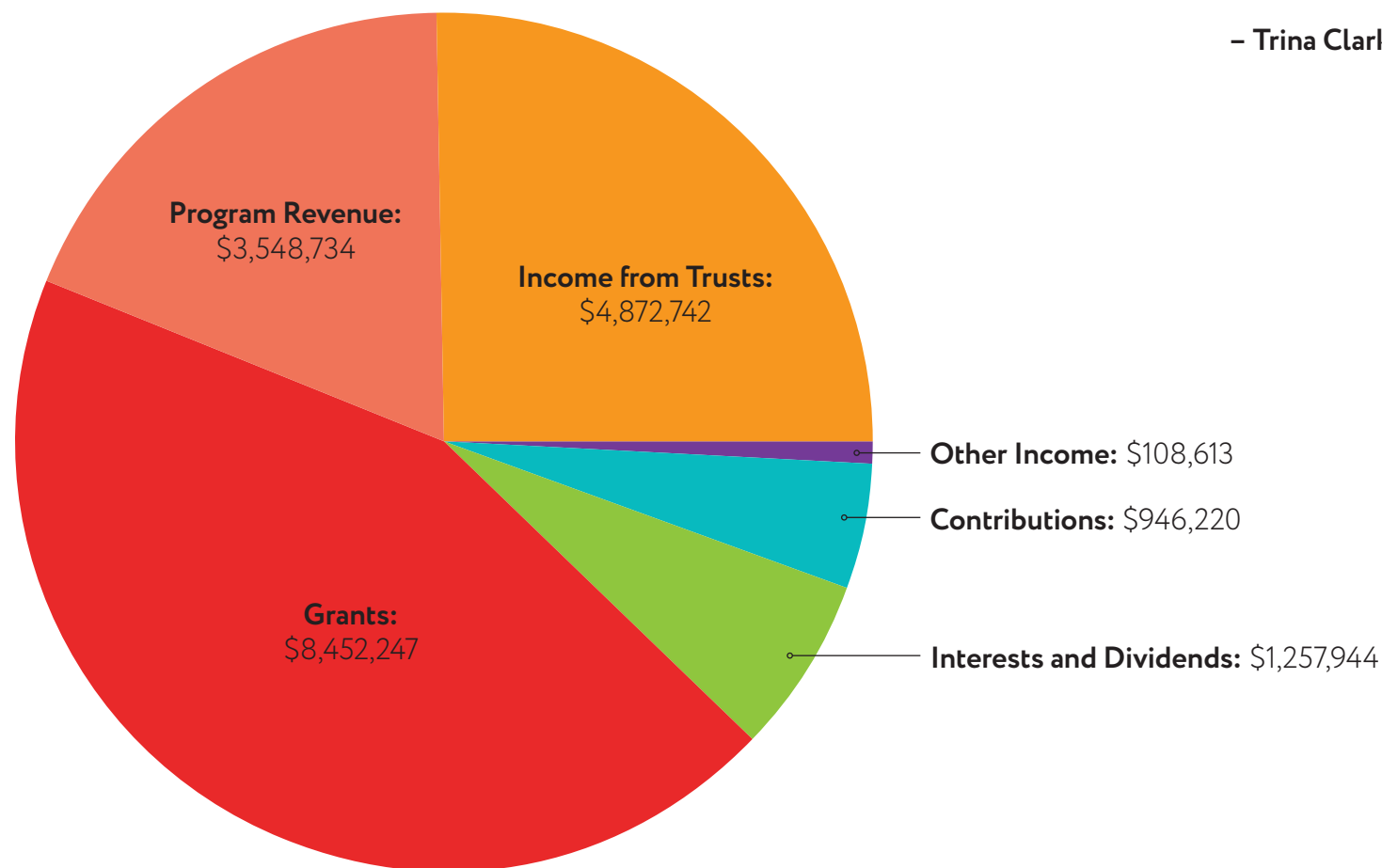
We have made every effort to ensure the information in this report is accurate. If you find any errors or omissions, please report them to us for resolution at info@benrose.org. Grants are recognized at full value in the year they are awarded.

Financial Statements

Year ending December 31, 2024.

2024 SOURCES OF PROGRAM SUPPORT:

\$19,186,500



*“There have been days when
I would not have eaten
if not for Meals on Wheels.”*

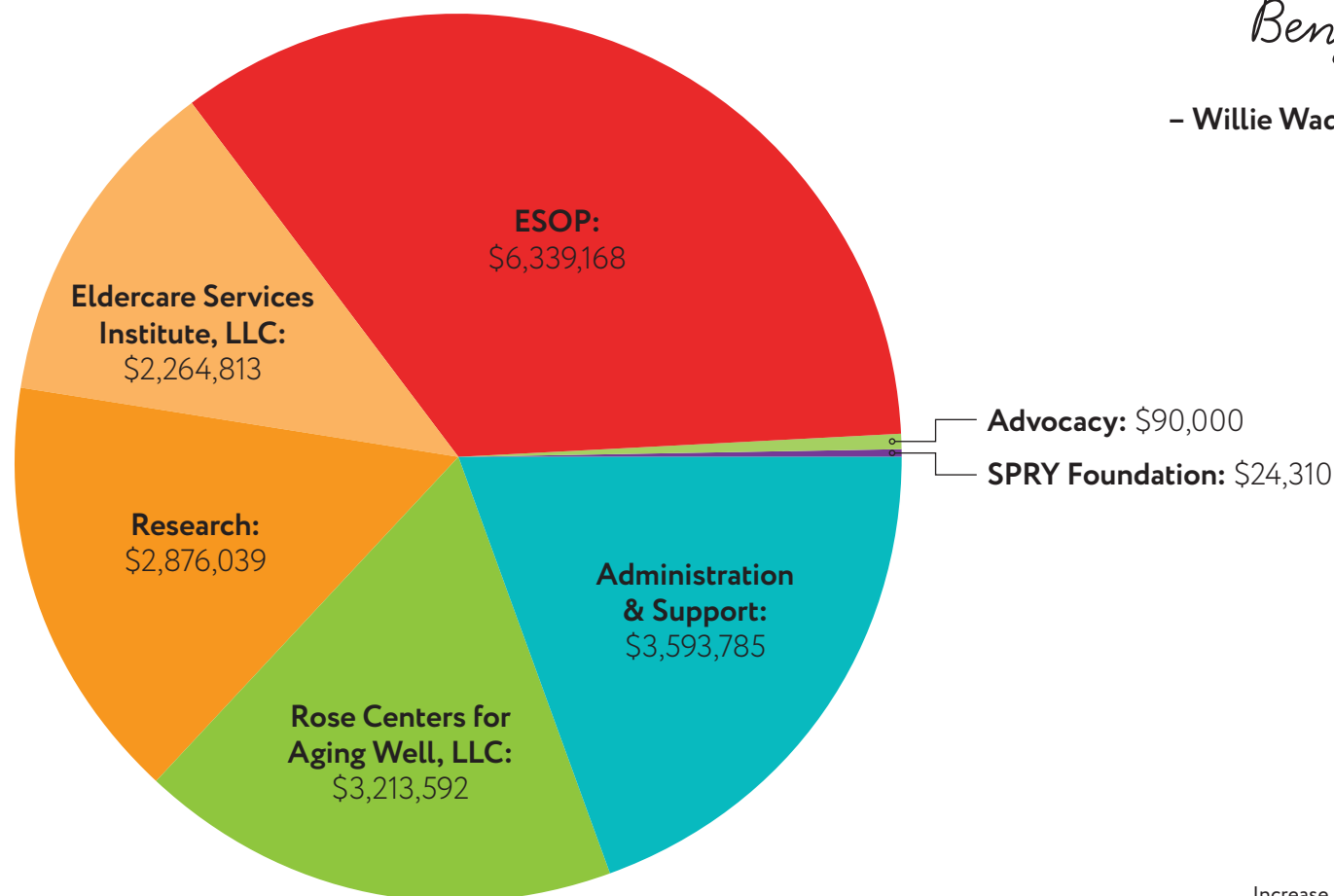
– Trina Clark, Meals on Wheels client

Financial Statements

Year ending December 31, 2024.

2024 COSTS OF PROGRAM SERVICES:

\$18,401,707



“I knew I had to find a way to resolve my financial problems, so I found a source - Benjamin Rose.”

– **Willie Wade**, homebuyer education client

Other Changes in Income:

Loss on sale of property and equipment: \$77,473
Net increase in other changes of income: \$11,139,584
Realized and unrealized gain on investments: \$3,640,908
Increase in beneficial interest in charitable perpetual trusts: \$7,576,149

2024-2026 Strategic Plan

Our Goals

- 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.

“Asking for help is not a weakness, it’s a strength. It allows you to tap into the knowledge, resources and skills that are out there.”

– Ivory Williams, Connecting our Seniors to Technology (COST) client

Leadership

BOARD OF DIRECTORS

Officers

Sarah M. Dimling, *Chair*

Belva Denmark Tibbs, *Vice Chair*

Constance Hill-Johnson, *Secretary*

Tiffinae Ware, *Treasurer*

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Sue Omori
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Corporate Compliance Officer*



FOR QUESTIONS, PLEASE CONTACT:
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