

A VISION FOR
aging well

2017 ANNUAL REPORT



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY



contact us

benrose.org • 216.791.8000 • info@benrose.org



BenRose1908



BenRose1908



Benjamin Rose
Institute on Aging



Benjamin Rose
Institute on Aging

UPCOMING 2018 EVENTS—SAVE THE DATE!

Oct. 3 Katz Policy Lecture

Nov. 8 110th Anniversary Event

Oct. 16 ESOP Luncheon & Awards

Dec. 6 Caregiving Conference

For more information visit benrose.org.

table of contents

- 3** Welcome Letter
- 4** Innovating Service Delivery
- 6** Expanding Research
- 8** Research & Education
- 10** Advocacy
- 11** Financials
- 13** 2017 Donors
- 20** Board of Directors & Senior Management
- 21** Strategic Plan



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.

dear friends,

**FOR THE BENJAMIN ROSE INSTITUTE ON AGING,
THE YEAR 2017 WAS ONE OF PARTNERSHIP – BUILDING NEW
CONNECTIONS AND STRENGTHENING EXISTING RELATIONSHIPS.**

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

Richard Browdie
President & CEO



Emily A. Drake

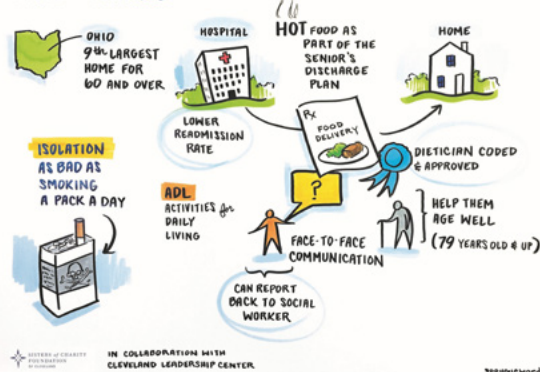
Emily Drake
Chairperson, Board of Directors

innovating service delivery

INNOVATIVE PROGRAMS FOR AGING WELL

MORE LOW-INCOME SENIORS WHO FACE FOOD INSECURITY, SOCIAL ISOLATION & FREQUENT HOSPITAL STAYS WOULD FIND THE SUPPORT THEY NEED

DABNEY CONWELL



Infographic describing Rose Center's Executive Director Dabney Conwell's project as an Innovation Mission fellow.



The Musical Theater Project visits the Ernest J. Bohn Rose Center for Aging Well.

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.

ALIGN SERVICES WITH CONSUMER PREFERENCES & EVIDENCE ON EFFECTIVE PRACTICES

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.



ESOP staff and volunteers provide free income tax preparation in Lakewood.

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.

GROWING & DEVELOPING EVIDENCE-BASED PROGRAMS

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.

research and education

SHARING EXPERTISE

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.

INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

ONLINE RESOURCE FOR EVIDENCE-BASED PROGRAMS FOR DEMENTIA CAREGIVING

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 and its subsidiaries were well again represented at the 2018 Aging in America conference.



Katie Maslow, MSW, co-chair for the National Research Summit on Care, Services and Support for Persons with Dementia and Their Caregivers delivers the keynote address at the annual caregiving conference at Benjamin Rose.

advocacy

INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

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.



Brothers Frank and Lou at the Lakeshore Rose Center for Aging Well participated in the #SaveLunch advocacy campaign.

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.



Benjamin Rose hosted a forum titled Addressing Aging Policy.

The latter program was co-hosted with partner and now-subsiary 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.

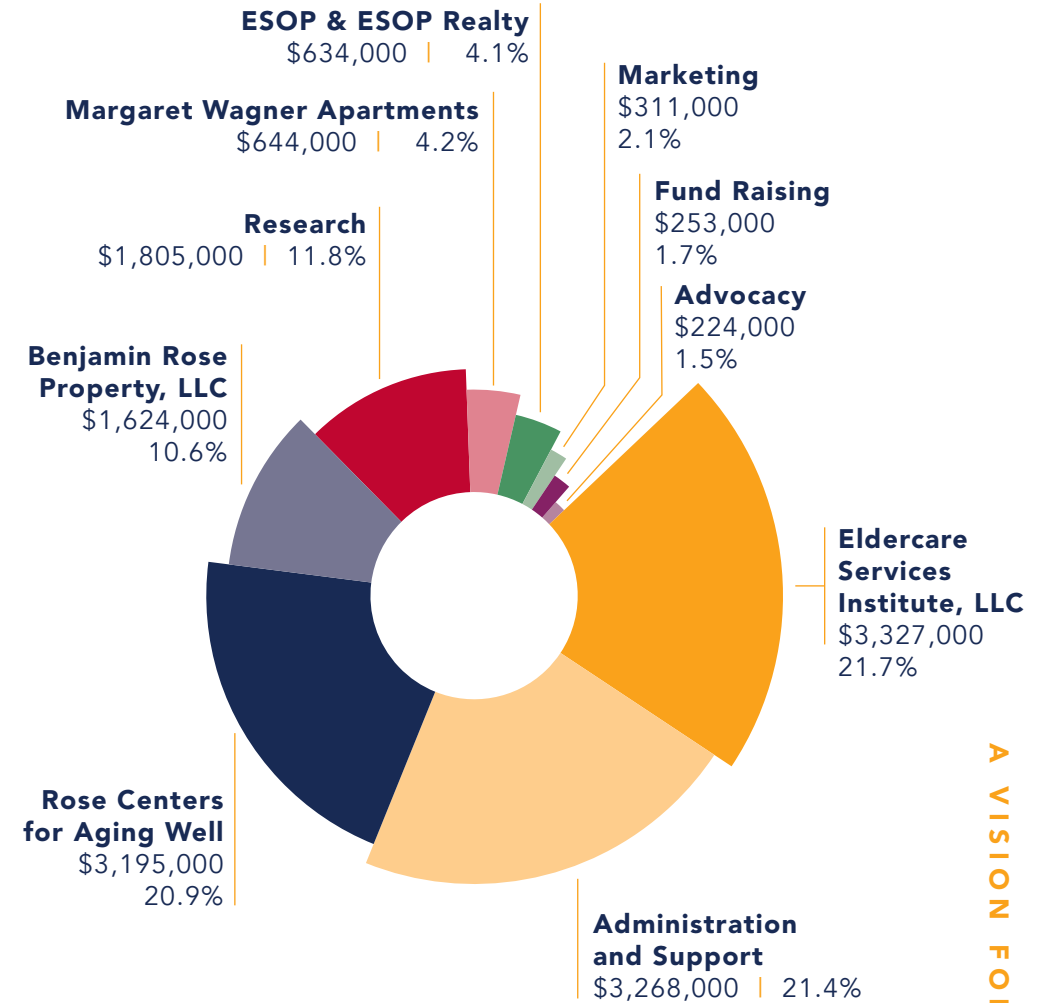
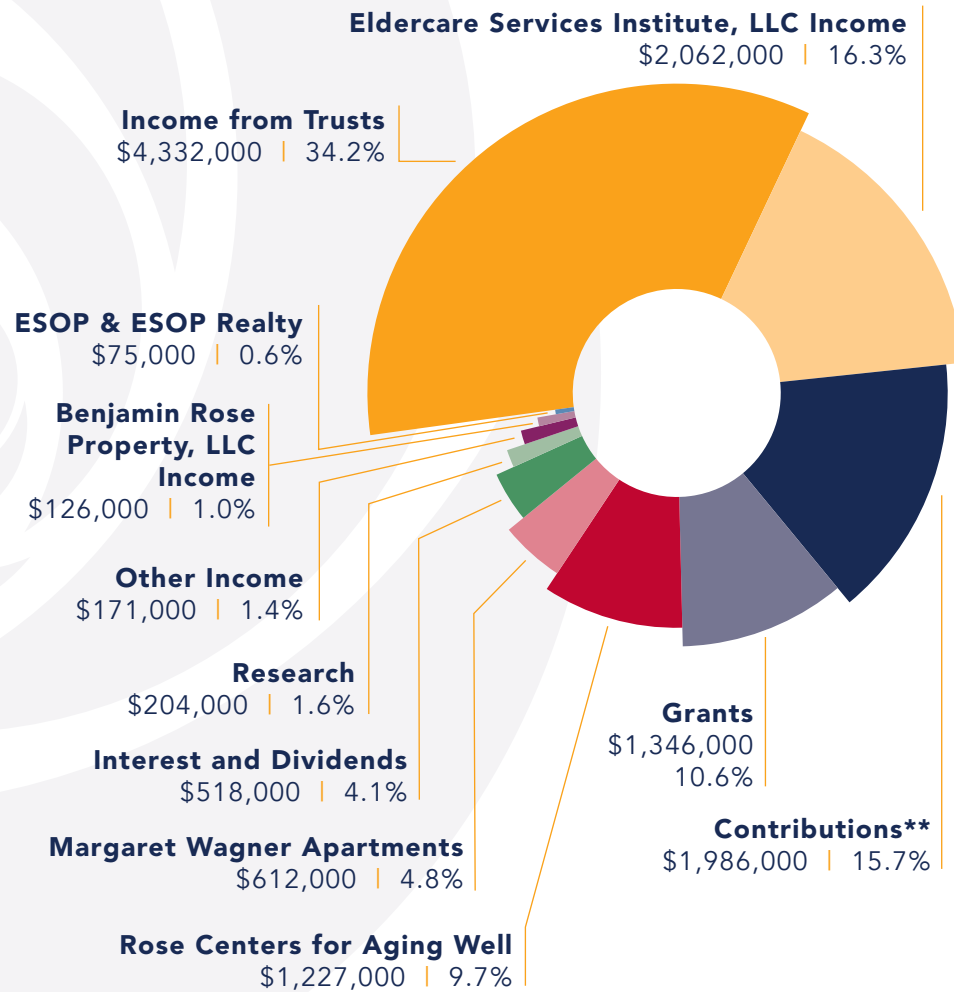
The expertise and leadership Benjamin Rose provides nationally in the area of aging policy was recognized when President and CEO **Richard Browdie was named a 2017 Influencer in Aging by Next Avenue**, public media's digital publication covering issues for people 50 and older. Each year, Next Avenue 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.

More information at nextavenue.org/influencers.

financials

SOURCES OF PROGRAM SUPPORT

\$12,659,000*



COSTS OF PROGRAM SERVICES

\$15,285,000

** Include in-kind gifts

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

financials

2017 FUNDING SOURCES

GRANTS

Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County

Archstone Foundation

Arizona State University

Case Western Reserve University

The Cleveland Foundation

Corporation for National and Community Service

Cuyahoga Arts & Culture

Cuyahoga County Division of Senior and Adult Services

The Edwin T. and Mary E. Hamilton Fund

Gerontological Society of America

The John A. Hartford Foundation

Lake County-Willoughby-Eastlake School District

Louis, Celia, & Joseph L. Abrams Memorial Fund of the Jewish Federation of Cleveland

Mount Sinai School of Medicine

National Council on Aging

The Norma Witt Jackson Fund

Ohio Department of Aging

The Ohio State University

Retirement Research Foundation

Sisters of Charity Foundation of Cleveland

University of Minnesota

U.S. Department of Health and Human Services:
Administration for
Community Living

U.S. Department of Veterans Affairs

WellMed Charitable Foundation

Western Reserve Area Agency on Aging

OTHER SOURCES

Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County

Apartment Tenant Fees

Benjamin Rose Trust Funds

Benjamin Rose Property LLC Leases

Buckeye Community Health Plan

CAHPS Survey Contracts

CareSource

Centers for Medicare and Medicaid Services

City of Cleveland

Client Fees

Ohio Department of Developmental Disabilities

Cuyahoga County Division of Senior and Adult Services:
Community Social
Services Program

Options for Elders

Evidence-Based Programs Contracts

Gifts and Donations

Great Lakes Realty

Greater Cleveland Food Bank

Healthways

LSC Services Corp.

McGregor PACE

Ohio Department of Medicaid

PASSPORT Medicaid Waiver

United Healthcare

New Market Tax Credits

Ohio Department of Aging

Ohio Department of Education

Older Americans Act, Title III

Research Evaluation Contracts

United Way

U.S. Department of Housing and Urban Development

U.S. Department of Veteran's Affairs

Village of Oakwood

2017 donors

CHAIRPERSON'S CIRCLE (\$100,000.00+)

United Way of Greater Cleveland

PRESIDENT'S CIRCLE (\$25,000.00+)

The Helen C. Cole Charitable Trust
Herbert F. Leisy, Jr. Trust

CHAMPIONS CIRCLE (\$10,000.00+)

Anonymous
The Hankins Foundation
KeyBank

ADVOCATES (\$5,000.00+)

Anonymous
Dr. & Mrs. James Goldfarb, MD
Mr. Robert L. Oldenburg
Sisters of Charity Foundation of Cleveland
Mr. & Mrs. Frederick Stueber

STEWARDS (\$2,500.00 +)

AARP Ohio State Office
Ms. Nancy A. Adams
Mr. & Mrs. Richard Browdie
Dr. Kathryn J. Bryan
Mr. & Mrs. Mark & Suzanne Carle
Cleveland Clinic
Ms. Emily A. Drake
Hyster-Yale Materials Handling
Mr. & Mrs. Jon H. Outcalt

Frances L. Snider Memorial Fund
Third Federal Savings & Loan Assn.
Western Reserve Area Agency on Aging

BENEFACTORS (\$1,000.00+)

American Foundation Corporation
Dr. E. Douglas Beach
William J. & Jean M. Bergold
Mr. Richard Bogomolny & Ms. Patricia M. Kozerefski
Mr. & Mrs. Glenn Brown
Calfee, Halter & Griswold LLP
Mr. & Mrs. Frank P. Cardinale
Mr. & Mrs. Andrew & Anne-Marie E. Connors
David & Inez Myers Foundation
Mrs. Sarah Dimling
Ms. Cynthia H. Dunn
Edward A. & Catherine L. Lozick Foundation
Mrs. Oliver F. Emerson
Ms. Deborah Enty
Ms. Kristen Lucas
Mr. & Mrs. Thomas C. Gilchrist
Dr. James E. Greene & Dr. Giesele R. Greene
Mrs. John A. Hadden, Jr.
Mr. & Mrs. Kevin Johnson
Mrs. Katherine B. Hollingsworth
J. Horst
HW & Company

Ideastream
Mrs. Yvette M. Ittu
Mr. & Mrs. Lee Janovitz
Judson Retirement Community
Mr. & Mrs. James K. Kaesberg
Dr. Alice J. Kethley
Ms. Christine Lobas
Mrs. Lori A. Lozier
Mr. & Mrs. Brian Marita
Mrs. Jennifer Markworth & Dale E. Markworth
Ms. Darleen McGeady
Mrs. Bea McPherson
Mr. & Mrs. A. Malachi Mixon, III
Mr. & Mrs. Charles J. Nock
Mr. & Mrs. Frank S. Novak
Mr. & Mrs. Dale Omeri
Mr. & Mrs. David Ostro
PNC Foundation Matching Gift Program
Ms. GERALYN Presti & Dr. John Sedor
Dr. & Mrs. Leone M. Püllella
Mr. Edward H. Richard
Mr. & Mrs. Dale M. Rothenberger, Jr.
The Samuel H. & Maria Miller Foundation
Mr. Harvey Shankman
Mr. Gregory P. Siek
Mr. Robert Underhill
Mr. & Mrs. Anthony Vegh
Mr. Jerrold Wareham
Ms. Marcia J. Wexberg, Esq.

PATRONS (\$500.00 +)

American Senior Magazine
Dr. David Bass & Dr. Katherine Judge
Mr. & Mrs. Michael Biedenbach
Mr. Robert Blancato
Drs. Christopher Brandt & Beth Sersig
Ms. Kate Brown
Buckeye Health Plan
Mr. & Mrs. James R. Carlson
Mr. & Mrs. William Conway
Ms. Dabney Conwell
Mr. & Mrs. Romney B. Cullers
Mr. G. Geoffrey Dampier
Mr. & Mrs. James A. Dayton
Mr. & Mrs. James N. Doan
Mrs. Diane Downing
Mr. & Mrs. Robert Draper
Dr. Susan Eagan
Eaton Corporation
Dr. Farida Ejaz
Eliza Bryant Village
Mr. & Mrs. Andrew L. Fabens, III
Mr. Bruce Fallick
Mr. & Mrs. Vincent Fiordalis, Sr.
Dr. & Mrs. Avrum I. Froimson
Mr. & Mrs. John E. Herman
Humana
Dr. Magnolia Jackson
Ms. Barbara B. Janovitz
Jewish Family Service Association of Cleveland

2017 donors

Mrs. Beverly Katz
 Medical Mutual of Ohio
 Montefiore & The Weils
 Ms. JoAnn H. Morano
 Ms. Myrtle I. Muntz
 Mr. Henry Ott-Hansen
 Mr. Henri Pell Junod Jr.
 Mrs. Ella Quintrell
 Mr. Norbert Rahl
 Dr. Jack Richard
 Ronald McDonald House
 of Cleveland, Inc.
 Mr. & Mrs. Frederick Tavill
 Mr. Nelson J. Wittenmyer, Jr.
 Mr. & Mrs. Christopher J. Zach

SPONSORS (\$250+)

Anonymous (2)
 Mr. Michael M. Billnitzer
 Mr. & Mrs. Charles P. Bolton
 Mr. Timothy Boyle
 Mr. & Mrs. Gary L. Brahler
 Mrs. Gwendolyn Byrd
 Mr. Robert Conrad
 Ms. Jennifer Corcoran
 Cuyahoga County
 Mr. & Mrs. James Dayton
 Mr. & Mrs. William M. Donley
 SUM - The Federal Reserve Bank
 of Cleveland
 Mr. Mark Fischer
 Mrs. Patricia R. Frutig

Mr. & Mrs. Peter Galvin
 Mr. George Gootee
 Mrs. Mary Groves
 Mr. & Mrs. David H. Gunning
 Mr. Christopher T. Hall &
 Ms. Michelle Hall
 Mr. & Mrs. Lawrence Hatch
 Mr. & Mrs. William C. Hatch
 Mr. & Mrs. Paul Hilton
 Ms. Jeanne M. Hoban
 Mrs. Jeanne Hoffmeyer
 The Kabb Law Firm
 Ms. Michelle Keller
 Mr. & Mrs. Gerrit C. Kuechle
 Mr. Sanford Kutash
 Ms. Diane M. Lance
 Dr. & Mrs. Roger Langston
 Ms. Norma Lerner
 Mr. & Mrs. Bruce Loessin
 Mr. George P. Loomis
 Ms. Valarie McCall
 Mr. & Mrs. Stanley A. Meisel
 Mr. Jacob Meyer
 Dr. Marjorie M. Moyer &
 Mr. Bert W. Moyer
 The Music Settlement
 Mr. & Mrs. Steven Newman
 Ms. Sarah A. Ott-Hansen
 Ms. Sarah E. Parker
 Dr. Brendan Patterson
 Ms. Roz Quarto
 Mr. & Mrs. Alan Roskamm

Mr. Neil T. Ruddock
 Ms. Rita Sachs
 The Sherwin-Williams Company
 Mr. & Mrs. John Silvis
 Mrs. Gretchen D. Smith
 Mr. Jeffrey Sunshine
 Visiting Angels Senior Homecare
 Mr. & Mrs. Jeff & Hallie Wasserman
 Dr. Carol Whitlatch

FRIENDS (\$.01+)

Ms. Janet Adamo
 Mr. & Mrs. Paul W. Alandt
 Mr. Stephen Alexander
 Ms. Nicole Alexander-Williams
 Mrs. Barbara C. Andrews
 Ms. Margot Baruch
 Ms. Cynthia Bassett
 Mrs. Aloise O. Bates
 Ms. Cynthia Bender
 Ms. Eva M. Benson
 Mr. & Mrs. Michael Benz
 Ms. Lynn C. Berg
 Mr. & Mrs. Thomas G. & Louise Brick
 Ms. Annie Brooks Todd
 Dr. & Mrs. William E. Bruner, II
 Mr. Brian Burkhard
 Ms. Lori-Ann Burlingame
 Ms. Patricia Camacho-Hughes
 Ms. Jennifer A. Cardellini
 Mrs. Linda Cardellini
 CareSource

Ms. Carleen K. Carver
 Mr. Michael A. Clegg
 Cleveland Sight Center
 Ms. Colleen Colbert
 Ms. Veronica K. Collins
 Ms. Colleen Connor
 Mr. & Mrs. William E. Conway
 Ms. Christy Cunningham
 Mr. & Mrs. David W. Davenport
 Mrs. Ann E. Deming
 Ms. Louise P. Dempsey
 Ms. Natalie Dennis
 Ms. Jane Donnell
 Ms. Gloria Donnelly
 Mr. Robert Eble
 ESOP
 Mr. William E. Fehrenbach
 Ms. Maribeth Filipic-Katt
 Mr. Dean Fisher
 Mr. & Mrs. Donald J. Fisher
 Mr. Thomas A. Foster
 Mr. & Mrs. Earl R. Franklin
 Mr. Luke Frazier
 Mr. & Mrs. Laurence &
 Jamie Friedman
 Mr. Jeffrey Galla
 Mr. Jorge Gatica
 Ms. Nancy L. Gerson
 Mrs. Nina Gibans
 Mr. & Mrs. Melvin Ginsberg
 Mr. & Mrs. Sheldon Gisser
 Major Brian Glasco

Ms. Marybeth Glasier
 Mr. Wardell Gooch &
 Ms. Yvonne C. Gooch
 Ms. Phyllis Gordon
 Ms. Linda R. Granowitz &
 Mr. Murray Cohen
 Mr. & Mrs. James H. Grant, Sr.
 Ms. Linda Greytak
 Mr. & Mrs. Robert & Sally Gries
 Ms. Deborah Gullian
 Ms. Letty L. Harris
 Ms. Linda Hatcher
 Mr. & Mrs. Brad Helfman
 Mr. Anthony W. Hiti, AIA
 Mrs. Linda Holt
 Ms. Jane Huml
 Mr. Frederick Jackson
 Ms. Kathryn Janoni
 Ms. Sandra Jeney
 Mr. Justin Johnson
 Ms. Nancy Johnson
 Ms. Natalie J. Johnson
 Mrs. Loretta Jones
 Ms. Helen J. Kalski
 Mrs. Charlotte Kaminsky
 Brother Daniel Q. Kane, CSC
 Ms. Ronna Kaplan
 Mr. Kurt Karakul
 Ms. Patricia M. Karr-Segal
 Ms. Betty J. Kemper
 Ms. Sandra Kiely Kolb
 Mr. Frederick Klein

Mr. & Mrs. Ronald D. Kohut
 Dr. Denise M. Kresevic
 Mr. & Mrs. Gerrit C. Kuechle
 Dr. & Mrs. Robert S. Kunkel
 Dr. Frederic W. Lafferty
 Ms. Linda Lagunzad
 Mrs. Jennifer B. Langston
 Ms. Gloria Levine
 Ms. Nicole B. Lewis
 Mary Lipovan
 Ms. Wendy J. Looman
 Mrs. Catherine D. LoPresti
 Ms. Lisa A. Lowe
 Mrs. Katherine Marsh &
 Mr. Vlad Vekstein
 Mr. Joel Marx
 Ms. Tracey N. Mason
 Ms. Marlene McClain
 Ms. Janice G. McKenzie
 Mr. Randall McShepard
 Mr. & Mrs. A. G. Merriman, Jr.
 Ms. Mary C. Michael
 Mr. Brandon Miller
 Mr. Robert Moll
 Mr. & Mrs. Carmine L. Montana
 Mr. & Mrs. Melville Moses, Jr.
 Mr. & Mrs. Milton Moss
 Ms. Karyn Mueller
 Mr. & Mrs. Alfred H. Oldenburg
 Olivet Institutional Baptist Church
 Mr. & Mrs. David M. O'Loughlin
 Ms. Grace B. Ordin

Ms. Bonnie Paul
 Ms. Victoria L. Pekar
 Mr. Patrick Peters
 Mr. & Mrs. S. Colin Petry
 Mr. Edward Piepmeier
 Councilman Michael D. Polensek
 Ms. Charlotte Powells
 Progressive Insurance
 Mr. & Mrs. Robert & Sylvia Reitman
 Mr. & Mrs. Erick & Erica Remer
 Ms. Almuth E. Riggs
 Mrs. Barbara Robinson
 Ms. Laurie Rokakis
 Mrs. Miriam Rose
 Ms. Amy Rosenfield
 Mr. Joseph Ruby
 Mr. Jeffrey Sabatine
 Mr. & Mrs. Gordon Safran
 Ms. Jennifer Salkin
 Dr. & Mrs. Warren Salkin
 Ms. Jo M. Salupo
 Ms. Constance Sandberg
 Mr. John Hooper &
 Ms. Rita E. Schraff Hooper
 Mr. & Mrs. John D. Schubert
 Mr. & Mrs. John B. Schulze
 Mr. & Mrs. Robert L. Schustak
 Mr. & Mrs. Dennis Schwartz
 Mr. Jason E. Sehlmeier
 Ms. Sonya Shultz
 Simply EZ Home Delivered Meals
 of NE Ohio LLC

Mr. & Mrs. Charles Smith
 Mr. Joseph Smith
 Ms. Marcella Smith
 Mr. & Mrs. Alan G. Smith
 Ms. Mary McCann
 Stephen J. Squeri & Theresa Squeri
 Mr. & Mrs. Robert Stein
 Dr. & Mrs. Richard Stroom
 Studiothink
 Ms. Kim Sullivan
 Ms. Esther R. Swertloff
 Ms. Danielle Sydnor
 Ms. Lisa Taylor
 Mr. & Mrs. Keith Teicher
 Ms. Maria Thompson
 Ms. Valerie Toth
 Mrs. Hermine Union
 United Way of Greater Atlanta
 University Center of Aging & Health
 Mr. Eric Urdzik
 Mr. George Weidinger
 Ms. Annabelle Weiss
 Mr. Robert D. Weitzner
 Ms. Agnes Werbin
 Ms. Ashlee Williman
 Ms. Melissa Winberry
 Ms. Karen Wittrock
 Ms. Catherine Yandle
 Mr. Anthony L. Zacchino
 Ms. Susan Paley Zak
 Ms. Charlene Zatik

2017 donors

TRIBUTE GIFTS

In Memory Of

Bernard Bauer

Ms. Phyllis Gordon

Donna Blume

Ms. Charlene Zatik

Elaine Brackenridge

Ms. Carleen K. Carver

Lois Bartholomew Conaway

Dr. Carol Whitlatch

Richard Corrado

Mr. and Mrs. Donald J. Fisher

Beatrice P. Daly

Mrs. Linda Cardellini

Mary Eble

Mr. Robert Eble

Mr & Mrs Billy Gullian

Ms. Deborah Gullian

Stephen Hogan

Mr. and Mrs. Frank P. Cardinale

Ryan Housholder

Mr. and Mrs. Frank P. Cardinale

William J. Judge

Mr. and Mrs. Frank P. Cardinale

Mr. & Mrs. Andrew &
Anne-Marie E. Connors
Mrs. Miriam Rose

Irvin Kalski

Ms. Helen J. Kalski

Elliott Kaminsky

Mrs. Charlotte Kaminsky

Jayson Kaminsky

Mrs. Charlotte Kaminsky

Dora A. Karr

Ms. Patricia M. Karr-Segal

Harry A. Karr

Ms. Patricia M. Karr-Segal

Hilda Kennerdell

Mr. G. Geoffrey Dampeer

Kathryn 'Bunny' Loomis

Mr. and Mrs. Frank P. Cardinale
Mr. and Mrs. Vincent Fiordalis, Sr.
Mr. and Mrs. David Ostro
Mr. George P. Loomis
Mr. and Mrs. Frederick Stueber

Catherine D. LoPresti

Mr. and Mrs. Frank P. Cardinale
Mr. and Mrs. Vincent Fiordalis, Sr.
Ms. Jeanne M. Hoban
Mrs. Gretchen D. Smith

Anne B. Ott-Hansen

Mr. Henry Ott-Hansen
Ms. Sarah A. Ott-Hansen

Samuel R. Petry

Mr. & Mrs. James N. Doan
Eaton Corporation
Mr. & Mrs. Earl R. Franklin
Mr. Frederick Klein
Mrs. Katherine Marsh and
Mr. Vlad Vekstein
Mr. & Mrs. David M. O'Loughlin
Mr. Edward Piepmeier
Dr. and Mrs. Leone M. Pullella
Mrs. Hermine Union

Doris A. Matthey

Mr. Norbert Rahl

Michael McCarthy

Mrs. Miriam Rose

Barbara S. Oldenburg

Mrs. Barbara C. Andrews
Mr. and Mrs. Alfred H. Oldenburg

Mark J. Pienkowski

Ms. Janice G. McKenzie

Henry and Ida Richard

Mr. Edward H. Richard
Dr. Jack Richard

Alma and Dale Rothenberger

Mr. and Mrs. Dale M. Rothenberger, Jr.

Evelyn G. Schaber

Mr. Stephen Alexander

Edward Sears

Mr. and Mrs. Frank P. Cardinale

Harriet Sherrod

Ms. Catherine Yandle

Edward Stein

Ms. Helen J. Kalski

Sol Stein

Ms. Helen J. Kalski

In Honor Of**Eva Avery**

Ms. Marcella Smith

David M. Bass, PhD

Ms. Wendy J. Looman

Benjamin Rose Institute Center for Research and Education

Dr. David Bass and Dr. Katherine Judge

Semanthie Brooks

Ms. Jeanne M. Hoban

Lee M. Fisher

Anonymous

Almuth E. Riggs

Mr. and Mrs. Robert L. Schustak

Mr. and Mrs. Frederick Tavill

Robert D. Weitzner

James Goldfarb

Mr. Nelson J. Wittenmyer, Jr.

Jeanne Hoffmeyer

Ms. Jennifer A. Cardellini

Ms. Cynthia H. Dunn

Dr. & Mrs. Avrum I. Froimson

Mrs. Jennifer B. Langston

Mr. Robert Oldenburg

Ms. Rita Sachs

Barbara B. Janovitz

Mr. Joel Marx

Kathryn L. Kaesberg

Ms. Amy Rosenfield

Mr. and Mrs. Frederick Stueber

Mary S. Marita

Mr. and Mrs. James H. Grant, Sr.

Robert L. Oldenburg

Anonymous

Mr. and Mrs. Gerrit C. Kuechle

Geralyn Presti

Drs. Christopher Brandt and Beth Sersig

Ms. Patricia Camacho-Hughes

The Music Settlement

Roz Quarto

Mr. Patrick Peters

Norbert Rahl

Ms. Wendy J. Looman

Mr. and Mrs. Alan G. Smith

Harvey Shankman

Jamie and Laurence Friedman

Elizabeth F. Stueber

Ms. Sandra Kiely Kolb

Mr. and Mrs. Gerrit C. Kuechle

Ronald Taschner

Ms. Marlene McClain

Carol Wimberly

Mr. Justin Johnson

2017 donors

THE LEGACY SOCIETY

Members of the 1908 Legacy Society have included the Benjamin Rose Institute on Aging 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 the Benjamin Rose Institute on Aging in your estate plans but do not see your name listed, **please contact Anne-Marie E. Connors at 216.373.1608 or aconnors@benrose.org**. We would like to honor your commitment and dedication to Benjamin Rose.

Margaret F. Barnes Trust

Mrs. Aloise O. Bates

Ms. Polly Clemo and Mr. Chuck Baird

Phyllis J. Colarusso*

Mrs. Lois H. Cole

Ms. Helen C. Cole*

Mr. and Mrs. William Conway

Dr. Adam B. Denison*

Miss Barbara Denison*

Mr. Dale Dettmer*

Mrs. Dorothy Dettmer*

Ms. Emily A. Drake

Mrs. Oliver F. Emerson

Oliver F. Emerson*

Mr. and Mrs. Vincent Fiordalis, Sr.

Mr. and Mrs. Peter Galvin

Mrs. Catherine R. Gerbic

Mr. and Mrs. Thomas J. Gruber

Mr. and Mrs. David H. Gunning

Mr. and Mrs. James K. Kaesberg

Alice J. Kethley, Ph. D.

Mr. Herbert F. Leisy Jr.*

Mr. Raymond Lusin

Ms. Darleen McGeady

Mrs. Margaret M. McGuire*

Dr. Linda Noelker and Mr. Raymond Jason

Mr. Robert L. Oldenburg and

Mrs Barbara Oldenburg*

Mr. Henry Ott-Hansen

Ms. Sarah A. Ott-Hansen

Mr. Edward H. Richard

Eleanor Delores Santos Estate

Mr. Robert V. Schenk and

Ms. Linda A. Richard

Mrs. Elizabeth Hitchcock Rose*

Mr. and Mrs. Dale M. Rothenberger, Jr.

Mrs. Faye M. Shapero*

Mr. and Mrs. Jackson G. Simpson

Ms. Marcia J. Wexberg, Esq.

Mrs. Dorothy M. Young*

IN-KIND GIFTS

5P Marketing	District	Janice Guhl Hammer	Sprinly
Accents Salon & Spa	ESPN Radio	John Robert's Salon & Spa	Studio Taylor
Ms. Nancy A. Adams	Food for Thought	The Loving Hands Group	Studiothink
The Adcom Group	Mr. Gary Brahler	The Lu Jean Feng Clinic	Ms. Susan Stewart
Alson Jewelers	Mr. George T. Weidinger	Marigold Catering	Tekogi
Mr. Anthony L. Zacchino	The Glass Asylum	Mulholland & Sachs	TownHall Restaurant
Aspire Fitness	GO2 Advertising	NCM Theater	Vitamix
Beau Coiffure Salon & Spa Boutique	Great Lakes Publishing	Organizing 4 U	WFHM 95.5 FM
CBS Radio	GV Artwork	Phuel Cafe	WJW-TV (Fox 8)
The City Club of Cleveland	Hands on Relaxation Massage & Therapy	Playhouse Square Foundation	WKYC
Cleveland Clinic Wellness Institute	Hot Cards	Pre-ferd Maid Service	WNWV-FM
Cleveland Jewish News	Hulu	Quintana's Barber & Dream Spa	
Cleveland Orchestra	iHeart Media	Radius	
The Color Loft	InterContinental Hotel	Rock & Roll Hall of Fame	
Mr. and Mrs. Andrew and Anne-Marie Connors	J. Pistone's	Senior Transportation Connection	

MATCHING GIFTS

Eaton Corporation	Hyster-Yale Materials Handling	PNC Foundation Matching Gift Program	Progressive Insurance
-------------------	--------------------------------	---	-----------------------

We have made every effort to ensure the accuracy of the information presented about donations to Benjamin Rose Institute on Aging or its affiliates in this publication. If you have any corrections, please call the Institutional Advancement Office at 216.373.1611.

benjamin rose institute on aging

SENIOR MANAGEMENT

Richard Browdie, MBA

President & CEO

David M. Bass, PhD

Senior Vice President, Research and Education

Frank P. Cardinale, MBA, CPA

CFO & Senior Vice President, Finance and Support Services

Mary S. Marita, MHSA, LNHA

Senior Vice President & COO

Geneva Anderson, MLRHR

Vice President, Human Resources
Corporate Compliance Officer

Michael Billnitzer, SHRM-SCP

Associate Director, ESOP
Associate Vice President, Organizational Development,
Benjamin Rose Institute on Aging

Anne-Marie E. Connors, MAEd

Vice President, Institutional Advancement

Dabney Conwell, MSSA, LSW

Executive Director, Rose Centers for Aging Well
Vice President, Benjamin Rose Institute on Aging

Susan L. Eagan, PhD

Vice President, Strategic Development

Roslyn A. Quarto, Esq.

Executive Director, ESOP
Vice President of Advocacy, Benjamin Rose
Institute on Aging

2017 BOARD OF DIRECTORS

Officers:

Emily Drake, Chair

Cynthia H. Dunn, Vice Chair

Hermine Krasny, CPA, Treasurer

Marcia J. Wexberg, JD, Secretary

Elizabeth F. Stueber, Past Chair

Members:

Nancy A. Adams

Barbara Bellin Janovitz

Kathryn R. Bryan, PhD

Suzanne Carle

Sarah Dimling

Deborah C. Enty

Patricia R. Frutig, JD

Amy Gilchrist, JD

Giesele Robinson Greene, MD

Connie Hill-Johnson

Yvette Ittu

Maggie Jackson, PhD

Kathryn Kaesberg

Denise Kresevic, PhD

Christine Lobas

Lori Lozier

JoAnn Morano

Sue Omori

benjamin rose institute on aging

STRATEGIC PLAN 2016-2020

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.

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.



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY

CELEBRATING 110 YEARS

11890 Fairhill Road
Cleveland, Ohio 44120

Nonprofit Org
US Postage
Paid
Cleveland, OH
Permit No 3601

