



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY

CELEBRATING 110 YEARS

connect • collaborate • cultivate • celebrate



UPCOMING EVENTS

Sept. 4 KATZ POLICY LECTURE

Oct. 22 ESOP LUNCHEON & AWARDS

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ABOUT THIS BOOK

This is the 2018 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 Marisa Caliguire, Institutional Advancement Coordinator. Design: Studiothink.

Dear friends,

IN SEPTEMBER 2018, WE CELEBRATED THE 110TH ANNIVERSARY OF THE INCORPORATION OF THE BENJAMIN ROSE INSTITUTE, NOW KNOWN AS BENJAMIN ROSE INSTITUTE ON AGING.

Throughout our history, Benjamin Rose has been a leader in the field of aging, developing new methods of providing care, responding to current and anticipated needs of aging cohorts, and developing innovative solutions to the challenges faced by older adults and caregivers.

Over the past few years, that innovative spirit has been guided by our 2016-2020 Strategic Plan, which you will find in the back of this book.

We are proud of the progress that we have made over the past year toward our strategic goals. We increased the dissemination of knowledge and information to older adults, caregivers, professionals and policymakers through high-quality in-person educational programs and online content with partners like *Guideposts*. We have continued to expand our research on caregiving, service access, impact of services, and wellness, and have begun to pursue new research topics and product development. We continue to find new ways to market our evidence-based programs, BRI Care Consultation™ and SHARE for Dementia, which are now offered by licensed organizations across the country.

"SHARE for Dementia" and "BRI Care Consultation" are service marks of the Benjamin Rose Institute on Aging

BRI Care Consultation™ has also been added to the menu of services provided by our own Eldercare Services Institute, providing assistance and coaching to families via telephone to help them manage care of a loved one with chronic conditions. Our mental health case management, counseling and group therapy have been successfully realigned as Behavioral Health Services, ensuring that older adults with mental illness receive the help they need.

We are well on our way to realizing our vision to be at the forefront of developing and delivering strategies that promote health and wellness for older adults and caregivers.

We are grateful to the funders, donors and friends who support our work and enable us to fulfill our mission to advance support for older adults and caregivers.

We hope you will continue to Connect, Collaborate and Cultivate with us.

Sincerely,



Mary S. Marita

Mary S. Marita, MHS, LNHA
2018 Interim CEO, Senior Vice President & COO



Emily A. Drake

Emily A. Drake
2018 Chairperson, Board of Directors



SUSTAINABLE PARTNERSHIPS

STRONG PARTNERSHIPS ARE KEY TO THE CONTINUED GROWTH OF BENJAMIN ROSE INSTITUTE ON AGING.

Throughout 2018, existing relationships were strengthened and new partnerships explored.

This theme was even celebrated with our 110th anniversary year charge: *Connect, Collaborate, Cultivate, Celebrate.*

PARTNERSHIPS ENHANCE OPPORTUNITIES

The Rose Centers for Aging Well, a subsidiary of Benjamin Rose, continually explores creative ways to bolster funding for programs and meals. Partnerships play a huge role in providing new opportunities and in achieving the mission of promoting successful aging for Northeast Ohio's adults by offering opportunities, programs and services that foster choice and independence. Among the numerous partnerships undertaken during the year, Valley Foods became the meal provider for our seven senior center locations and home-delivered meal program through a catering contract with Western Reserve Area Agency on Aging and as a Benjamin Rose vendor. The company updated our kitchen at Margaret Wagner House, where more than 850 meals per day are now prepared.

When the Rose Centers lost a source of funding for transportation, our partners at Anthem Blue Cross and Blue Shield stepped up and provided funds that enable our participants to continue offsite recreational outings that enhance their lives. Anthem also supports selected activities during the year, providing informational and recreational programs in the centers.



Thanks to our partnerships with Senior Transportation Connection and Anthem, Rose Centers participants can enjoy outings around northeast Ohio.



Rose Center participants received free dental check-ups thanks to a partnership with Case Western Reserve University's School of Dental Medicine.



SUSTAINABLE PARTNERSHIPS

RECOGNIZING PARTNERSHIPS

The concept of partnership is so vital to Rose Centers that the annual fundraiser in support of Rose Centers programs was renamed “Partnerships and Progress” in June 2018. The program included the inaugural Partnerships and Progress Award, which was presented to The Musical Theater Project (TMTP), a local nonprofit organization that fosters a deeper understanding and appreciation of the American musical through programs that educate as well as entertain people of all ages. The Partnerships and Progress Award recognizes community organizations who have partnered with the Rose Centers for Aging Well and have made a direct impact in the lives of Rose Centers participants.

During the event, guests participated in a fun, interactive, musical theater experience presented by TMTP, which frequently presents programs in Rose Centers’ seven senior center locations. Event guests were also the premiere audience for a video spotlighting the Rose Centers, generously created by Dale Omori, Omori Media LLC with Al Fuchs Photography ([find it at rosecenters.org](http://findit.at.rosecenters.org)).

Thank you to the sponsors who helped make the 2018 event a success:

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Valley Foods



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SUSTAINABLE PARTNERSHIPS

FINANCIAL EMPOWERMENT FOR OLDER ADULTS

Long-time partner Empowering and Strengthening Ohio's People (ESOP) joined Benjamin Rose as a subsidiary in 2017, and by its 25th anniversary year in 2018, ESOP was fully integrated into the organization. With a new logo coordinated with the Benjamin Rose brand and a new mission to help adults in all stages of life achieve and maintain financial wellness and housing stability, ESOP brought existing partnerships to Benjamin Rose and forged new relationships in the aging community.

This was especially evident in the Senior Financial Empowerment Initiative (SFEI), a series of workshops, one-on-one counseling and other assistance which helps older adults make good financial decisions and maintain financial stability, empowering them to age in place with a more secure financial future.

PARTNERSHIP FOR FINANCIAL WELLNESS

Over the past few years, ESOP has built a partnership with The MetroHealth System to provide employees with access to a sound financial education program and one-on-one financial coaching as part of the employee wellness program, the MetroHealthy Wellness Initiative. The program is intended to help alleviate stress that can be caused by financial concerns and help staff who participate in the program attain financial wellness.

Last year, ESOP conducted a series of 10 monthly financial "Lunch and Learn" workshops at the MetroHealth main campus. More than 230 employees participated. The program continues in 2019 at the Old Brooklyn Campus.

The Lunch and Learn sessions and individual coaching conducted by ESOP have helped MetroHealth employees learn how to budget, establish savings, repair credit, reduce debt and navigate banking resources. Participants in 2018 realized an average increase in savings of \$670.

The Rose Centers for Aging Well, the National Caucus and Center on Black Aging, Inc., Cleveland Department of Aging and Senior Community Service Employment Program (SCSEP) are a few of the organizations ESOP partnered with during the year to expand the impact of the SFEI workshops in order to reach more older adults across northeast Ohio.

By the end of the year, an additional 4,989 older adults had learned how to recognize financial exploitation and scams, prepare for the future, set goals and budget, take control of credit and debt, build savings and understand financial products, complete an action plan, and gained knowledge of programs and supports.



Older adults from Fairhill Partners display their completion certificates following participation in the Senior Financial Empowerment Initiative.



INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

Benjamin Rose Institute on Aging and our subsidiaries are committed to the strategic goal of sharing knowledge and information with consumers, professionals and policymakers in an effort to improve services and supports for older adults and caregivers.

INFORMATION FOR OLDER PEOPLE

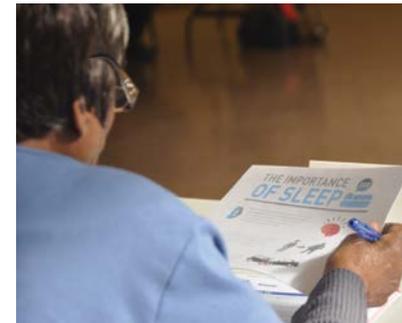
Since 2015, the Rose Centers for Aging Well has provided the Aging Mastery Program® (AMP) in our centers and, in partnership with the City of Cleveland Department on Aging, in other locations throughout the city. AMP, a 10-week program developed by the National Council on Aging (NCOA/ ncoa.org), encourages adults to make and maintain small but impactful changes in health behaviors, financial well-being and enrichment in later life.

Research from NCOA has shown that program participants have increased their physical activity levels, healthy eating habits, use of advanced planning, social connectedness, and participation in evidence-based, self-management programs. In 2018, Rose Centers received a two-year licensure from NCOA to provide AMP to older adults throughout Ohio. This will allow hundreds of additional older adults across the state to benefit from this effective program.

INFORMATION FOR CAREGIVERS

During 2018, a Consumer Information Initiative was launched with the hiring of Jennifer Cardellini as director and the development of partnerships with highly regarded distribution outlets. Content experts from Benjamin Rose began providing monthly articles for an online caregiving section of Guideposts, which reaches more than 600,000 readers. Consumer-friendly articles are produced on a range of topics, including holiday stress, preparing for care in the event of a disaster, preventing malnutrition, music therapy, action plans for dementia care, finding resources in your community, and more ([find these articles and others at benrose.org](http://benrose.org)).

Helpful information for caregivers was also shared through IMPACT Solutions, thanks to a new partnership with the employee assistance program. Employees of IMPACT clients now have access to expert tips on managing the challenges of caregiving while working outside the home.



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INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

INFORMATION FOR PROFESSIONALS

Benjamin Rose Institute on Aging has developed a reputation for convening outstanding educational opportunities with national speakers. The year 2018 was no exception.

In October, the 12th annual **Katz Policy Lecture** was delivered by Lance Robertson, Assistant Secretary for Aging, and Administrator, Administration for Community Living, U.S. Department of Health and Human Services. Robertson discussed food insecurity and social isolation among vulnerable adults. During his talk, he outlined programs and policies at ACL that are focused on connecting people to services and expanding the reach of the aging network.



Katz Policy Lecturer Lance Robertson with then-President and CEO Richard Browdie.

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The **annual caregiving conference**, held December 6, 2018, explored dementia-inclusive communities: what they are, why they are important and how they benefit both individuals with dementia and their family or friend caregivers.

Keynote speaker Meredith Hanley, Director, Community Capacity Building, National Association of Area Agencies on Aging, shared information on innovative community responses to dementia care. The conference also featured keynote speaker Kristen Felten, Dementia Specialist with the State of Wisconsin Department of Health Services Office on Aging, who discussed dementia-friendly communities in Wisconsin, and how the "Toolkit for Building Dementia-Friendly Communities," which she co-authored, can serve as a guide for implementing and sustaining dementia-inclusive communities in other states.

The conference also featured a panel that spearheaded local discussion of collaborative efforts to make communities in Ohio dementia-inclusive through the development of new programs, training, research and collaborative networks.



Senior Vice President David Bass, PhD, with conference keynote speaker Meredith Hanley.



INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

TRAINING THE TRAINERS

Throughout the year, **Empowering and Strengthening Ohio's People (ESOP)**, with support from **JPMorgan Chase & Co.**, provided train-the-trainer programs across the country on Older Adult Financial Capability. The programs helped other nonprofits learn how to expand programming to address the financial challenges facing older adults who want to age in place with greater financial stability.

Since launching the program in 2016, ESOP has trained over 350 agencies in 16 cities across the United States, including Wilmington, DE, Detroit, MI, Philadelphia, PA, Milwaukee, WI, and Indianapolis, IN in 2018.



Train the Trainer program in Phoenix, AZ.

EXPANDING RESEARCH

EXPLORING NEW LINES OF RESEARCH

The Center for Research and Education at Benjamin Rose is well-known for excellence in research on caregiving, access to and impact of services, and elder abuse. In 2018, looking to pursue new research topics and product development, the Center hired two research scientists who expand the scope of current research programs.



Jessica Bibbo, PhD, has investigated human-animal interaction and elder abuse training, as well as the impact of home-delivered meals on the successful transition from hospital to home.

Her expertise enhances current research programs involving the identification and reporting of elder abuse and gives a boost to the development of a project exploring the use of medically tailored home-delivered meals following hospitalization.



Sara Powers, PhD, has focused her research on unmet needs of caregivers in diverse communities and financial well-being. She continues her work in these areas and is also the lead researcher in expanding program

evaluation activities, and exploring potential areas of collaborative research with *Guideposts* magazine as part of Benjamin Rose's partnership with *Guideposts*.



EXPANDING RESEARCH

DEVELOPING NEW PROGRAMS

A special task force in Lake County was charged with finding innovative ways to address isolation among older adults with dementia. They turned to Benjamin Rose for assistance, which led to the development of Making Connections Through Music. The program, which completed initial testing and implementation in Lake County in 2018, is a group music intervention for individuals with dementia.

Music-based interventions, music therapy and music listening are widely accepted as beneficial for increasing engagement and supporting the well-being of individuals with dementia. By the same token, research shows the benefits of being in a group setting for people with dementia. Making Connections Through Music married these two ideas in a program led by retired older adult volunteers in a community setting.



Older adults with dementia and their caregivers participated in six group music sessions led by the volunteers. In addition to the benefits to older adults with dementia, caregivers who participated learned how to use music as a tool to increase communication with their loved one and received new information each session on how to engage in meaningful activities at home.

The program in Lake County was funded through the Lake County Senior Levy Contingency Fund. Additional funding from the Ohio Department of Aging enabled the expansion of the program in Cuyahoga and Geauga counties. Through this effort, groups were successfully implemented in several sites that included the Adult Day Program at Benjamin Rose as well as Gunning Park Rose Center.

Future funding opportunities to continue to refine and test Making Connections Through Music will continue to be explored in 2019.



Lake County older adults and caregivers participated in a new program developed at Benjamin Rose: Making Connections Through Music.



EXPANDING RESEARCH

NEW FUNDING FOR EVIDENCE-BASED PROGRAMS

Two evidence-based programs from Benjamin Rose — **SHARE for Dementia** and **BRI Care Consultation™** — have been approved for future funding through Title III-D of the Older Americans Act, giving low-income older adults access to services they otherwise might not be able to afford. Inclusion on this list means funding for the programs will be available to more organizations helping families across the country.



SHARE (Support, Health, Activities, Resources, and Education) for Dementia is an evidence-based care-planning program for care partners: that is, individuals living with early-stage dementia and their family caregivers. Care partners work with a SHARE Counselor to identify sources of support, such as family, friends and service providers, in order to build a more balanced and realistic plan of care for the future.

Currently, Benjamin Rose has licensed eight organizations in several states to deliver SHARE. One notable example is the state of Wyoming where the number of licensed SHARE Counselors continues to grow in response to the needs of families dealing with dementia in rural communities.

“SHARE for Dementia” and “BRI Care Consultation” [and design] is a service marks of the Benjamin Rose Institute on Aging.



BRI Care Consultation™, an evidence-based care-coaching program for adults with chronic health conditions/disabilities as well as their family or friend caregivers, is now delivered in 44 licensed sites across the United States. It is delivered via telephone, mail and email by trained Care Consultants who coach individuals on managing their conditions and creating action plans, as well as providing ongoing support.

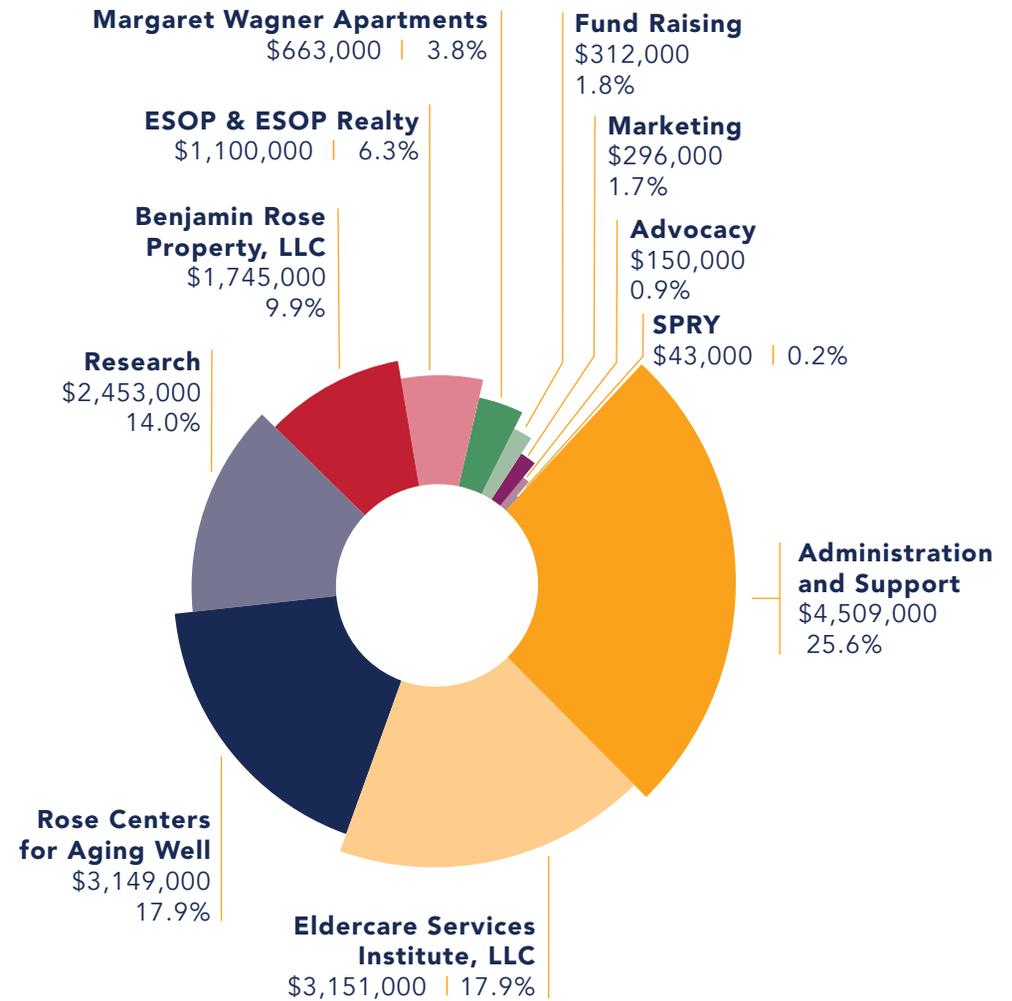
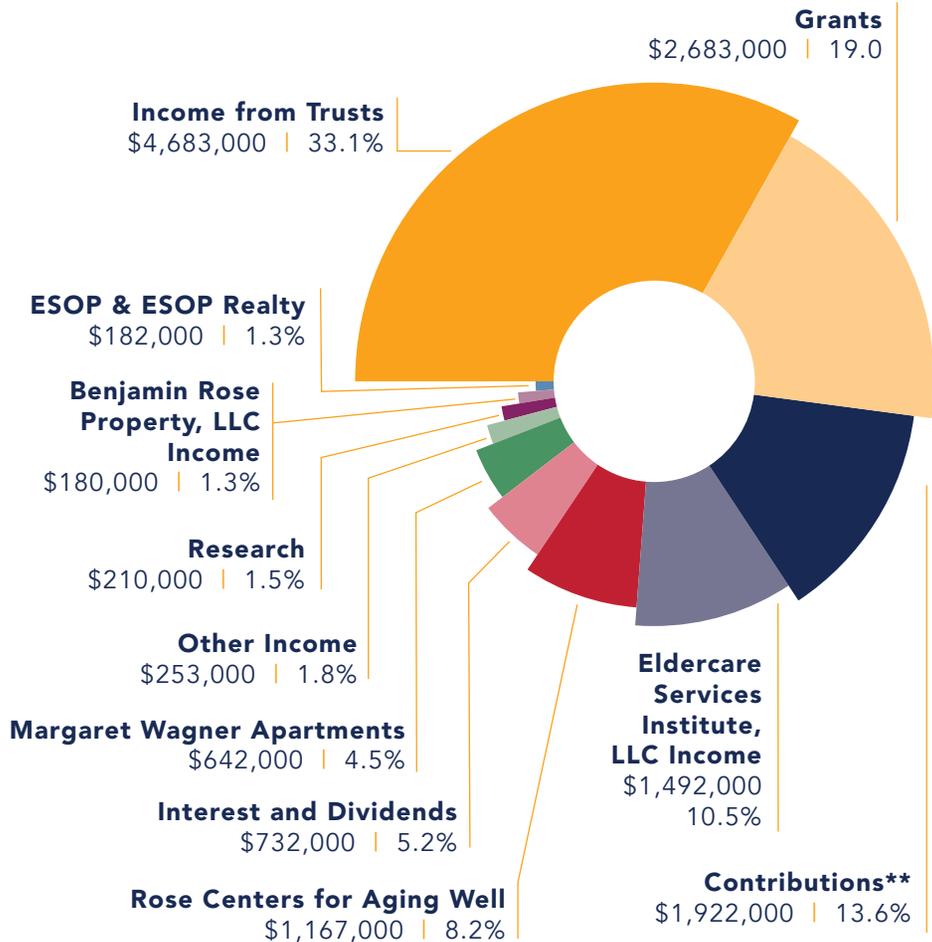
DELIVERING EVIDENCE-BASED PROGRAMS

During 2018, Benjamin Rose began to offer **BRI Care Consultation™** through the Eldercare Services Institute, to organizations on a contract basis or to individuals on a fee-for-service basis. Additionally, Benjamin Rose recently partnered with the **IMPACT Solutions** EAP program to provide the service to its clients. Enrolled employees of IMPACT clients have access to three consecutive months of BRI Care Consultation™ after which time employees can continue on a self-pay basis. The partnership with IMPACT provides a model for future expansion of BRI Care Consultation™. Benjamin Rose continues to explore partnerships with other EAP programs, insurance companies, health systems and others to expand the delivery of BRI Care Consultation™ using this model.

2018 FINANCIALS

SOURCES OF PROGRAM SUPPORT

\$14,146,000*



COSTS OF PROGRAM SERVICES

\$17,571,000

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

** Includes in-kind gifts.

FINANCIALS



2018 FUNDING SOURCES

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Mental Health Services Board of
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FINANCIALS

2018 FUNDING SOURCES

OTHER SOURCES

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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
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LSC Services Corp.

McGregor PACE

New Market Tax Credits

Ohio Department of Aging

Ohio Department of Education

Ohio Department of Medicaid

Older Americans Act, Title III

PASSPORT Medicaid Waiver

Research Evaluation Contracts

UnitedHealthcare

United Way

U.S. Department of Housing
& Urban Development

U.S. Department of Veteran's Affairs

Valley Foods

Village of Oakwood



Staff of JP Morgan Chase shared their skills with ESOP through the Force for Good program.



Randy Frost, PhD, of Smith College, was keynote speaker at the annual conference of the Hoarding Connection of Cuyahoga County, thanks to funding from the ADAMHS Board and support from Benjamin Rose.



Senior Research Scientist Farida Ejaz, PhD, (third from right) and colleagues from Texas APS and WellMed Foundation received the 2018 NAPSA Collaboration Award from the National Adult Protective Services Association.



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Lago sponsored a Brunch for a Cause with our Young Professionals group to benefit the Rose Centers for Aging Well.



Omori Media LLC (with Al Fuchs Photography) produced a video spotlighting the programs of the Rose Centers. View on our YouTube channel.

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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.

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