



**BENJAMIN ROSE**  
**INSTITUTE ON AGING**  
SERVICE • RESEARCH • ADVOCACY

**2020 ANNUAL REPORT**



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## ABOUT THIS BOOK

**This is the 2020 Annual Report of the Benjamin Rose Institute on Aging and its subsidiaries:**

- Benjamin Rose Property, LLC
- Branches Real Estate
- Eldercare Services Institute, LLC
- ESOP (Empowering and Strengthening Ohio's People)
- Margaret Wagner Apartments I & II
- Rose Centers for Aging Well, LLC

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-  Benjamin Rose Institute on Aging
-  Benjamin Rose Institute on Aging

As we look back on 2020, the word that seems to best describe the year is "pivot." A pivot is something that turns, hinges, with the ability to adjust while staying anchored. To pivot is to change direction, to adapt, to improve. The pandemic required Benjamin Rose Institute on Aging to reconsider our programs and services and how to best meet the needs of older adults and their families. We had to challenge assumptions about the way we do business and find new ways to deliver on our mission to support caregivers and empower all people to age well through research, consumer-responsive services and client advocacy.

One definition of pivot comes from sports. A basketball player holding the ball is able to turn on one foot, the pivot, to scan the court, find an open teammate, or initiate a play. The center on the team, usually the tallest player, is sometimes referred to as the "pivot", and many set plays in basketball involve a pass to the center, the pivot, who can then pass, shoot or drive to the basket. Regardless of the play, the goal is the same. In 2020, our service models may have changed, the staff and volunteers may have deployed differently, we found new partners in service and new ways to work with existing community partners, but our goal, our mission, remained the same.

In a period of dramatic change, when creativity, flexibility and patience were required, Benjamin Rose and its subsidiaries served more people and touched more lives. It was a remarkable year and one that called on all of us to rethink what we do, and how we do it. It is a story not only about our board, staff, and volunteers, but also the many individuals and organizations that helped make the work possible. Thank you for being part of that story.



*Cynthia H. Dunn*

Cynthia H. Dunn  
Chairperson



*Orion H. Bell IV*

Orion H. Bell IV  
President & CEO



# funding

## 2020 FUNDING SOURCES

### Grants

Administration for Community Living  
 Anthem Foundation  
 ARELLO Foundation  
 Arthur N. Rupe Foundation  
 Bank of America Foundation  
 CareSource Foundation  
 Cleveland Foundation  
 Cuyahoga Arts and Culture  
 The John A. Hartford Foundation  
 Health Resources and Services Administration  
 Human Animal Bond Research Institute

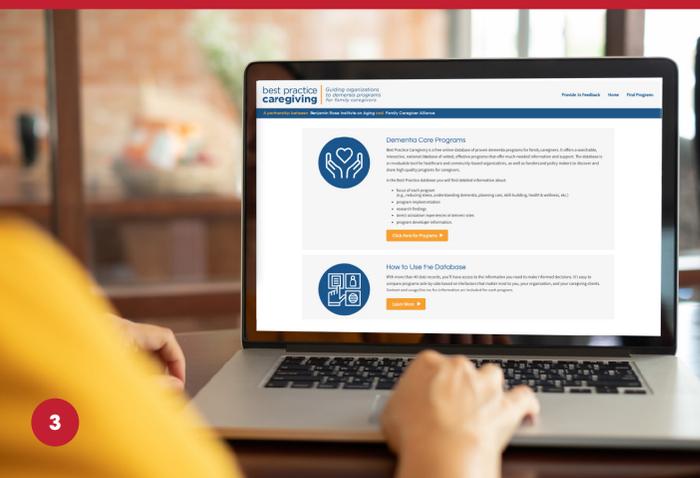
JPMorgan Chase Foundation  
 Meals on Wheels America  
 David and Inez Myers Foundation  
 National Association of Nutrition and Aging Services Program (NANASP)  
 National Institute on Aging  
 Ohio Department of Aging  
 Ohio Department of Mental Health and Addiction Services  
 Patient-Centered Outcomes Research Institute  
 PNC Foundation  
 RRF Foundation for Aging

The Hankins Foundation  
 The Samuel H and Maria Miller Foundation  
 Third Federal Foundation  
 U.S. Bank Foundation  
 Union Home Foundation  
 United Way of Greater Cleveland  
 Wells Fargo Foundation  
 Westfield Insurance Foundation  
 Woodruff Foundation

### Other Sources

Apartment Tenant Fees  
 Benjamin Rose Property LLC Leases  
 Benjamin Rose Trust Funds  
 Buckeye Health Plan  
 CAHPS Survey Contracts  
 CareSource  
 Centers for Medicare and Medicaid Services  
 City of Cleveland  
 City of Shaker Heights  
 Client Fees

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](mailto:info@benrose.org).



The Center for Research and Education **celebrated the launch of Best Practice Caregiving**, a new web-based resource that provides organizations serving family caregivers with tools to easily compare and select evidence-based programs for dementia caregiving.

**best practice caregiving** | Guiding organizations to dementia programs for family caregivers  
 A partnership between Benjamin Rose Institute on Aging and Family Caregiver Alliance

## 2020 FUNDING SOURCES

### Other Sources (continued)

Cuyahoga County Department of Development	LSC Services Corp.	Older Americans Act, Title III	UnitedHealthcare
"Cuyahoga County Division of Senior and Adult Services"	McGregor PACE	Optum	Village of Oakwood
Enterprise Community Partners	National Community Reinvestment Coalition	PASSPORT Medicaid Waiver	Western Reserve Area Agency on Aging
Evidence-Based Programs Contracts	New Market Tax Credits	Paycheck Protection Program (PPP)	
Gifts and Donations	Ohio Department of Aging	Real Estate Commissions	
Great Lakes Realty	Ohio Department of Developmental Disabilities	Research Evaluation Contracts	
Greater Cleveland Food Bank	Ohio Department of Education Child and Adult Care Food Program	Solon Senior Center	
Healthways	Ohio Department of Education Child and Adult Care Food Program	TRIO Community Meals	
IMPACT Solutions	Ohio Department of Medicaid	U.S. Department of Agriculture	
Licensing Fees	Ohio Department of Mental Health and Addiction Services	U.S. Department of Housing and Urban Development	
		United Way	

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# 235,990

meals were delivered to older adults as our demand for home-delivered meals doubled.



# donors

2020 DONORS

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

Meals on Wheels America  
Edwin T. & Mary E. Hamilton Fund  
The Cleveland Foundation  
Third Federal Foundation

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

Bank of America Foundation  
Hal H. Hill Memorial Fund  
JPMorgan Chase Foundation  
The Norma Witt Jackson Fund  
The Helen C. Cole Charitable Trust  
United Way of Greater Cleveland  
Westfield Insurance Foundation

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

Anonymous  
Anthem Foundation  
ARELLO Foundation

The Hankins Foundation  
Norton-White-Gale Trust  
Ohio Department of Mental Health and Addiction Services  
U.S. Bank Foundation  
Woodruff Foundation

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

Anonymous  
Orion & Buffy Bell  
CareSource Foundation  
Goodrich-Gannett Neighborhood Center  
Keystone Technology Consultants  
The Samuel H. & Maria Miller Foundation  
PNC Foundation  
TCF National Bank  
Third Federal Savings & Loan  
Union Home Foundation  
Wells Fargo Foundation

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

Katherine Barr Hollingsworth & Adam Hollingsworth  
BNY Mellon  
Citizens Bank  
Adam B. Denison  
Family Heritage Global Life  
Fidelity Brokerage Services LLC  
David & Inez Myers Foundation  
National Association of Nutrition and Aging Services Program (NANASP)  
Kirk Schmink & Mary Beth Majoros  
Frances Lennie Snider Memorial Fund  
Elizabeth & Frederick Stueber  
Amy & Anthony Vegh  
**Benefactors (\$1,000 - \$2,499)**  
Nancy A. Adams  
Akron Community Foundation  
AllianceBernstein LP

American Foundation  
Kathryn J. Bryan & Mark A. Aronica  
Calfee  
Civista Bank  
Anne-Marie E. & Andrew R. Connors  
Mary F. & William E. Conway  
Emily A. Drake  
Cynthia H. Dunn & Dale Cuthbertson  
Susan Eagan  
Mrs. Oliver Emerson  
Mary Ruth & Joseph Hill  
Katherine Barr Hollingsworth & Adam Hollingsworth  
HW & Company  
Hyster-Yale Materials Handling  
Jewish Federation of Cleveland  
Kathryn & James Kaesberg  
Christine & Richard Lobas

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## 2020 DONORS

### Benefactors (continued)

Catherine L. & Edward A. Lozick Foundation

Lori & Richard Lozier

Carla Macklin

Mary & Brian Marita

Jennifer & Dale Markworth

Matz, Blancato & Associates Inc.

Barbara Mayher Lopez

Eileen McConville

Bea McPherson

Craig & Mary Jo Morford

NFP Corp.

Charles & Patricia Nock

Frank Novak

Robert L. Oldenburg

Hermine & David Ostro

Henry Ott-Hansen

Edward Richard

Dale & Joyce Rothenberger

John & Sally Schulze

The Schwab Fund for Charitable Giving

Studiothink

Belva Denmark Tibbs & Marc Tibbs

Annapurna Valluri

Lucy & Charles Weller

### Patrons (\$500 - \$999)

David Bass & Katherine Judge

Sophie Burkart & Rob Coppenhaver

The Catholic Foundation

Paul & Anne Eickmann

Farida & Muhammad Ejaz

Amy & Thomas Gilchrist

Mary Ellen Halterman

Barbara Bellin Janovitz & Lee Janovitz

Beverly Katz

Alice J. Kethley

McGregor PACE

Allison & Thomas E. Morford

Suzanne & Dale Omori

Sarah A. Ott-Hansen

Jack Richard

Janet & Michael Schneider

Dr. Frederick & Joyce Tavill

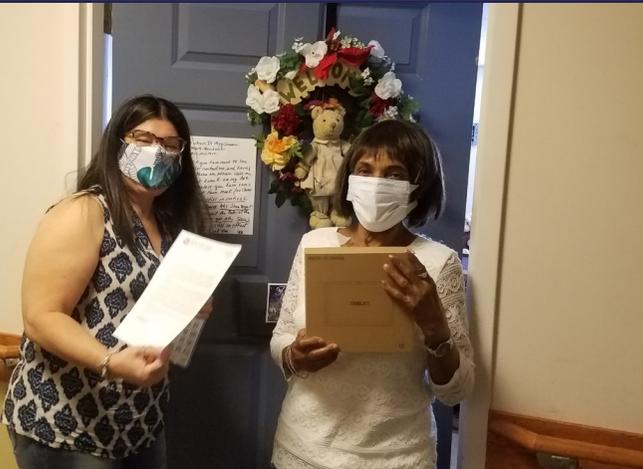
Tommy's

Vanguard Charitable Giving

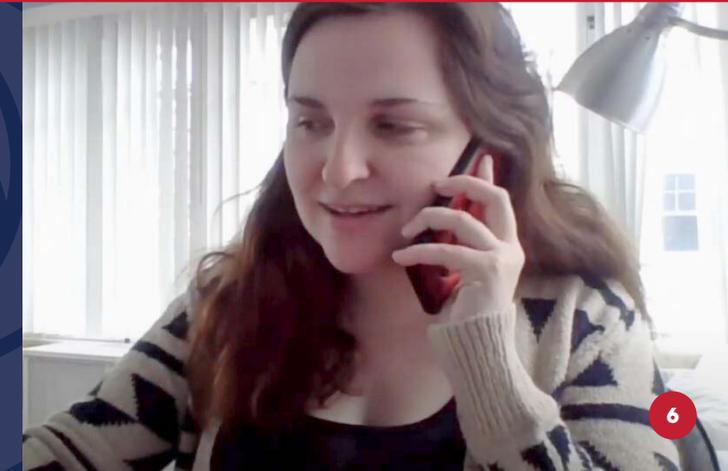
Carol L. Whitlatch & Mary Beth Bartholomew

**We're grateful to our Sponsors (\$250 - \$499) & Friends (up to \$249) for their support. A full list can be found [here](#).**

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Case Managers from our Behavioral Health Services department **trained clients to use tablets and telehealth**, removing digital barriers.



# tribute gifts

TRIBUTE GIFTS

## In Honor Of

### **John Barkey**

Nanette Barkey

### **Grace Caliguire**

Marisa Caliguire

### **Marisa Caliguire**

Myles Lundberg

### **Myles Caliguire**

Marisa Caliguire

### **Linda Cardellini**

Jennifer Cardellini

### **Christina Cardellini-Rockey**

Jennifer Cardellini

### **Andy Connors**

David McCarty

### **Christine Connors**

Anne-Marie E. Connors

### **Daniel Connors**

Anne-Marie E. Connors

### **Rob Coppenhaver**

Sophie Burkart

### **Nathan Creviston**

Jennifer Cardellini

### **G. William Daly, Sr.**

Jennifer Cardellini

### **Mr. and Mrs. G. William Daly**

Jennifer Cardellini

### **Amara Grace Caliguire Danchin**

Marisa Caliguire

### **Lee Fischer**

Shirley Duncan

### **Kevin Fraser**

Anne-Marie E. Connors

### **Tonie Fraser**

Anne-Marie E. Connors

### **Peg Hayes**

Julie Hayes

### **Rick Hayes**

Julie Hayes

### **BeeDee Hein**

Marisa Caliguire

### **Commander Jones**

Anonymous

### **Muffy Kaesberg**

Lisa V. Vigil Schattinger

### **Aurelia Lundberg**

Marisa Caliguire

### **Alessandra Lundberg**

Marisa Caliguire

### **Daria Grace Lundberg**

Marisa Caliguire

### **Mary S. Marita**

James H. Grant, Sr.

### **David McCarty**

Anne-Marie E. Connors

### **Beth McCarty**

Anne-Marie E. Connors

### **Miriam Rose**

Anne-Marie E. Connors

### **Andre Wolanin**

Anne-Marie E. Connors

### **Dina Wolanin**

Anne-Marie E. Connors

### **Feliks Wolanin**

Anne-Marie E. Connors

### **Maria Wolanin**

Anne-Marie E. Connors

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Volunteers made

**17,253**

wellness calls to our  
homebound clients.



## TRIBUTE GIFTS

### In Memory Of

#### **Bonnie & Harold Billnitzer**

Khalid Khattab

#### **John Blassingame**

Rob Allanson

Nancy H. Blickensderfer

Deb DeBenedictis

Alexandra DeYoung

Kathryn Giller

Kathy Hartly

Carol Hughes

Rebecca Odell Leonello

Jack Odell

Scott Odell

#### **Emma Brackenridge**

Carleen K. Carver

#### **Joseph Cardinale**

Frank P. Cardinale

#### **Margaret Daly**

Jennifer Cardellini

Linda Cardellini

Ellen & Chris Casey

Anne-Marie E. Connors

Roger A. Conti

Paula Cusick

Michele D. Foote

Francis J. Gilroy, MD

Louis W. Giordano

Jeanne M. Hoban

William J. Hefferon

Tim Hellman

Susan D. Hummel

Richard M. Keding

Eric M. Neff

Cynthia H. Taylor

#### **Willie Davis**

Panzica Construction

#### **Sharen Eckert**

Alice L. Otto

#### **Warren P. Kendrick-Richard**

Edward H. Richard

#### **Mrs. GB Kennerdell**

G. Geoffrey Damppeer

#### **Carol Bosworth Leach**

Laura Bosworth

#### **Jennifer Miller**

Frank P. Cardinale

#### **Buster Oldenberg**

Barbara C. Andrews

Alfred H. Oldenburg

Robert L. Oldenburg

#### **Anne Buckley Ott-Hansen**

Sarah A. Ott-Hansen

#### **Samuel Richard Petry, II**

S. Colin G. Petry & Lindsey E.

Petry

#### **Joe Petti**

Miriam S. Rose

#### **Henry & Ida Richard**

Edward H. Richard

#### **Daniel S. Rose\***

Frank P. Cardinale

#### **Dale & Alma Rothenberger**

Dale M. Rothenberger

#### **Barry Tuttle**

Benjamin Rose Board  
of Trustees

#### **Connie Waxman**

Miriam S. Rose

#### **Feliks Wolanin**

Frank P. Cardinale

Miriam S. Rose

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



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 Audra Bennett at 216.373.1608 or [abennett@benrose.org](mailto:abennett@benrose.org). We would like to honor your commitment and dedication to Benjamin Rose.

- Polly Clemo
- Phyllis J. Colarusso\*
- Mary F. & William E. Conway
- Emily A. Drake
- Mary Emerson
- Ruth B. Fiordalis
- Barbara Y. & Peter Galvin
- Catherine R. Gerbic
- Thomas J. Gruber

- David Gunning
- Robin & David Gunning
- Kathryn L. Kaesberg
- Alice J. Kethley, PhD
- Raymond Lusin
- Darleen G. McGeady
- Linda S. Noelker, PhD
- Robert L. Oldenburg
- Henry Ott-Hansen
- George McGaughey\* & Sarah A. Ott-Hansen
- Edward H. Richard
- Linda A. Richard
- Dale M. & Joyce E. Rothenberger, Jr.
- Eleanor Delores Santos Estate\*

- Faye M. Shapero\*
- Jackson G. Simpson
- Marcia J. Wexberg, Esq. & Kenneth D. Singer
- Dorothy M. Young\*

\*Deceased

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## Over 2,000

families were served by our evidence-based, caregiver support programs, BRI Care Consultation and SHARE for Dementia.



## GIFTS IN KIND

# gifts in kind

American Chemical  
Anne-Marie E. Connors  
Anonymous  
Maureen Banas  
Barnes & Noble  
Ira-Etta Black  
Amanda Brewton  
Kathryn J. Bryan  
Alexis Clark-Amerson  
Cleveland Sewing Company  
Anne-Marie E. Connors  
Costume Moms Make Medical  
Masks  
Dedicated Senior Medical Center

Paul Dion  
Face Mask Makers of Ohio  
Giant Eagle - Chesterland  
Amanda Govoni  
GreenStar Cooperative  
Hawken School  
Bryan Heidler  
Jeanne M. Hoban  
Home Instead Senior Care  
Mary B. Hubert  
Pauline M. Hyvarinen  
JOANN Fabric and Craft Stores  
Lee Kamps  
Melissa Keenan

Joyce Konieczny  
Paul Levine  
Elizabeth Marita  
Medworks  
Ohio CapTel  
Susan Olsen  
Rinaldi Landscape Co.  
Frances Rucker  
Julie Skinner  
St. Ignatius High School  
TeleHealth Access for Seniors  
The Sanson Company  
Tommy's  
TRIO (Valley Services, Inc.)

United HealthCare Government  
University School  
Lynn M. Winberry  
Peter Zimmerman

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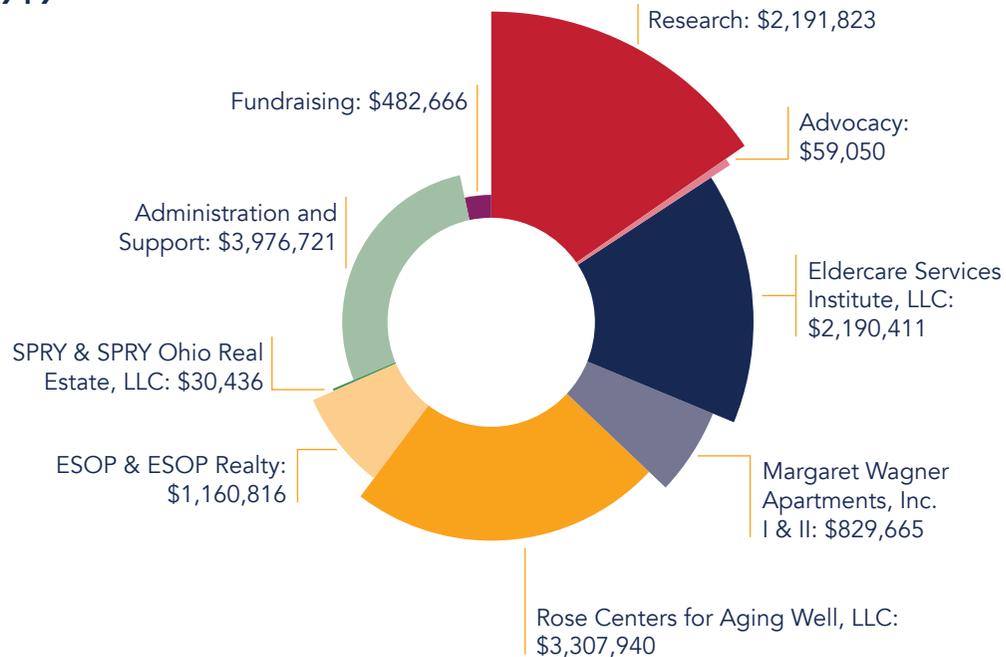
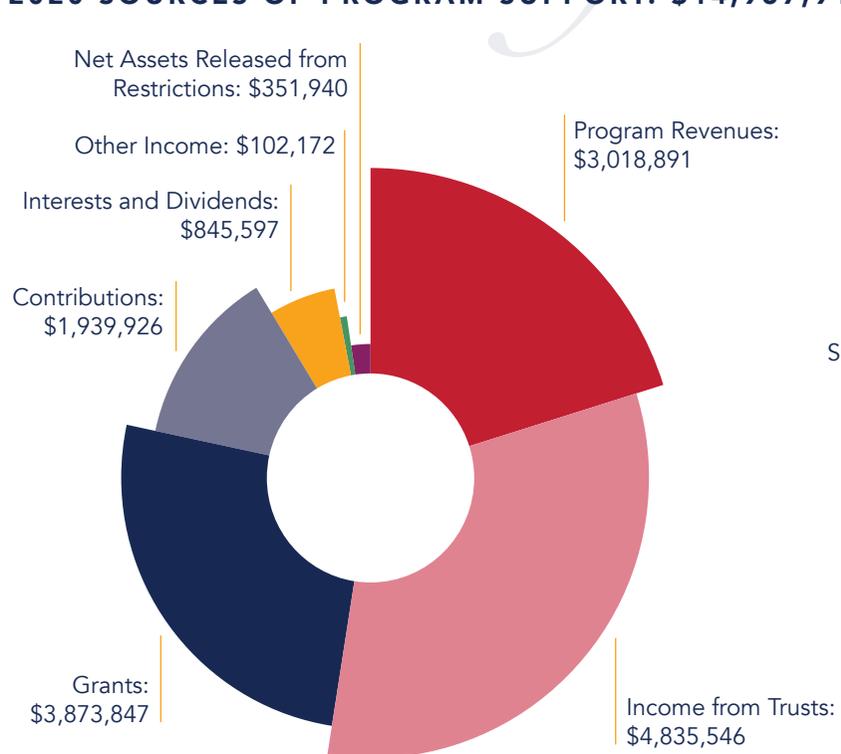


# financials

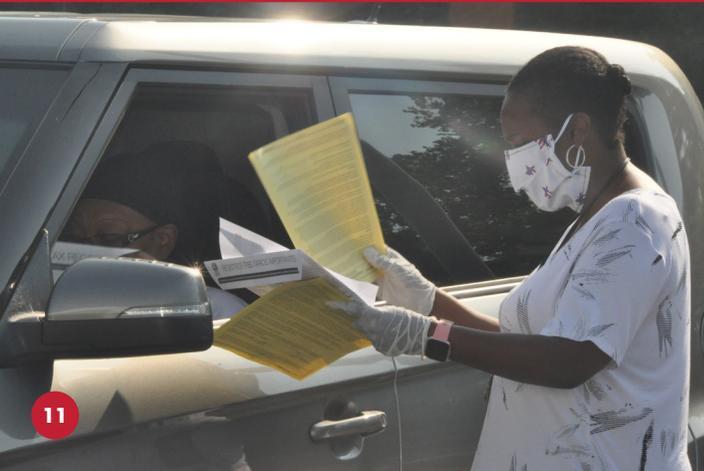
Year ending December 31, 2020

## FINANCIAL STATEMENT

### 2020 SOURCES OF PROGRAM SUPPORT: \$14,967,919



### 2020 COSTS OF PROGRAM SERVICES: \$14,229,528



To get people critically-needed tax refunds, ESOP created a drive-up and drop-off process for free tax preparation, **helping 902 low-to-moderate-income clients save \$250 on average** in filing fees.



# Leadership

## BOARD OF DIRECTORS

## BENJAMIN ROSE INSTITUTE ON AGING

### Officers

Cynthia H. Dunn, *Chair*  
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 Sarah Dimling, *Treasurer*

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 Diane M. Downing  
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Katherine B. Hollingsworth, JD  
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 Denise M. Kresevic, PhD  
 Christine Lobas  
 Lori A. Lozier  
 Jennifer I. Markworth  
 Eileen McConville  
 Sue Omori  
 Elizabeth F. Stueber  
 Annapurna Valluri, PhD

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 President and CEO

**David M. Bass, PhD**  
 Senior Vice President, Research and Education

**Janice Brennan, CPA**  
 Senior Vice President and CFO

**Mary S. Marita, MHSA, LNHA**  
 Senior Vice President and COO

**Michael Billnitzer, SHRM-SCP**  
 Executive Director, ESOP, and Vice President, Benjamin Rose Institute on Aging

**Anne-Marie E. Connors, MAEd**  
 Vice President of Institutional Advancement

**Dabney Conwell, MSSA, LSW**  
 Executive Director, Rose Centers for Aging Well, and Vice President, Benjamin Rose Institute on Aging

**Susan L. Eagan, PhD**  
 Vice President of Strategic Development

**Janet Schneider, MLRHR**  
 Vice President of Human Resources and Corporate Compliance Officer



**Enrollment in WeCare...Because You Do™**  
**tripled** in 2020 thanks to expanded grant-funding in Lake, Geauga, Cuyahoga, Lorain, and Medina counties.



### OUR MISSION

Benjamin Rose Institute on Aging supports caregivers and empowers all people to age well through research, consumer-responsive services, and client advocacy.

### OUR VISION

We seek a world in which all people have the resources to age well in places they choose, ageism is eliminated, and caregivers are provided with supports to sustain their well-being and fulfill their caregiving role.

### OUR STATEMENT ON RACIAL EQUALITY AND SOCIAL JUSTICE

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

### OUR CORE VALUES

- Respecting the intrinsic value and rights of all persons as they age.
- Embracing and increasing diversity and inclusion in our research and service programs and across our organization.
- Responding flexibly, creatively, and quickly to changing community and consumer needs.
- Promoting an organizational culture that fosters innovation in programs and services.
- Sharing our research and service expertise to advance the field of aging.
- Practicing fiscal responsibility, resourcefulness, and accountability.
- Maintaining ongoing vigilance to protect confidential information and privacy.
- Achieving the highest professional and ethical standards.

### OUR GOALS

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