

IMPACT



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ABOUT THIS BOOK

**This is the 2019 Annual Report of the
Benjamin Rose Institute on Aging and its subsidiaries:**
Benjamin Rose Property, LLC
Eldercare Services Institute, LLC
ESOP (Empowering and Strengthening Ohio's People)
Rose Centers for Aging Well, LLC

Dear friends,

At Benjamin Rose Institute on Aging, we are continually working to enhance our effectiveness as a nonprofit advancing support for older adults and caregivers. As a leader in the field of aging, we put our mission into action through thoughtful planning coupled with responsiveness to the evolving needs of the people we serve.

A few years ago, we laid out a vision to be at the forefront of developing and delivering programs and services that promote health and wellness for older adults and caregivers consistent with our mission statement and values.

In this annual report, you will see many examples of how we moved toward that goal. We committed to increasing the dissemination of knowledge and information, expanding research and aligning services through sustainable partnerships. The strategic work we did, and continue to do, in those areas has strengthened our ability to support older adults and caregivers.

A FEW HIGHLIGHTS FROM 2019:

- *We launched our new website at benrose.org as a robust online resource for older adults and families and the professionals who work with them.*
- *With partners from Family Caregiver Alliance and The Gerontological Society of America, we developed Best Practice Caregiving (bpc.caregiver.org), an online database to help organizations across the country access and compare evidence-based programs for caregivers of older adults with dementia.*
- *We began piloting Nutrition Solution, a program providing medically tailored meals and social outreach for older adults following hospitalization.*
- *We embedded financial coaches in The MetroHealth System to help older adults return to the community with financial and housing stability after hospital discharge.*
- *We began offering our evidence-based program, BRI Care Consultation™, as a service, WeCare... Because You Do, helping caregivers of older adults find clear solutions, reduce stress and gain personal support throughout the caregiving journey.*

As of this writing, we are in the midst of the global COVID-19 pandemic. When the pandemic hit in early spring of 2020, we found ourselves well-positioned to pivot services to meet the needs of older adults and caregivers in new circumstances that were changing on a sometimes-daily basis. Our strategic focus enabled us to quickly adjust the way we delivered services, and adapt to increased need in the community coupled with decreased funding from some traditional sources.

You helped us do that. The support of individual donors, foundations and other funders gave us the flexibility to offer services through telehealth, to support our many staff who are now working from home, and to be a reliable resource for the community.

Thank you for your continued trust in Benjamin Rose and your commitment to our mission to advance support for older adults and caregivers.

Sincerely,



Orion H. Bell IV
Orion H. Bell IV
President & CEO



Cynthia H. Dunn
Cynthia H. Dunn
Chairperson

INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

In our last strategic plan, we committed to increasing the **dissemination of knowledge** and information to older adults, caregivers, professionals and policymakers that is relevant to **improving services and supports**.



Malaz Boustani delivers the 13th Annual Katz Policy Lecture

KATZ POLICY LECTURE

Dr. Malaz Boustani, Chief Innovation and Implementation Officer, Indiana University Center for Health Innovation and Implementation Science, delivered the **13th Annual Katz Policy Lecture**, titled “Strategies for Successfully Partnering Community-Based Organizations and Health Systems.”

Dr. Boustani discussed essential elements to create accountable health communities and highlighted the need for continued discussion, focused work and collaboration to provide quality care, proven programs and support to families across the country. His remarks were followed by a reactor panel comprised of Benjamin Rose President and CEO Orion Bell; Dr. Ardeshir Hashmi, Director, Center for Geriatric Medicine, Cleveland Clinic; and Dr. Eric Beck, President, UH Ventures, University Hospitals.



DEMENTIA-INCLUSIVE COMMUNITIES

Benjamin Rose is collaborating with organizations throughout the area on a five-year, \$3.7 million project led by the **Northeast Ohio Medical University (NEOMED)**. The project is funded through a grant to NEOMED from the Health Resources and Services Administration’s **Geriatric Workforce Enhancement Program (GWEP)**.

Throughout the five-year project, titled “Infusing Interprofessional Geriatric Education into Primary Care and Community Environments,” the project’s partners will develop, implement and expand a program to promote **dementia-inclusive communities** in Ohio. Benjamin Rose subsidiary Rose Centers for Aging Well participates as a community-based training site for an experiential training program for primary care providers, faculty, students, patients and caregivers.

The **annual Caregiving Conference** in November 2019 focused on supporting families impacted by dementia and featured a keynote address from **The Very Rev. Tracey Lind**, Episcopal priest, writer, author and dementia advocate living with Frontotemporal Degeneration, and her care partner **Emily Ingalls**, public speaker, writer and dementia advocate. The full-day conference, jointly sponsored by NEOMED and the GWEP, explored how professionals can support individuals living with dementia and their family caregivers. The conference also included an inter-professional simulation training opportunity, developed through the GWEP.

INCREASE THE DISSEMINATION OF KNOWLEDGE & INFORMATION

ONLINE RESOURCE

The Benjamin Rose website (benrose.org) was completely redesigned to include easy-to-use navigation, elevated search functions and a host of resources for aging well in the community. Older people, families and professionals alike will find valuable information in the resource library, which includes consumer-friendly articles on a range of topics, as well as the latest published research from Benjamin Rose. The updated benrose.org, which launched in July 2019, was created with Dunn Solutions Group of Skokie, Illinois.

SHARING BEST PRACTICES

Also in July, Benjamin Rose hosted a delegation from the **Yanbian Autonomous Region in Jilin, China** and shared best practices for delivering services to older adults. The group visited Cleveland, Akron, Washington, DC, and Los Angeles, to gather information on the delivery of long-term services and supports to address the needs of their aging population. The visit was arranged locally by the Council on World Affairs and coordinated by the U.S. Department of State.

SHARING EXPERTISE

Experts from **Benjamin Rose** and subsidiary **Empowering and Strengthening Ohio's People** shared their knowledge in 10 presentations and programs during the 2019 Aging in America Conference in New Orleans, LA. The conference is presented annually by the American Society on Aging.

Benjamin Rose was among 11 community-based organizations and networks selected to participate in a **Medicare Advantage Learning Collaborative (MALC)** from the Aging and Disability Business Institute at the National Association of Area Agencies on Aging and the National Council on Aging. The purpose of the MALC is to provide organizations with the knowledge and skills needed to successfully pursue partnerships and contracts with Medicare Advantage plans to provide home- and community-based services and supports.



Bonnie K. Burman, President, Ohio Council for Cognitive Health, presents at the Caregiving Conference.



Orion Bell, left, with Caregiving Conference keynote speakers Tracey Lind and Emily Ingalls

ALIGNING SERVICES AND SUSTAINABLE PARTNERSHIPS

In our last strategic plan, we committed to aligning services in response to **evolving consumer preferences**, sustainable partnership opportunities, and evidence on **effective practices**.

HELP FOR CAREGIVERS

BRI Care Consultation™ – an evidence-based program developed by the Center for Research and Education – was fully integrated as a service of Benjamin Rose in 2019. The program, now delivered by Benjamin Rose as **WeCare...Because You Do**, helps caregivers develop clear solutions to challenges and provides compassionate, personalized support throughout the caregiving journey. The service is delivered by telephone or email.



IMPROVING FINANCIAL HEALTH

Benjamin Rose subsidiary Empowering and Strengthening Ohio's People (ESOP) and **The MetroHealth System** partnered to develop a program to assist patients in their return to the community by helping them improve their financial health. LIFEPOP, the Linking Financial Empowerment to Patient Outcomes Project, is an innovative medical-financial partnership that embeds ESOP's financial coaches at MetroHealth's main campus and Old Brooklyn locations.

The goal of the program is to positively impact the social determinants of health for older adults, including their financial and housing stability. **LIFEPOP** is funded by **The Cleveland Foundation** and **The Nord Family Foundation**.

PARTNERSHIPS AND PROGRESS

Anthem and **The Intergenerational School** received **2019 Partnerships and Progress Awards**, which recognized community organizations who have partnered with Benjamin Rose subsidiary Rose Centers for Aging Well and have made a direct impact in the lives of Rose Centers participants.

- **Anthem** for stepping in to fill a funding gap for transportation, enabling older adults to participate in programs.
- **The Intergenerational School** for helping to generate programming at each of the Rose Centers, giving students and older adult participants an opportunity to build mutually supportive bonds.

The awards were presented at a May 2019 event, which raised more than \$78,000 in support of the Rose Centers programs.

Special Thank You to our Partnerships and Progress sponsors

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ALIGNING SERVICES AND SUSTAINABLE PARTNERSHIPS

NEW TOOL FOR ORGANIZATIONS PROVIDING DEMENTIA CARE

best practice caregiving | *Guiding organizations to dementia programs for family caregivers*

A partnership between Benjamin Rose Institute on Aging and Family Caregiver Alliance

Best Practice Caregiving, a free online database of vetted, proven dementia caregiving programs, completed testing and was ready to launch in December 2019. The supportive tool, developed by Benjamin Rose and partners at **Family Caregiver**

Alliance and **The Gerontological Society of America**, is a searchable, interactive, data-rich resource that organizations can use to compare and select from more than 40 evidence-based programs across the U.S. The project was funded by **The John A. Hartford Foundation**, **Archstone Foundation** and **The Retirement Research Foundation (now RRF Foundation for Aging)**.

YOUNG PROFESSIONAL COUNCIL FORMS

Emerging leaders from organizations across northeast Ohio joined staff from Benjamin Rose to launch the **Benjamin Rose Young Professional Council**, which formed in fall 2019 and held its first official meeting in January 2020. The group provides opportunities for volunteer involvement in fundraising, advocacy, education and awareness in support of Benjamin Rose and its subsidiaries. Benjamin Rose Board member **Katy Bryan** of Skylight Financial led the development of the Council.



Young Professional Council Bingo Night

IMPROVING NUTRITION, REDUCING ISOLATION POST DISCHARGE

The Nutrition Solution program, developed as part of **Rose Centers Executive Director Dabney Conwell's Innovation Fellowship** with the **Sisters of Charity Foundation**, assists older adults with chronic illnesses when they are discharged from the hospital by providing medically tailored meals and weekly check-in calls from volunteers to reduce isolation.



Dabney Conwell, left, presents a Partnerships and Progress Award to Anthem

EXPANDING RESEARCH

In our last strategic plan, we committed to **expanding current research** on caregiving, service access and impact, and wellness; pursuing new research topics and product development; and marketing **research-based products** to organizations and consumers.

EXPANDING DELIVERY OF EVIDENCE-BASED PROGRAMS

Thanks to a two-year grant from Arthur N. Rupe Foundation, 450 individuals with chronic conditions and their caregivers in northern California will benefit from **BRI Care Consultation™**, an evidence-based program developed by Benjamin Rose. Ultimately, these organizations will be well-positioned to sustain delivery beyond the project period and will become cornerstones for responding to the needs of family caregivers in their communities.



ENHANCING UNDERSTANDING THROUGH STORYTELLING

Benjamin Rose researchers led a two-year pilot study of **LifeBio**, a non-pharmacological intervention to help staff in nursing homes better understand residents through their personal life stories and improve delivery of person-centered care. The study involved 16 nursing homes in northeast Ohio. The overall findings indicated that residents and staff who participated in the program found it to be mostly a positive experience. There is also some indication that life story work may help reduce depression by promoting better engagement. The LifeBio project was funded by the **Ohio Department of Medicaid** and administered by the **Ohio Colleges of Medicine Government Resource Center**.

IDENTIFYING AND RESPONDING TO SELF-NEGLECT

Benjamin Rose researchers collaborated on a project with partners at the **Oklahoma Department of Human Services, Adult Protective Services (APS), Oklahoma City Indian Clinic** and a software firm to enhance practice related to self-neglect among older adults and adults with disabilities. The project, funded by the **Administration for Community Living**, aims to improve the health and well-being of alleged victims of self-neglect by linking them to services and community resources. The project includes training APS staff on self-neglect, and enhancing practice to include care planning, follow-up and service coordination. If the project is proven effective, Oklahoma will sustain the enhanced self-neglect practice, introduce it statewide, and share the information with other states interested in enhancing their practices related to self-neglect.



Staff from Oklahoma Adult Protective Services meet with a Benjamin Rose research team.

RESPONDING TO COVID-19

As 2019 ended, a novel coronavirus emerged, leading to a global pandemic in spring of 2020. While everyone was impacted in some way by the spread of Coronavirus Disease, or COVID-19, the risk for severe illness from the disease increases with age, with older adults at highest risk.

As a nonprofit organization serving older adults and caregivers, Benjamin Rose Institute on Aging was faced with numerous challenges in the wake of the pandemic. With the strategic work undertaken in 2019 and earlier, Benjamin Rose was well-positioned to pivot services to meet the changing needs of older adults and caregivers.



Well-positioned to respond to evolving needs.



Staff provided telehealth, helped with home-delivered meals and provided telephone wellness checks and assurance calls to older adults in the community.



COVID-19 FAQs, resources for staying active and service updates were delivered regularly to residents at Margaret Wagner Apartments and home-delivered meals clients.



Organizations and individuals answered our call for personal care items and other necessities, as well as volunteers and needed funding to enable continued service.

2019 FINANCIALS

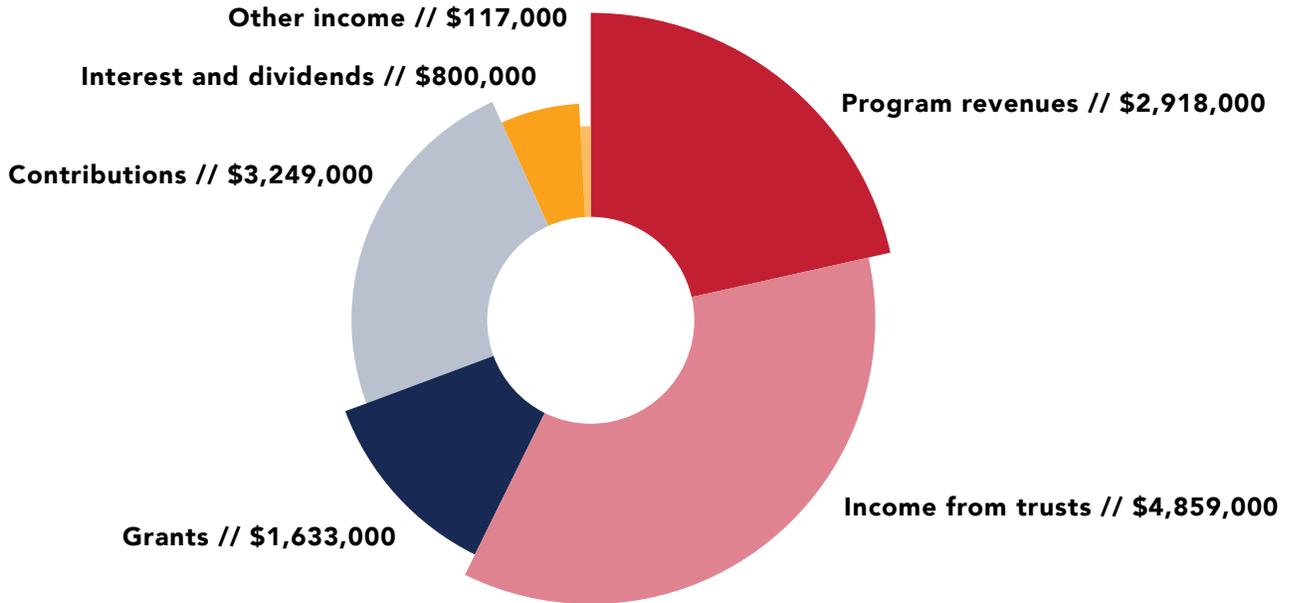
TOTALS PER AUDITED FINANCIAL REPORTING

NET PROGRAM REVENUE:	<u>2019</u>	<u>2018</u>
Eldercare Services Institute	\$ 1,131,435	\$ 1,464,262
Center for Research and Education	\$ 201,823	\$ 210,438
Benjamin Rose Property	\$ 858,703	\$ 821,939
Rose Centers for Aging Well	\$ 527,857	\$ 1,166,505
Empowering and Strengthening Ohio's People (ESOP)	\$ 198,261	\$ 182,071
Benjamin Rose Home Care*	—	\$ 28,015
Grants	\$ 1,633,033	\$ 2,682,599
Net Program Revenue	\$ 4,551,112	\$ 6,555,829
OTHER REVENUE:		
Interest and Dividends, Net	\$ 799,960	\$ 731,773
CONTRIBUTIONS:		
In-kind	\$ 1,361,038	\$ 1,403,724
Other	\$ 1,887,620	\$ 517,812
Other Income	\$ 48,474	\$ 253,432
Total Other Revenue	\$ 4,097,092	\$ 2,906,741
Trust Distributions	\$ 4,859,341	\$ 4,683,073
Net Assets Released from Restrictions	\$ 68,564	—
	\$ 13,576,109	\$ 14,145,643
EXPENSES:		
Eldercare Services Institute	\$ 2,512,171	\$ 2,956,153
Center for Research and Education	\$ 2,413,341	\$ 2,452,733
Benjamin Rose Property	\$ 1,939,125	\$ 1,745,077
Rose Centers for Aging Well	\$ 3,281,584	\$ 3,149,313
Empowering and Strengthening Ohio's People (ESOP)	\$ 1,084,190	\$ 1,100,094
Benjamin Rose Home Care*	\$ 212	\$ 194,910
Margaret Wagner Apartments I, II	\$ 664,769	\$ 663,177
SPRY & SPRY Ohio Real Estate LLC	\$ 40,766	\$ 42,555
Administration	\$ 2,989,947	\$ 4,509,264
Advocacy	\$ 74,572	\$ 150,060
Marketing	\$ 286,652	\$ 295,757
Fundraising	\$ 297,315	\$ 311,987
	\$ 15,584,644	\$ 17,571,080

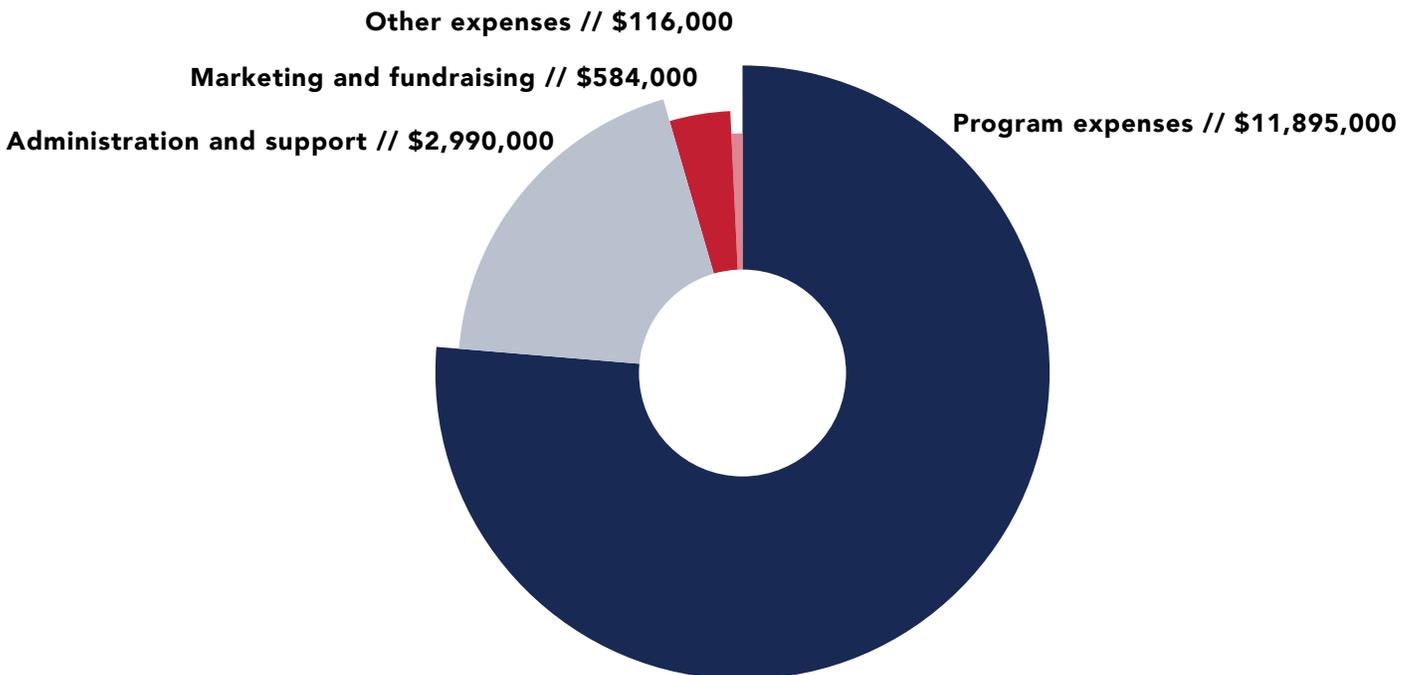
* ceased operations of Benjamin Rose Home Care in December 2018

2019 FINANCIALS

2019 SOURCES OF PROGRAM SUPPORT // \$13,576,000



2019 COSTS OF PROGRAM SERVICES // \$15,585,000



BENJAMIN ROSE BY THE NUMBERS

HOME-DELIVERED MEAL RECIPIENTS	948
MEALS DELIVERED	158,059
PARTICIPANTS IN CONGREGATE MEALS	784
CONGREGATE MEALS SERVED	49,034
TRANSPORTATION TRIPS PROVIDED	19,067
PARTICIPANTS IN ROSE CENTERS RECREATIONAL PROGRAMS	551
PARTICIPANTS ATTENDING SENIOR FINANCIAL EDUCATION WORKSHOPS	2,452
SENIOR FINANCIAL EDUCATION WORKSHOPS HELD	249
BENEFIT ASSESSMENTS CONDUCTED	465
NEW CLIENTS RECEIVING SENIOR FINANCIAL CAPABILITY COUNSELING & COACHING	312
CLIENTS SERVED THROUGH BEHAVIORAL HEALTH SERVICES	551
ACTIVE RESEARCH PROJECTS AND PRODUCT INITIATIVES	18
VOLUNTEER HOURS DELIVERED BY SENIOR COMPANIONS	35,808

FINANCIALS

2019 FUNDING SOURCES

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 Administration for Community Living
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Western Reserve Area Agency on Aging

FINANCIALS

2019 FUNDING SOURCES

OTHER SOURCES

- Apartment Tenant Fees
- Benjamin Rose Trust Funds
- Benjamin Rose Property LLC Leases
- Buckeye Health Plan
- CAHPS Survey Contracts
- CareSource
- Centers for Medicare and Medicaid Services
- City of Cleveland
- City of Shaker Heights
- Client Fees
- 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
- IMPACT Solutions
- LSC Services Corp.
- McGregor PACE
- New Market Tax Credits
- Ohio Department of Aging
- Ohio Department of Developmental Disabilities
- Ohio Department of Education—Child and Adult Care Food Program
- Ohio Department of Medicaid
- Older Americans Act, Title III
- Optum
- PASSPORT Medicaid Waiver
- Research Evaluation Contracts
- Solon Senior Center
- TRIO Community Meals
- UnitedHealthcare
- United Way
- U.S. Department of Agriculture
- U.S. Department of Housing & Urban Development
- Village of Oakwood



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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.**

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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 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. Create a new business model and funding strategies to support organizational growth.

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.





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