



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY

evaluate

2021 ANNUAL REPORT



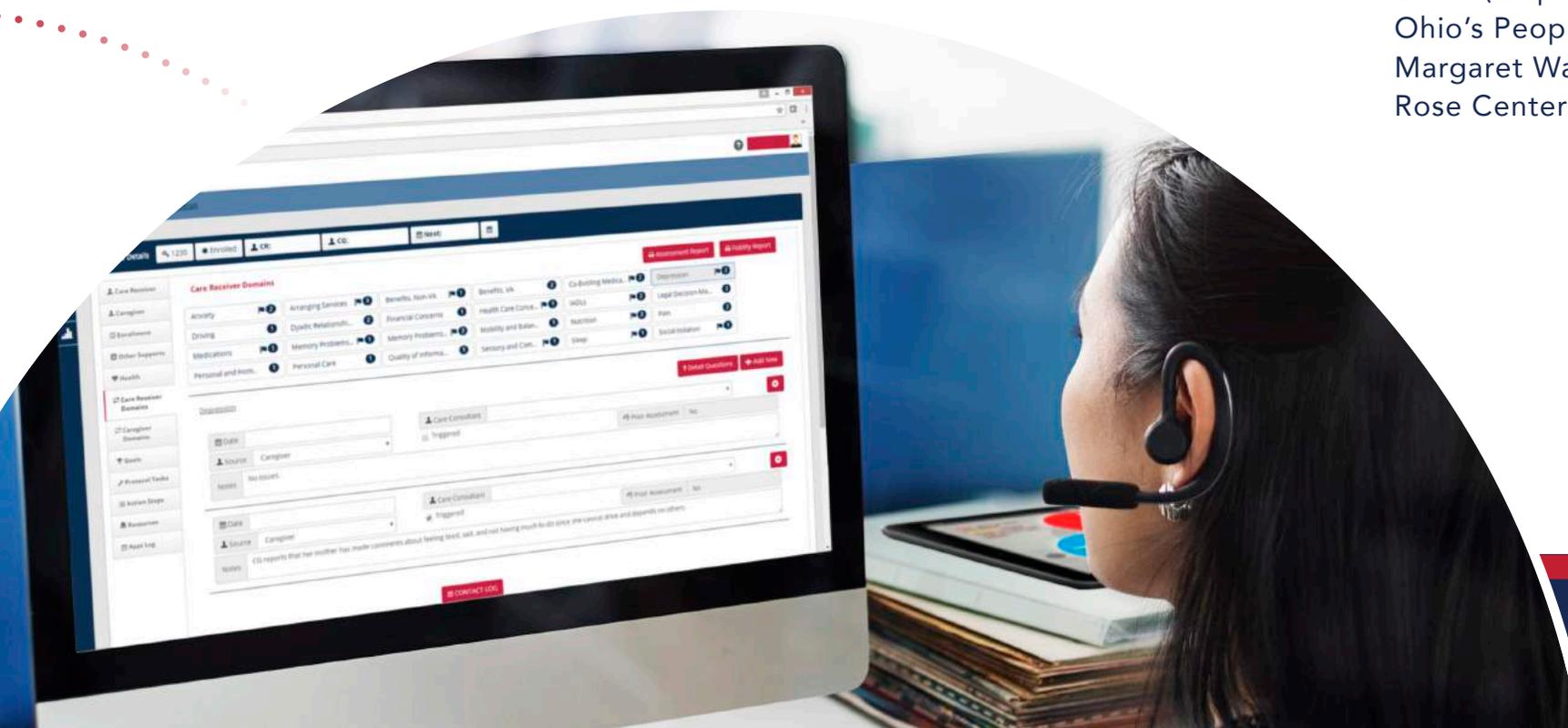
TABLE OF CONTENTS

MESSAGE FROM CEO & BOARD CHAIR	2
FUNDING SOURCES	3
THE LEGACY SOCIETY	5
DONORS	6
FINANCIAL STATEMENTS	9
LEADERSHIP	10
2021-2023 STRATEGIC PLAN	11
2021 HIGHLIGHTS	13

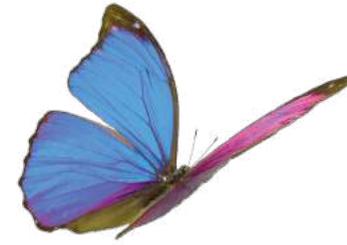
ABOUT THIS BOOK

This is the 2021 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



evolve



Over a century ago, Benjamin Rose had a vision for an organization that would support older adults and allow them to age in their homes in comfort and dignity. The mission has been constant throughout our history. But the ways we have fulfilled that mission have adapted over time, as community resources, public policy and consumer needs have changed. Our commitment to adapt and evolve is the key to our continued success and relevance for older adults and the people who care about them.

2021 was a year to adapt. To evolve. It was a year to reconsider what we do, and how we do it. It was an opportunity to redefine success. And, to renew our commitment.

In 2021. . .

We served more people.

We grew our programs and expanded our services.

And we did what we do, better.

The story of Benjamin Rose Institute on Aging and its subsidiaries found in this annual report is a celebration of change and adaptation and improvement. This past year, we expanded existing programs and services, and added new ones. It was a year we served more people than before. It was a year we renewed our focus on the experiences of our clients and their families. And, it was a year made possible through the generous support of our donors and commitment of our board, staff and community partners. Thank you for your continued trust in Benjamin Rose and our mission to advance support for older adults and caregivers.



Nancy A. Adams

Nancy A. Adams
Board Chair



Orion H. Bell IV

Orion H. Bell IV
President & CEO

funding



Sources

Administration for
Community Living

Alcohol, Drug Addiction
& Mental Health Services
(ADAMHS) Board of
Cuyahoga County

Alzheimer's & Dementia
Care Services of
Northwestern Ohio

Alzheimer's San Diego

Arizona State University

Bay Aging - Area Agency
on Aging

Buckeye Health Plan

CareSource

Case Western
Reserve University

Centers for Medicare &
Medicaid Services

City of Cleveland

City of Shaker Heights

Collaborative Approach to
Public Goods Investments

Corporation for National &
Community Service

Cuyahoga County
Department of Development

Cuyahoga County Division of
Senior & Adult Services

Employer Retention
Tax Credit

Enterprise
Community Partners

Georgia Department of
Health & Human Services

Human Animal Bond
Research Institute

IMPACT Solutions

John A. Hartford Foundation

LifeBio, Inc.

McGregor PACE

Mental Health America
of Northern Kentucky &
Southwest Ohio

National Community
Reinvestment Coalition

National Institute on Aging

Northeast Ohio
Medical University

Ohio Department of Aging



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

2021 FUNDING SOURCES

Ohio Department of
Budget Management

Ohio Department
of Medicaid

Ohio Department of Mental
Health & Addiction Services

Ohio Housing
Finance Agency (OHFA)

Oklahoma Department of
Human Services

Older Americans Act, Title III

Optum

PASSPORT Medicaid Waiver

Paycheck Protection
Program (PPP)

RRF Foundation for Aging

TRIO Community Meals

UCLA - Patient-Centered
Outcomes Research Institute
(PCORI)

U.S. Department
of Agriculture

U.S. Department of Health &
Human Services

U.S. Department of Housing
& Urban Development

United Way of
Greater Cleveland

UnitedHealthcare

University of
Southern California

Village of Oakwood

Western Reserve Area
Agency on Aging



Legacy

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 Audra Bennett at 216.373.1608 or abennett@benrose.org. We would like to honor your commitment and dedication to Benjamin Rose.

Aloise O. Bates*
Polly Clemo
Phyllis J. Colarusso*
Lois H. Cole*
Mary F. & William E. Conway
Sue Dempsey
Emily Ann Drake
Mary & Oliver Emerson*
Ruth B. Fiordalis

Barbara & Peter* Galvin
Catherine R. Gerbic
Thomas* and Judith Gruber
Robin & David Gunning
Kathryn & James Kaesberg
Alice J. Kethley*
Raymond Lusin*
George McGaughey* & Sarah A. Ott-Hansen
Darleen G. McGeady
Linda S. Noelker
Robert L. Oldenburg
Henry Ott-Hansen

Edward H. Richard
Linda A. Richard-Schenk
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*

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.

donors

DONORS

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

The Cleveland Foundation
Edwin T. & Mary E.
Hamilton Fund
Ohio Office of
Budget & Management

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

Arthur N. Rupe Foundation
Huntington Bank
KeyBank Foundation
The Norma Witt
Jackson Fund
Ohio Department of Mental
Health & Addiction Services
Ohio State Bar Foundation

Third Federal Foundation
U.S. Bank Foundation
Westfield Insurance
Foundation

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

Anonymous
Anonymous
ARELLO Foundation
Citizens Bank
Eva L. & Joseph M.
Bruening Foundation
The Hankins Foundation
The Higley Fund
Home Instead Senior Care

Meals on Wheels America
Norton-White-Gale Trust
Ocwen Financial Corporation
Ridgecliff Foundation

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

AARP Ohio State Office
Orion & Buffy Bell
CareSource Foundation
HW&Co.
Kirk Schmink &
Mary Beth Majoros
TCF National Bank
Thatcher Family Fund
Third Federal Savings & Loan
Union Home
Mortgage Foundation

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

Nancy A. Adams
Anonymous
Mary F. & William E. Conway
Cuyahoga Arts & Culture
Frances Lennie Snider
Memorial Fund
Healthify
Keystone Technology
Consultants
Edward H. Richard
Bertrand H. &
Robyn M. Smyers
Elizabeth & Frederick Stueber





donors

Subaru Share the Love –
Meals on Wheels
Thompson Hine LLP
United Black Fund of
Greater Cleveland
Western Reserve Area
Agency on Aging

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

American Foundation
Anonymous*
John W. Barkey
Nancy M. Barnes
Michael M. Billnitzer
BNY Mellon
Kathryn J. Bryan &
Mark A. Aronica

Calfee
Charles Schwab & Co.,
Inc.- Legacy Village
The Cleveland Clinic
Edith W. Corning*
David & Inez
Myers Foundation
Teresa Dews
Emily Drake
Cynthia H. Dunn &
Dale Cuthbertson
Oliver* & Mary* Emerson
Mary Ruth & Joseph Hill
Katherine Barr Hollingsworth
& Adam Hollingsworth
Hyster-Yale
Materials Handling

Dwight S. &
Patricia Jordan
Kathryn & James Kaesberg
Alice J. Kethley
Herbert F. Leisy*
The Lozick Family Foundation
Lori A. Lozier
The Macklin Family Fund
Mary & Brian Marita
Jennifer &
Dale Markworth
Eileen McConville
Bea McPherson
Craig & Mary Jo Morford
Myrtle I. Muntz
Network for Good
Frank S. Novak

Robert L. Oldenburg
*In memory of Barbara
S. Oldenburg**
Hermine & David Ostro
Dale M. & Joyce
Rothenberger
*In memory of Alma
Rothenberger**
The Samuel H. & Maria
Miller Foundation
John B. & Sally Schulze
Skylight Financial Group
Studiothink
Belva Denmark Tibbs &
Marc Tibbs
University Circle Inc.
Annapurna Valluri &
Anant Madabhuski

*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.*

DONORS

Visiting Angels
Senior Homecare
Woodhill Plating
Works Company

Patrons (\$500 - \$999)

Audra & Matt Bennett
Center for
Community Solutions
Dabney Conwell &
Deirdre Jones
Geoffrey Dampeer
Diane Downing &
Thomas D. Corrigan
Muhammad & Farida Ejaz
*In memory of Firdaus Ali
Abbas Jamall**
Leigh & Andrew Fabens

Ruth Fiordalis
Thomas C. &
Amy Scott Gilchrist
Robin & David Gunning
Constance Hill-Johnson
Barbara Bellin Janovitz &
Lee Janovitz
David Bass &
Katherine Judge
*In memory of
Margaret L. Daly**
*In honor of
Wendy J. Looman**
Beverly Katz
Legal Aid Society
Valerie J. Maczak
Matz, Blancato &
Associates Inc.

Barbara Mixon
Allison & Thomas Morford
Henry Ott-Hansen
Sarah A. Ott-Hansen
S. Colin G. &
Lindsey E. Petry
Jack Richard
Rita Roth & Michele
Roth-Kauffman
Janet Schneider
Shaker Quality Auto Body
Frederick & Joyce Tavill
In honor of Cynthia Walker
Amy & Anthony Vegh



We're grateful to our
Sponsors (\$250 - \$499) and
Friends (up to \$249) for their
support. A full list can be found
on our website at
www.benrose.org/2021donors.

Gifts In Kind

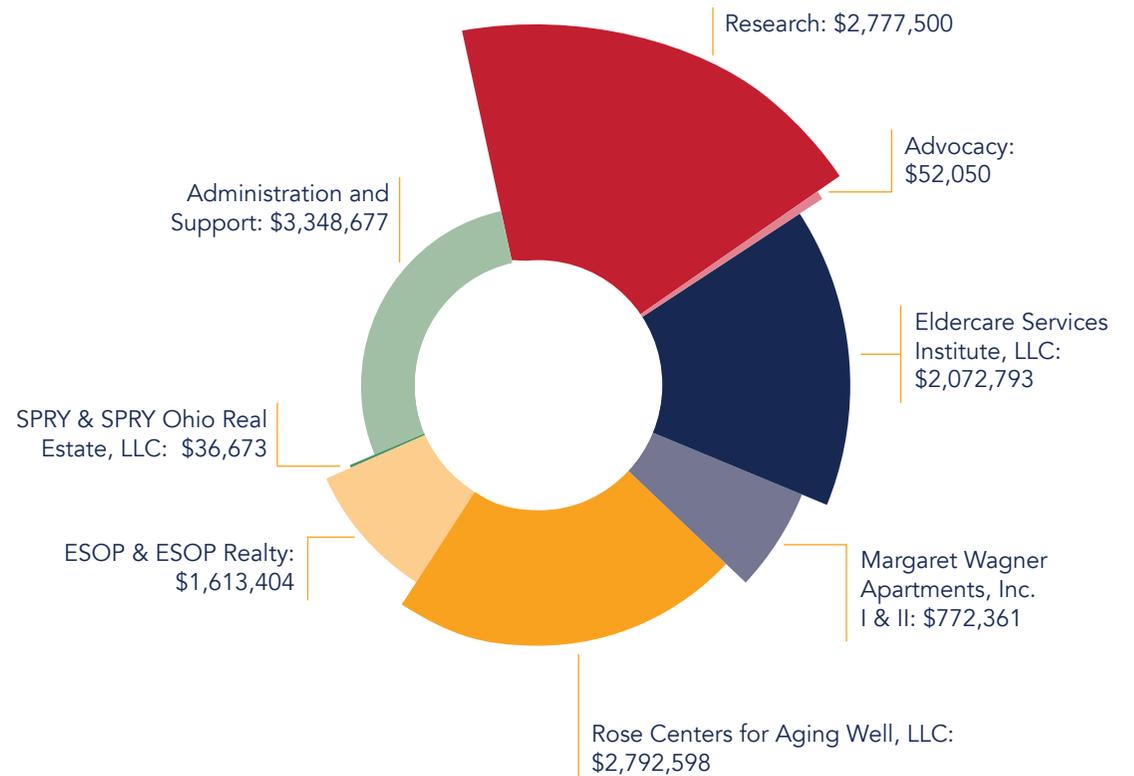
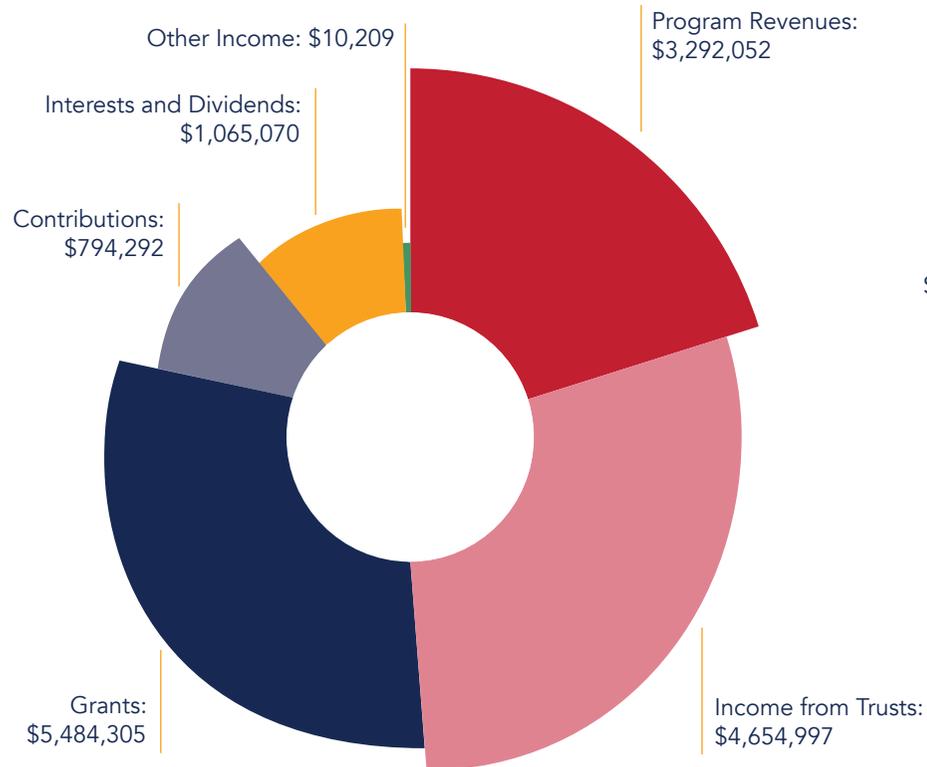
Sandy Klopp
Joyce Konieczny
Paul Levine
Magnificat High School
Jennifer Markworth
Susan Sutton

financials

FINANCIAL STATEMENT

Year ending December 31, 2021

2021 SOURCES OF PROGRAM SUPPORT: \$15,300,925



2021 COSTS OF PROGRAM SERVICES: \$13,466,056

Leadership

LEADERSHIP



BOARD OF DIRECTORS

Officers

Nancy A. Adams, JD
Chair

Sarah Dimling
Vice Chair

Annapurna Valluri, PhD
Treasurer

Constance Hill-Johnson
Secretary

Cynthia H. Dunn
Past Chair

Nancy M. Barnes, JD

Katy Bryan, PhD

Belva Denmark Tibbs

Teresa Dews, MD
(elected 03/2021)

Diane Downing

Patricia R. Frutig, JD

Amy S. Gilchrist, JD

Giesele R. Greene, MD
(resigned 10/2021)

Mona Gupta, MD

Katherine Hollingsworth, JD

Yvette Ittu

Barbara Bellin Janovitz, JD

Muffy Kaesberg

Hermine Krasny, CPA

Denise Kresevic, PhD

Christine Lobas
(resigned 05/2021)

Lori Lozier

Jennifer Markworth

Eileen McConville

Sue Omori

Elizabeth F. Stueber

BENJAMIN ROSE INSTITUTE ON AGING

Orion H. Bell IV, MBA
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

Audra Kessler Bennett
Vice President of
Institutional Advancement

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

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



2021~2023

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 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 STATEMENT ON RACIAL EQUITY 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.



STRATEGIC PLAN

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.

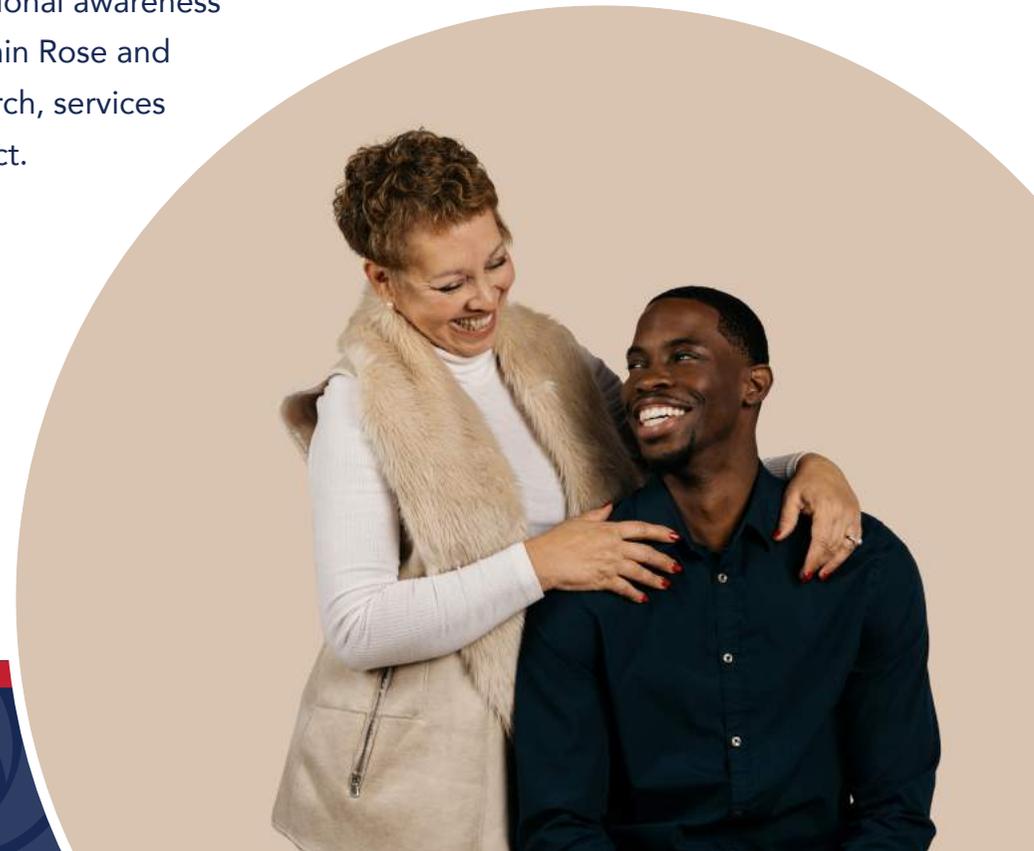
3 Expand our applied research, consumer education programs and development of innovative solutions for older adults and caregivers.

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.





243,041 nutritious meals were delivered to homebound older adults, including **47,109** medically tailored meals for older adults with chronic diseases such as cardiovascular disease, diabetes and hypertension.



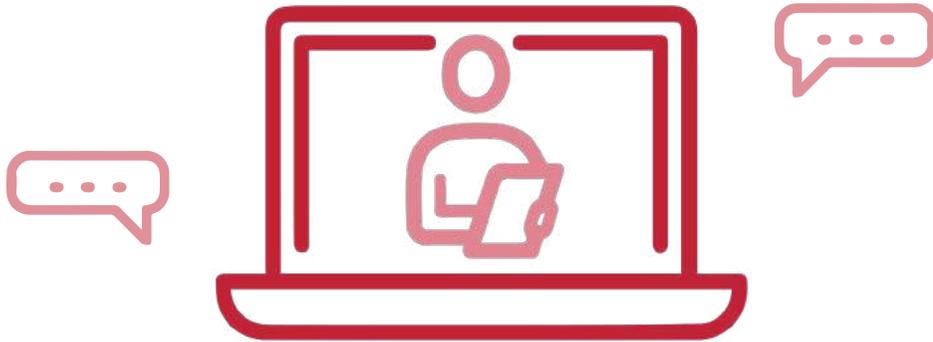
254 volunteers provided **6,393** hours of service to Benjamin Rose programs and services.



In 2021, ESOP's average client saw an increase of **\$1,456** in savings, a **\$242** reduction in monthly expenses, a **\$1,248** decrease in debt and a credit score improvement of **42** points – life-changing for our clients who earn **\$16,911** a year, on average.



The Rose Centers for Aging Well welcomed back nearly **400** older adults to their centers for lunch and recreational programming.



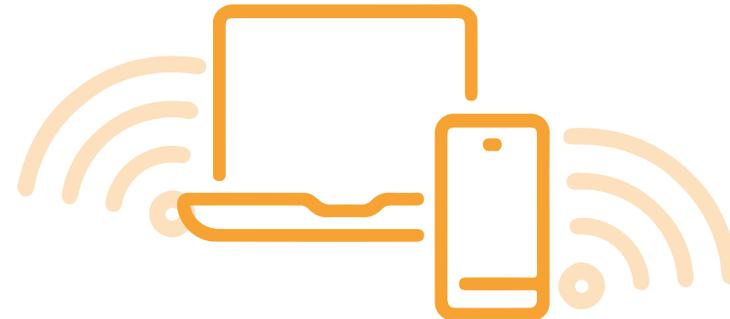
BRI Care Consultation, an evidence-based care-coaching program, was **expanded** to meet the specialized needs of adults with intellectual and developmental disabilities, as well as their family or friend caregivers.



Branches Real Estate helped **38** clients purchase homes, totaling **\$5,147,550** in sales.



Enrollment in **WeCare...Because You DoSM** doubled in 2021 thanks to increased grant funding under the Older Americans Act plus funding from The Administration for Community Living (ACL), which allowed us to expand services to Lake, Geauga, Cuyahoga, Lorain and Medina counties.



With partners, ESOP launched the **Connecting Seniors to Technology (COST)** program, designed to help bridge the Digital Divide by providing older adults with free technology training, a laptop and internet, along with financial capability resources.



FOLLOW US ON SOCIAL MEDIA

Benjamin Rose Institute on Aging



@BenRose1908



Benjamin Rose Institute on Aging



@BenRose1908



@BenRose1908

