



BENJAMIN ROSE
INSTITUTE ON AGING
SERVICE • RESEARCH • ADVOCACY

2022 ANNUAL REPORT

STANDING

Strong



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ABOUT THIS BOOK

This is the 2022 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
- Rose Centers for Aging Well, LLC



STANDING

Strong

Standing strong is about perseverance. It is striving for success despite long odds. It is overcoming doubt, especially your own. And in a time of tumultuous change in the world around us, it is also about consistency and fortitude, and finding ways to get things done.

2022 was the year the number of COVID-19 deaths in the United States passed one million. Inflation reached nearly eight percent. Food, energy and housing costs soared. Markets and investments fluctuated in response to economic uncertainty. Through it all, the staff and volunteers at Benjamin Rose, along with the people we serve, found ways to connect, grow and thrive. More than 150,000 individuals utilized our services. Whether online, over the phone, in person, at home, in our offices, in the offices of one of our many community partners, in Cleveland or across the country, we joined together in our efforts to stand strong.

The services, data and financial statements described in this annual report tell a story of standing strong and standing together to meet the needs of older adult and family caregivers. It is the story of health promotion, housing and homeownership. It is a story of new programs, and renewed commitments to existing ones. It is a story of advocacy and compassion. And it is a story that includes you.

Thank you for your support. And for making this story possible.



Nancy A. Adams

Nancy Adams
Board Chair



Orion H. Bell IV

Orion H. Bell IV
President & CEO



2022 FUNDING SOURCES

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

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

Molina Healthcare

National Community
Reinvestment Coalition

National Institute on Aging

Northeast Ohio
Medical University

Ohio Department of Aging

Ohio Department of
Budget Management

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.

funding

Ohio Department
of Medicaid

Ohio Housing
Finance Agency (OHFA)

Oklahoma Department of
Human Services

Older Americans Act, Title III

Optum

PASSPORT Medicaid Waiver

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



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*
William & Mary F.* Conway
Sue Dempsey
Emily Ann Drake
Mary & Oliver Emerson*
Ruth B. Fiordalis
Barbara & Peter* Galvin
Catherine R. Gerbic*
Thomas* & 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. & Barbara S.* Oldenburg
Henry & Anne* 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*

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DONORS

donors

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

Edwin T. & Mary E.
Hamilton Fund

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

Anonymous
CareSource Foundation
The Cleveland Clinic
The Cleveland Foundation
Enterprise Community Partners
Franklin L. Hartman*
The Norma Witt Jackson Fund
Third Federal Foundation
U.S. Bank Foundation
Westfield Insurance Foundation

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

The Andrews Foundation
Citizens Bank
Eva L. & Joseph M. Bruening
Foundation
The Hankins Foundation
The Higley Fund
Kirk Schmink & Mary Beth
Majoros
National Community
Reinvestment Coalition
Norton-White-Gale Trust
PNC Foundation

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

Orion & Buffy Bell
Dominion Energy Charitable
Foundation
The Huntington Foundation
Huntington National Bank
KeyBank Foundation
Murphy Family Foundation

The Samuel H. & Maria Miller
Foundation

Thatcher Family Fund
Third Federal Savings & Loan
Union Home Mortgage
Foundation
Kathie & Jason Yurgel

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

AARP Ohio State Office
Nancy A. Adams
Anonymous
BNY Mellon
Cleveland Votes
Cuyahoga Arts & Culture
First National Bank
Frances Lennie Snider
Memorial Fund
HW&Co.
JPMorgan Chase & Co.
Herbert F. Leisy*
Eileen McConville
In honor of Nancy A. Adams

National Association of
Nutrition & Aging Services
Program

Sisters of Charity Foundation of
Cleveland

Elizabeth & Frederick Stueber
In honor of Nancy A. Adams

Subaru Share the Love –
Meals on Wheels

Vorys, Sater, Seymour &
Pease LLP

Western Reserve
Area Agency on Aging



DONORS

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

Nancy M. Barnes
In honor of Nancy A. Adams

Audra & Matt Bennett

Michael M. Billnitzer

Kathryn J. Bryan &
Mark A. Aronica
In honor of Nancy A. Adams

Calfee, Halter & Griswold, LLP

CareSource

Chase Bank

City of Cleveland Department
of Aging

Kathryn Balog Coniglio

William & Mary F.* Conway

Edith W. Corning*

Cuyahoga Land Bank

Cynthia H. Dunn & Dale
Cuthbertson
In honor of Nancy A. Adams

David & Inez Myers Foundation

Dedicated Senior Medical
Center

Teresa Dews
In honor of Nancy A. Adams

Sarah M. Dimling
In honor of Nancy A. Adams

Diane Downing &
Thomas D. Corrigan
In honor of Nancy A. Adams

Emily Drake
In honor of Nancy A. Adams

Fifth Third Bank

Ruth Fiordalis
*In memory of
Mary F. Conway**

Robin & David Gunning

Mary Ruth & Joseph Hill

Katherine Barr Hollingsworth &
Adam Hollingsworth
In honor of Nancy A. Adams

David Howard

Humana

Hyster-Yale Materials Handling

Eric & Katie Jensen

JPMorgan Chase Foundation

Kathryn & James Kaesberg
In honor of Nancy A. Adams

Keystone Technology
Consultants

Legal Aid Society

Christine & Richard Lobas

The Lozick Family Foundation

Lori A. Lozier
In honor of Nancy A. Adams

Valerie J. Maczak

Mary & Brian Marita

Jennifer & Dale Markworth
Matz, Blancato & Associates Inc.

Bea McPherson

William A. & Kathryn G. Meyer

Craig & Mary Jo Morford

Myrtle I. Muntz

Michael & Allie Murray

Frank S. Novak

Hermine & David Ostro
In honor of Nancy A. Adams

Edward Richard
In memory of Henry &
Ida* Richard*

Dale M. & Joyce Rothenberger
*In memory of
Alma Rothenberger**

Skylight Financial Group

Studiothink

Thompson Hine LLP

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donors

Belva Denmark Tibbs &
Marc Tibbs
In honor of Nancy A. Adams

Annapurna Valluri &
Anant Madabhuski
In honor of Nancy A. Adams

Amy & Anthony Vegh

Patrons (\$500 - \$999)

Anonymous

David Bass & Katherine Judge
*In honor of Wendy Looman**

Benjamin Rose Institute on Aging

Center for Community Solutions

Dabney Conwell & Deirdre Jones

Geoffrey Dampeer
In memory of G.B. Kennerdell

Muhammad & Farida Ejaz

Leigh & Andrew Fabens

John Farmer

Patricia R. Frutig
In honor of Nancy A. Adams

Thomas C. & Amy Scott Gilchrist
In honor of Nancy A. Adams

Constance Hill-Johnson
In honor of Nancy A. Adams

Barbara Bellin Janovitz &
Lee Janovitz
In honor of Nancy A. Adams

Dwight S. & Patricia Jordan

The Macklin Family Fund

Sue & Dale Omori
In honor of Nancy A. Adams

On Demand Care Corporation

Henry Ott-Hansen

S. Colin G. & Lindsey E. Petry
*In memory of Samuel R. Petry**

PNC Foundation
Matching Gift Program

Alan Porter

Rent-A-Daughter Corp.

Janet Schneider
Shaker Quality
Auto Body

Kathy Smachlo

Marcella Smith

Juanita & Robert Storey

StreamlineCLE

Frederick & Joyce Tavill

United Medicare Ohio

Walmart Foundation

Tiffinae Ware



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/2022donors.

Gifts In Kind

Cleveland State University

Laura Ivec & Brian English

Leonard Eiermann

Claudia S. Fulton

Holden Arboretum

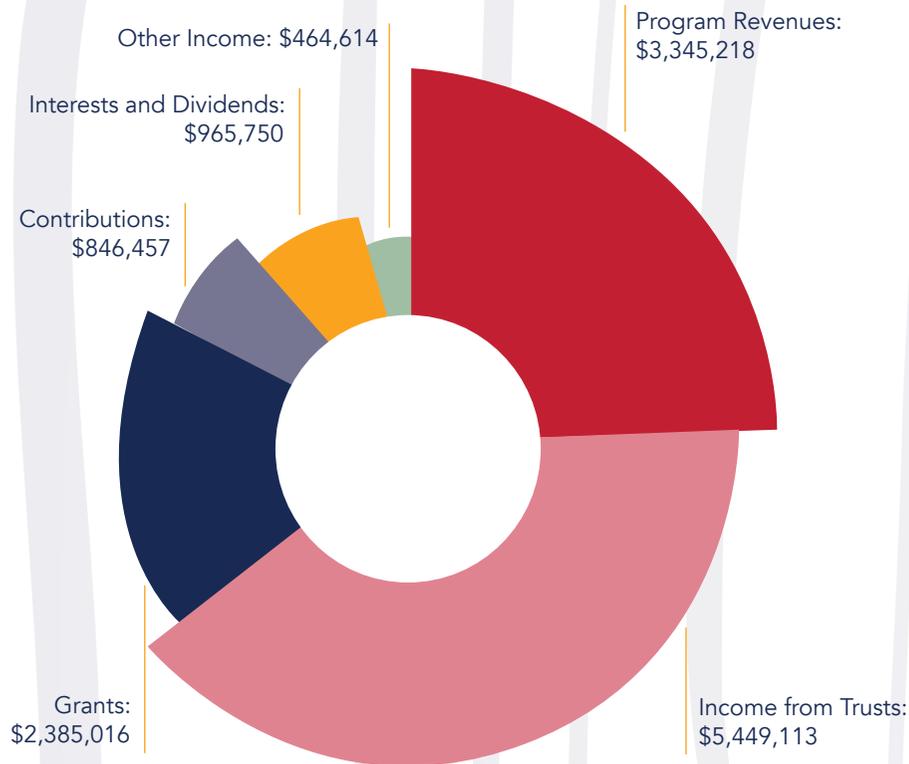
Home Instead Senior Care

Jennifer & Dale Markworth

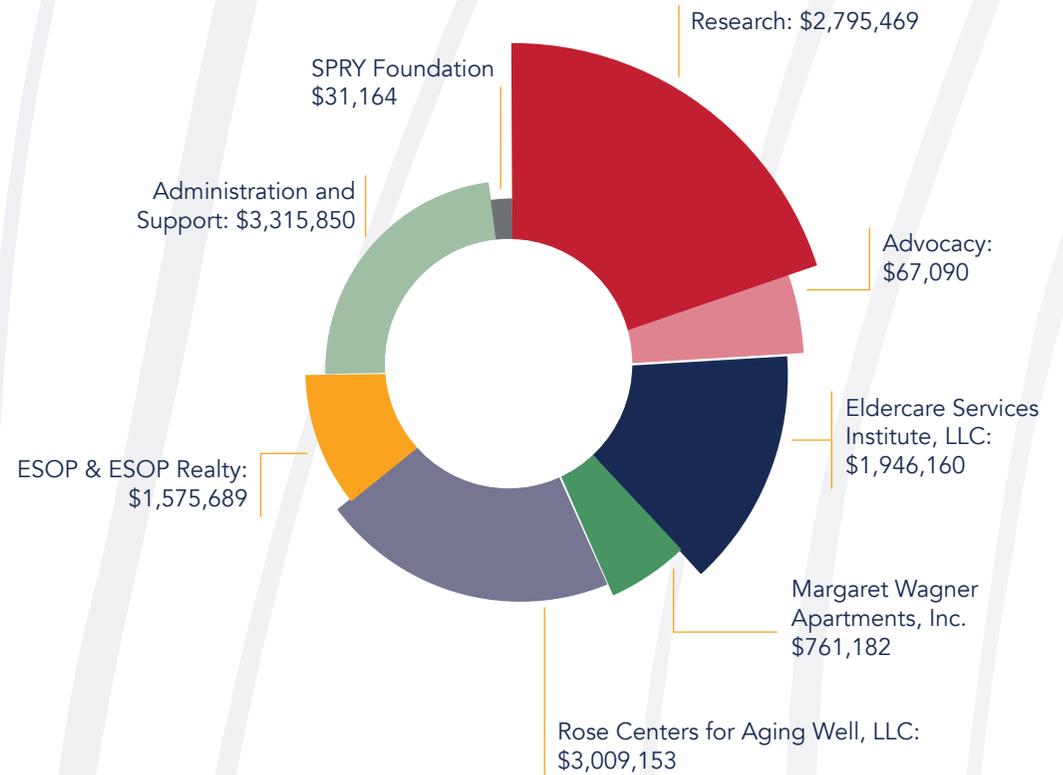
financials

Year ending December 31, 2022

2022 SOURCES OF PROGRAM SUPPORT: \$13,456,168



FINANCIAL STATEMENT



2022 COSTS OF PROGRAM SERVICES: \$13,501,757

OTHER CHANGES IN INCOME

Realized and unrealized loss on investments: **-\$8,832,803**
 Decrease in beneficial interest in charitable perpetual trusts: **-\$22,036,063**
 Net decrease in income: **-\$30,914,455**

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 Barnes

Kathryn Bryan, PhD

Belva Denmark Tibbs

Teresa Dews, MD

Diane Downing

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Katherine B. Hollingsworth

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Kathryn Kaesberg

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Denise M. Kresevic, PhD

Lori A. Lozier

Jennifer I. Markworth

Eileen McConville

Sue Omori

Elizabeth F. Stueber

BENJAMIN ROSE INSTITUTE ON AGING

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and CEO

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Research Scientist, Director of the
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Janice Brennan, CPA
Senior Vice President and CFO

Mary S. Marita, LNHA, MHSA
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 K. 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 Office



205,245 nutritious meals served including **38,780** congregate meals at our seven Rose Center locations.



149,427 home delivered meals to homebound older adults and **17,038** medically tailored meals for older adults with chronic conditions.



13,738 hours of service were provided by **203** volunteers to Benjamin Rose programs and services.



1,665 older adults participated in a variety of Rose Centers for Aging Well programs and services.

highlights



Branches Real Estate helped **73** clients purchase homes totaling over **\$10 million** in sales.



2,413 households participated in housing and financial education workshops and one-to-one counseling.



58 residents resided in our HUD 202 affordable housing.



330 clients received support services from **WeCare** care consultants, **194** of whom were new clients.



2,565 intake referrals logged (calls, emails, referral portals).



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.



HELP US PLANT THE SEED FOR GROWTH,
FOLLOW US ON SOCIAL MEDIA.

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