# MAINTAINING THE SAFETY NET FOR OUR NEEDIEST SENIORS



# THE MCGREGOR COMMITMENT: EXPANDING TO MEET CHANGING NEEDS



THE MCGREGOR FOUNDATION, ESTABLISHED IN 2002, evolved from a history of 125 years of providing senior care.

The Foundation traces its roots to the Home for Aged Women, one of Cleveland's first private nursing homes, built in 1877 by railroad tycoon Amasa Stone and his wife Julia.

In 1930, philanthropist Samuel Mather dedicated the new Amasa Stone House in honor of his industrialist father-in-law to replace the 1877 building. The Amasa Stone House served the Glenville community of Cleveland for nearly 75 years.

Meanwhile, in 1904, Tootie McGregor Terry established The A.M. McGregor Home in East Cleveland to honor her late husband Ambrose, a close associate of John D. Rockefeller. The new organization broke ground for its first building two years later.

The Amasa Stone and McGregor organizations merged in 1987 to form The A.M. McGregor Home, eventually consolidating the care-giving operations on McGregor's 32 acres of woods and meadow on a bluff overlooking East Cleveland.

In 1999, the McGregor Board expanded the organization's mission through creation of a Foundation. Since its formation, the Foundation has contributed some \$7.6 million to 250 programs and institutions – all but a few in Northeast Ohio.

In addition, the Board established The A.M. McGregor Group to provide administrative services and oversee both the McGregor facilities and The McGregor Foundation.

Beyond the Foundation, The A.M. McGregor Group has invested in the expansion of McGregor's senior care footprint.

Beyond the Foundation, The A.M. McGregor Group has invested in the expansion of McGregor's senior care footprint. The East Cleveland campus includes a 148-room skilled nursing facility, The Gardens of McGregor and Amasa Stone. Next to the Gardens is the A.M. McGregor Home, built as a rest home in 1940 to replace the original 1906 building. McGregor renovated the home in 2005 and 2008 into affordable and market rate independent apartments and assisted living.

In 2009, McGregor purchased Overlook House, a 25-bed nursing home atop Cedar Hill near University Circle, from the Christian Science Church. After renovation, this facility reopened as McGregor at Overlook.

And in the summer of 2010, the Centers for Medicare & Medicaid Services (CMS) and the Ohio Department of Aging (ODA) chose the McGregor Group to serve as the local sponsor for the national Program for the All-Inclusive Care for the Elderly (PACE). Known as McGregor PACE, the new organization's mission is to serve frail, low-income seniors, preferably in their homes.

On the East Side of Cuyahoga County, PACE coordinates homecare services through its Center for Senior Independence<sup>®</sup> at the Margaret Wagner House on Euclid Heights Boulevard in Cleveland Heights. On the West Side, the PACE Center is in the new MetroHealth Senior Health & Wellness Center on Pearl Road, formerly Deaconess Hospital.

At McGregor PACE, the McGregor Group is partnering with the nonprofit Senior Independence<sup>®</sup> of Columbus, one of the largest providers of home-based senior care in Ohio. The University Hospitals Department of Family Medicine is also a partner and provides McGregor PACE with medical services.



### LOSING THE BATTLE BUT WINNING THE WAR

DURING THE LAST YEAR, GREATER CLEVELAND LOST THE BATTLE to ensure access to basic human services for all frail and impoverished seniors. The so-called senior safety net broke.

But The McGregor Foundation and other benefactors and direct providers of aging services in Cuyahoga County remain confident of winning the war as we focus more of our resources on restoring capacity.

Statistics suggest that growth in the number of impoverished seniors in our region is accelerating, contributing to the expansion of their needs for basic human services. Steve Wertheim of United Way's helpline 211 First Call for Help reports that calls from seniors increased by 123 percent from 2005 to 2009.

The fact that calls from suburban seniors, specifically, increased by 125 percent suggests that we have more than just an inner city problem. Shelter-related calls, which increased by more than 300 percent during the period, equaled the calls for food needs. Together they were more than 85 percent of total calls.

This unprecedented growth in needs for basic human services has severely strained the infrastructure of providers. In a study commissioned by the Cleveland Council on Older Persons, a McGregor grantee, Julie Jarvis, director of Planning of the Western Reserve Area Agency on Aging, reported that 14 percent of the agencies in Greater Cleveland's aging network advised that they are not meeting the essential needs of clients.

Some 75 percent of these agencies have frozen staff salaries in the face of cutbacks in philanthropic and government funding.

In response to these needs, we at The McGregor Foundation redoubled our focus on strengthening the safety net of basic human services for Northeast Ohio's most vulnerable seniors by distributing \$885,952 in 34 grants.

This relatively modest amount of total grants reflected continued weakness in the investment markets. Our Board attempted to optimize limited funding capacity by applying the insight and expertise gained from McGregor's historical experience and position in the community serving seniors in need.

Our objective of rebuilding basic human services for frail and impoverished seniors in Cuyahoga County involves three strategies: building capacity in the infrastructure of aging services around affordable senior housing, encouraging aging-services workforce development, and improving the quality of life.

The first strategy – to support affordable housing with services – claimed more than 60 percent of total grants. These included continued efforts to expand and enhance our region's stock of affordable senior housing.

Specifically, since 2007 The McGregor Foundation has provided pre-development funding through four community development corporations sponsoring senior housing initiatives: Burten, Bell, Carr; Fairfax Renaissance; Union Miles; and the Famicos Foundation. Designs for two of the projects emerged from the Greater Circle Seniors Design Charrette that The McGregor Foundation produced in April 2009.

Moving these projects past the pre-development stage awaits government financing through which interest rate subsidies will flow to residents in the form of lower rent. Competition for this financing means that such projects typically take three to five years, if not longer, to move from planning into construction. "... taking services to seniors at home makes better use of scarce resources than taking seniors to services in residential care facilities."

Because of the increase of even more urgent needs among aging service providers, the Foundation will probably maintain pre-development funding at the current level until our portfolio of projects moves forward.

A growing evidence base, compiled by researchers such as the Institute for the Future of Aging Services, a McGregor Foundation grantee, suggests that taking services to seniors at home makes better use of scarce resources than taking seniors to services in residential care facilities.

This shift in the paradigm of senior care will, however, require aggressive recruiting and training of workers at all levels, from paraprofessional nursing assistants and service coordinators to geriatric physicians, which is The McGregor Foundation's second strategic focus.

In a related grant, The McGregor Foundation collaborated with The Cleveland Foundation, the City of Cleveland and the National Council on Aging in a pilot, nation-wide program to coordinate service delivery to seniors through individual care planning in Economic Security Service Centers.

Our third strategy acknowledges the breadth and diversity of need for the populations we serve through quality of life grants. For example, we are pleased to report that the Cleveland TOPS Swingband, started in the McGregor Home and featured in our 2008 Annual Report, is thriving.

This ensemble of "Tough Old Pros" continues to delight both old and young audiences in multiple venues with favorites from the 1930s and 1940s.

In 2010, Fairfax Renaissance Development Corporation named The McGregor Foundation as one of two 2009 Corporate Partners of the Year. We are grateful to Executive Director Vickie Johnson and her colleagues for this award, and deeply honored. It validates our proposition that carefully targeted and purposeful grants to high quality partners can make a difference.

This annual report highlights several exceptional programs that represent the variety and richness of our funding commitments. Each of these presents a distinctive approach to improving the lives of seniors in Greater Cleveland.

Once again, on behalf of The McGregor Foundation's Board of Directors and our colleagues at Foundation Management Services, we would like to express our admiration and gratitude for the passion and commitment of the providers of services for seniors in Northeast Ohio who engaged us in their efforts through their grant proposals.

They bear extraordinary testimony to the level of compassion and concern for others that distinguishes our community. They are all heroes of a noble war.





Jane K. Meyer, Chair

Rob Hilton, President and CEO

Jane Fumich, Director of the City of Cleveland Department of Aging

# HELPING LOW-INCOME SENIORS HELP THEMSELVES: THE PIONEERING NATIONAL ECONOMIC SECURITY INITIATIVE OF THE NATIONAL COUNCIL ON AGING

THE NATIONAL COUNCIL ON AGING (NCOA) awarded a partnership among the City of Cleveland and the Cleveland and McGregor Foundations with an innovative opportunity to provide impoverished seniors with the tools to help lift themselves out of poverty.

Known as the Economic Security Initiative, the partnership will sponsor a demonstration program to test providing economic counseling services to lowincome seniors.

NCOA is a nonprofit service and advocacy organization, headquartered in Washington, D.C., that brings together nonprofit organizations, businesses, and government in developing innovations to improve the lives of all older adults, especially those who are vulnerable and disadvantaged.

NCOA launched the multi-city initiative with a \$1 million grant from the Harry and Jeannette Weinberg Foundation. The Cleveland and McGregor Foundations each committed \$45,000 in support in FY 2010 to the City of Cleveland Department of Aging to coordinate the local effort. Since this is a two-year program, the two foundations will continue their commitment in 2011.

The Cleveland grants meet the challenge that NCOA made to other cities: New York, Baltimore, Chicago, Detroit, Los Angeles, Milwaukee, and Tucson. NCOA designates the program in each city as an Economic Security Service Center.

Across the country, this pilot project should help some 4,000 low income

seniors to achieve greater economic security. In Cleveland, 500 seniors will be enrolled in the Initiative.

"With 13 million older adults living near poverty, and unemployment for older workers at an all-time high, people need help getting services and support from a very

fragmented system," said James Firman, President and CEO of NCOA, at the time of the grant.

The Initiative will determine if access to an array of economic services will improve the lives of seniors. In Cleveland, the Department of Aging will draw upon the expertise of various social service providers, including the



"With 13 million older adults living near poverty, and unemployment for older workers at an all-time high, people need help getting services and support from a very fragmented system."



Director Fumich and her staff

Cleveland Department of Consumer Affairs, Consumer Credit Counseling Services, Cleveland Tenants Organization, Legal Aid Society, and United Way First Call for Help.

Among the core services provided are public benefits and employment assistance, foreclosure intervention, financial counseling, and legal help. Most importantly, a case manager will complete a plan tailored to meet the unique economic security needs of each participant.

NCOA is requiring data collection and analysis about the participants to determine the success of the program.

"We believe that if we can help seniors with economic security issues, it will reduce their anxiety and help improve other aspects of their lives," says Jane Fumich, director of the City of Cleveland Department of Aging.





### WHY THE CITY OF CLEVELAND WILL BENEFIT FROM THE ECONOMIC SECURITY INITIATIVE

Some statistics from Jane Fumich, Director of the City of Cleveland Department of Aging:

- Cleveland is one of the poorest cities in America.
- 70,000 residents are 60 years old and older.
- 23 percent of those 65 and older live in poverty.
- 30 percent of the 65-and-older population is between 100 and 199 percent of the poverty line.
- 42 percent of the Medicaid waiver home care clients in the five principal counties of Northeast Ohio live in Cleveland.
- 54 percent of clients receiving home care services through the Cuyahoga County Options Program live in Cleveland.
- 65 percent of Cuyahoga County's grandparents responsible for grandchildren live in Cleveland.

### "SENIOR GUEST HOUSE SAVED MY LIFE. THAT'S WHAT THEY DO!"

WHEN THE SENIOR GUEST HOUSE OPENED in 2004 on the campus of Fairhill Partners, located between Shaker Square and University Circle, it was the first emergency short-term housing site in Ohio for seniors.

This home-like setting provides a safe and comfortable environment for low-income seniors who have been displaced because of a residential crisis, such as fire or structural damage, eviction, social isolation, even loss of income. Some have been victims of fraud.

Collaborating on this special initiative with Fairhill Partners are the Cleveland Department of Aging and the Cuyahoga County Department of Senior & Adult Services, as well as McGregor and various other funders.

The length of stay is one to 90 days and the average is 45 days. The wheelchair-accessible Senior Guest House can accommodate eight residents in semi-private bedrooms. Amenities include a kitchen, three bathrooms, living room, and laundry space. Clothing and toiletries come from private donations.

The facility also provides special assistive technologies for seniors, such as a raised dishwasher and bathroom grab bars.

Golden Age Centers of Cleveland supplies a daily meal, which is supplemented by Fairhill. Volunteers help with cooking and other services.

"Our primary goal for residents, whom we call participants, is relocating them to a proper living space." "Our primary goal for residents, whom we refer to as participants, is relocating them to an independent living space," says Stacey Rokoff, Fairhill Director of Successful Aging Programs. "Our secondary goal is to be sure they have all the resources necessary to maintain their independence.

"That might mean putting them back in their home, once it is livable, perhaps housing them with relatives, or even sending them to a nursing home if personal care is required. Our secondary objective is to teach them self-care skills that help them get access to benefits for which they are eligible, from food stamps to Medicare Part B assistance.

"Everyone comes here in a moment of crisis," adds Rokoff. "We work with social service agencies, the courts and the extended family network to help them get back on their feet."

A successful case is Geraldine B., a 66-year-old Clevelander who lost her home when she lost her job. When the company was sold, she was homeless within two weeks. Because Geraldine had once held a job at Fairhill, she asked to come back, this time as a participant. Since then, she has been re-employed at Fairhill and serves as the house monitor at Senior Guest House.

"Senior Guest House saved my life," Geraldine says. "That's what they do."

Senior Guest House is one of several programs run by Fairhill Partners, whose mission is connecting people to opportunities for lifelong learning, intergenerational relationships and successful aging.

"Without McGregor's help, we could not give the proper attention to these truly needy and desperate seniors," says Rokoff.

Senior Guest House at Fairhill is on property that once was the estate of the Leisy family, which ran a local brewery in the late 19th and early 20th centuries. The original stables, built in 1905, are still used for social activities.

Following the Leisy family, the estate was developed into a U.S. Marine Hospital. In 1953, the State of Ohio turned it into a psychiatric institution. It closed in 1983.

Four years later, with support from the Benjamin Rose Institute and University Hospitals, Fairhill took over the property and began its conversion. The Senior Guest House itself was once a residence for nurses and doctors.

In 1995, the 9.5-acre site was named a Cleveland Historic Landmark. Today, more than 1,200 visitors a month pass through the campus.

Rokoff said Fairhill is hoping to raise funds to renovate two larger buildings for a 26-apartment Kinship Village: intergenerational housing for grandparents and the grandchildren they are raising.

> Geraldine B. with Stacey Rokoff, right, Fairhill Director of Successful Aging Programs, at the Senior Guest House.



# OUR COMMITMENT TO FAIRFAX EARNS THE MCGREGOR FOUNDATION CORPORATE PARTNER OF THE YEAR

LAST YEAR, FAIRFAX RENAISSANCE DEVELOPMENT CORPORATION honored The McGregor Foundation and JPMorgan Chase Foundation as its Corporate Partners of the Year.

We received this prestigious honor because of our commitment to an innovative program initiated by Fairfax known as Intergenerational Housing.

McGregor first funded Fairfax in 2008 with a \$125,000 grant for renovation of the Langston Hughes Community Center and then began our involvement with Intergenerational Housing with a \$50,000 planning grant.

Following this grant, McGregor in 2009 awarded Fairfax a \$40,000 grant to sponsor a national design competition for this project.

McGregor also awarded Fairfax \$10,000 in 2010 for continued planning and made an additional \$60,000 loan for property acquisition and building demolition.

These grants positioned Fairfax to apply for government funding for this undertaking, which will ultimately provide housing for 40 families of grandparents who have legal custody of their grandchildren.

Presently, there are only six similar housing developments nationwide.

None exist in Ohio or the Great Lakes Region.

The project is a mix of two-, three- and four-bedroom town homes designed in clusters. It will be located on Central Avenue between East 80th and East 83rd streets. Construction is expected to begin in 2011.

"McGregor has helped

us pursue our mission to help grandparents "McG and grandchildren," says to Fairfax Director Vickie Eaton Johnson. "Without McGregor, we would not have had a chance to make this pioneering project a reality."



Vickie Johnson, Director of the Fairfax Renaissance Development Corporation

Photo by Rodney L. Brown Photography

"McGregor has helped us pursue our mission to help grandparents and grandchildren."

### HEALTHY HOMES CAN LEAD TO HEALTHIER LIVES

IN RECENT YEARS, the Case Western Reserve University School of Medicine has developed numerous innovative programs, including those that reach out directly to inner city seniors.

Among them is *Healthy Homes*, which is designed to improve the living conditions of older, low income adults by cutting through the red tape to eliminate home hazards as quickly as possible.

With support from The McGregor Foundation and Environmental Health Watch, the novel *Healthy Homes* program supplements the University Hospitals *House Call* program, which McGregor has also supported.

According to Dr. Dorr Dearborn, Chairman of the Department of Environmental Health Sciences of the School of Medicine, housing stock in low-income urban areas can often be dangerous to the health and safety of the elderly.

"By addressing health hazards in the homes of frail elderly, we seek to improve their quality of life and extend their time of independent living," says Dr. Dearborn.

Participants in *Healthy Homes* receive a home hazards assessment and, if appropriate, professionally installed low-cost additions. These include handrails,



smoke alarms, and remote lights for calling attention to possible household perils.

"This unique, multi-disciplinary initiative hits on all of

the Foundation's focus areas," says Rob Hilton. "It incorporates safety, quality of life enhancement, and training of medical students to become sensitized to the needs of low-income seniors."



Helping seniors to improve living conditions through Healthy Homes can add to their quality of life in many ways.



"By addressing health hazards in the homes of frail elderly, we seek to improve their quality of life and extend their time of independent living."

### MCGREGOR CHOSEN TO RUN PACE IN GREATER CLEVELAND



THE CENTERS FOR MEDICARE & MEDICAID SERVICES and the Ohio Department of Aging have chosen The A.M. McGregor Group to sponsor the local Program for the All-Inclusive Care for the Elderly (PACE). The new organization will be known as McGregor PACE.

This special program, which enables frail and impoverished seniors to age at home rather than in costlier residential care facilities, will serve participants through McGregor PACE Centers for Senior Independence at the Margaret Wagner House in Cleveland Heights and the MetroHealth Senior Health & Wellness Center on Cleveland's West Side.

McGregor PACE represents a partnership among the McGregor Group, University Hospitals as the provider of medical services, and Columbus-based Senior Independence to oversee homecare. Senior Independence is one of the largest providers of home-based senior care in Ohio.

"Homecare is critical to the growing number of frail and impoverished seniors in Greater Cleveland who are our highest priority," says Rob Hilton. "PACE is extraordinarily important, because it offers high-quality care while making the most efficient use of scarce government funding."

According to Hilton, PACE has 200 participants in Cuyahoga County, a fraction of the number who qualify. "We hope to double this number in the next year," he says.

Tangi McCoy, Chief Operating Officer of the McGregor Home, will move to McGregor PACE as President and Chief Executive Officer.

The PACE model grew out of a pioneering, community-based senior healthcare program in San Francisco in the early 1970s. The Centers for Medicare & Medicaid Services now oversee 72 PACE centers in 30 states. Ohio has only two PACE programs: McGregor PACE and Tri-health in Cincinnati. Both are administered by the Ohio Department of Aging.

To qualify for PACE, participants must be eligible for nursing facility admission, yet capable of remaining in their homes with proper care. PACE commits to providing comprehensive care for life if the participant agrees to receive required care solely through PACE. Buses bring enrollees to the PACE centers for medical attention, as well as occupational and recreational therapy. However, caregiver visits to participants at home to address health and personal needs is PACE's priority emphasis.

Only seven percent of the program participants nationally reside in nursing homes because of the personal attention provided by PACE caregivers. This results in a large taxpayer cost saving.

University Hospitals will build on the strength of its *House Call* program, launched in 2004 with assistance from The McGregor Foundation. This program helps homebound seniors beset with heart disease, diabetes, arthritis, and mobility, memory, and other health-related problems.

Dr. Peter DeGolia, Director, Center for Geriatric Medicine, University Hospitals Case Medical Center, will serve as the McGregor PACE Medical Director. "Working closely with McGregor, the University Hospitals medical staff will help these vulnerable seniors to continue to live comfortably in the community with supportive services," says Dr. DeGolia.

> "Homecare is critical to the growing number of frail and impoverished seniors in Greater Cleveland who are our highest priority."

"We look forward to working with McGregor in extending much-needed home- and community-based care to the needy PACE seniors," adds Nancy King, President of Senior Independence (SI), which provides services to more than 75,000 seniors in 42 Ohio counties.

SI's parent company, Ohio Presbyterian Retirement Services, also owns and operates Breckenridge Village in Willoughby Hills and Rockynol Retirement Communities in Akron.

### MCGREGOR TO THE RESCUE IN EAST CLEVELAND

THE CITY OF EAST CLEVELAND, McGregor's home for the last century, has become one of the most impoverished communities in America. Moreover, the city government has struggled in recent years to maintain adequate municipal services.

For these reasons, McGregor responded to the City's request for assistance with a grant for the purchase and equipping of a 2003 International/Osage ambulance to replace a 1997 GMC/Marque vehicle that was no longer reliable.

The "new" ambulance had run up fewer than 40,000 miles (very low for an ambulance) and was in excellent condition. A comparable new ambulance would have cost over \$150,000, which was out of the question for East Cleveland.

Fire Chief Douglas Zook explains: "At the time of the grant, we had only two ambulances operating, both in heavy front-line service. We had no reserve vehicle if one of the others was down for maintenance or repair. The acquisition has been a Godsend, allowing us to rotate all our ambulances in and out of service, thus improving maintenance and extending operational life.

"Between October 2009 and October 2010, the McGregor vehicle had responded to more than 1,500 emergency medical

runs and transported more than a thousand patients to the hospital.

"Has this ambulance saved lives? Unequivocally, yes!" "The acquisition has been a Godsend, allowing us to rotate all our ambulances in and out of service, thus improving maintenance and extending operational life."



Fire Department ambulance team with the new emergency medical vehicle from The McGregor Foundation. Inset: Chief Douglas Zook with Mayor Gary Norton



### THE WAY WE WERE

MEDICAL STUDIES IN RECENT YEARS have shown that reliving memories benefits seniors, including strengthening their brainpower and even reducing depression and pain. In fact, commercial online tools are increasingly available to help seniors create autobiographies.

The Living through Legacies Project at Case Western Reserve University's Mandel School of Applied Social Sciences enables undergraduate and graduate students to record the memories of seniors. Six are from Cleveland's Fairfax neighborhood and six from The A.M. McGregor Home.

"Elders have a lot to share with young people and, in turn, their lives are enhanced by the experience of talking about their past," says Sharon Milligan, the CWRU Associate Dean for Academic Affairs at the Mandel School.

So successful was the project that CWRU President Barbara R. Snyder addressed the participants and students at a campus reception. "You could see the joy on the faces of everyone involved," says Milligan.

Highlight of the Legacies project was the individual, 32-page to 100-page hardbound Memory Books with photos (see page 15), which the students presented to the seniors they interviewed.

The project was the brainstorm of 23-year-old entrepreneur David Harris, who received his graduate degree in 2010 from the Mandel School.

Below, left to right: Andrea Peters, Program Social Worker, Senior Outreach Services; Barbara R. Snyder, President, Case Western Reserve University; David Harris, Founder, Living through Legacies Project; Vickie Eaton Johnson, Executive Director, Fairfax Renaissance Development Corporation; Delores Lynch, Executive Director, Senior Outreach Services; Alisha Memaran, Research Development Coordinator, Fairfax Renaissance Development Corporation



Through his start-up company, Tec4Life, Harris had previously managed a similar undertaking for a senior center in Wadsworth, his hometown.

"Because of the Wadsworth experience, I knew the CWRU and Mandel School students would find the McGregor-funded effort just as rewarding," says Harris, who intends to develop his business by pursuing similar endeavors that focus on uniting generations through technology. Irene Dugovics, center, with David Harris and biographer Allison Early





Sarah Mae Cotton, front left, and friends



A Long and Wonderful Life The Legacy of Irene Dugovics Living a Christian Life

The Legacy of Sarah Mae Cotton

"Elders have a lot to share with young people and, in turn, their lives are enhanced by the experience of talking about their past."

### THE McGREGOR FOUNDATION

#### DISTRIBUTIONS APPROVED FY 2010

#### 34 GRANTS TOTALING \$885,952

<b>Alta House</b> Comprehensive Senior Service program	\$10,000		
<b>American Red Cross</b> Smoke alarms and fire safety education for low-income seniors	\$20,000		
Boy Scouts of America Greater Cleveland Council			
Yard Charge project, in collaboration with the City of Cleveland Department of Aging, providing seniors with free yard maintenance	\$7,315		
<b>Burten, Bell, Carr Development, Inc.</b> Construction of the Beacon Community Room	\$22,500		
<b>Burten, Bell, Carr Development, Inc.</b> The Senior Housing Initiative	\$49,000		
<b>Business Volunteers Unlimited</b> Capacity-building consultations for nonprofit organizations	\$5,000		
<b>Case Western Reserve University</b> Living Through Legacies, a student project to produce memoirs of seniors with mild cognitive impairments in Cleveland and East Cleveland	\$10,000		
<b>Case Western Reserve University</b> Healthy Homes, a program to improve living conditions of older adults	\$35,100		
<b>The Center for Community Solutions</b> The Council on Older Persons	\$17,500		
<b>City of Cleveland Department of Aging</b> To implement the National Council on Aging Economic Security Service Centers	\$45,000		

<b>City of East Cleveland</b> Purchase of an EMS ambulance	\$50,000
Cleveland TOPS Swingband Foundation Senior outreach programming	\$18,000
<b>Cuyahoga Community College Foundation</b> Equipment for the Home Health Aide Training 1	<b>\$20,257</b> Program
<b>Eliza Bryant Village</b> Programming at the Amasa B. Ford Lodge	\$40,000
Fairfax Renaissance Development Corporati The Grandparent Housing Project	ion \$10,000
Fairhill Partners Senior Guest House	\$20,000
<b>Famicos Foundation</b> Maintenance of the Amasa Stone Building and for predevelopment funds	\$119,000
Foundation Center Operating support	\$2,750
<b>Grantmakers In Aging</b> Program support	\$20,000
<b>ideastream</b> In depth coverage of aging issues	\$25,000
<b>Jennings Center</b> Staff training for end of life care	\$22,400
<b>Jennings Center</b> Evaluation of the REACH project, a long term co workforce development initiative	<b>\$30,000</b> are
<b>The Legal Aid Society of Cleveland</b> The Pro Bono Elder Law Project	\$30,000

)00	<b>Lutheran Metropolitan Ministry</b> Guardianship services for the elderly in Cuyahoga County	\$25,000
000	<b>Murtis Taylor Human Services System</b> Senior transportation	\$6,500
257	<b>Ohio Grantmakers Forum</b> Membership	\$2,230
000	<b>Schnurmann House</b> Community nutrition and transportation program	\$15,000
)00	Senior Citizen Resources, Inc. Senior Transportation program	\$25,000
000	<b>Senior Outreach Services Inc.</b> Capacity building	\$32,400
750	<b>Towards Employment</b> Achieve, a job retention program for long-term care direct care workers	\$10,000
)00	<b>Union Miles Development Corporation</b> Senior housing complex	\$55,000
)00	<b>University Hospitals Health System</b> Geriatric and transitional care education of long-term care staff, medical students, residents, and other clinicians	\$51,000
100	<b>University Settlement, Inc.</b> Wellness programming for seniors	\$20,000
)00	West Side Community House Healthy Bodies Healthy Minds, a project to assist low-income seniors on Cleveland's West Side with physical and mental health issue	<b>\$15,000</b>

# THE McGREGOR FOUNDATION

#### STATEMENTS OF REVENUE, EXPENSES AND NET ASSETS

#### YEARS ENDED APRIL 30, 2010 AND 2009

	2010	2009
	UNRESTRICTED	UNRESTRICTED
REVENUE:		
NET INTEREST AND DIVIDENDS	\$ 460,689	\$ 450,738
EXPENSES:		
GRANTS AND CONTRIBUTIONS GRANTS ADMINISTRATION	739,722 101,457	733,290 151,868
GENERAL AND ADMINISTRATIVE:		
MANAGEMENT FEES, AFFILIATE ADVERTISING AND PROMOTIONS CONFERENCES AND CONVENTIONS PROFESSIONAL SERVICES OFFICE AND MISCELLANEOUS	$115,500 \\ 48,829 \\ 2,615 \\ 12,000$	115,500 55,366 2,235 34,581 304
TOTAL EXPENSES	1,020,123	1,093,144
LOSS FROM OPERATIONS	(559,434)	(642,406)
OTHER INCOME; NET REALIZED GAINS ON INVESTMENTS	(618,254)	(2,056,906)
REVENUE IN EXCESS OF EXPENSES (EXPENSES IN EXCESS OF REVENUE)	(1,177,688)	(2,699,312)
CHANGE IN NET UNREALIZED LOSSES ON INVESTMENTS	4,283,657	(4,945,237)
INCREASE (DECREASE) IN NET ASSETS	3,105,969	(7,644,549)
NET ASSETS, BEGINNING	16,874,440	24,518,989
NET ASSETS, ENDING	\$19,980,409	\$16,874,440

#### MISSION AND GUIDELINES OF THE MCGREGOR FOUNDATION

The McGregor Foundation favors grant requests that meet the needs of the economically disadvantaged and frail elderly, primarily in Cuyahoga County, Ohio, in the following priority areas:

- Home- and community-based care, particularly programs such as affordable housing with services.
- Workforce development, especially related to providing ongoing educational and training opportunities for workers engaged in direct contact with, or providing services for, seniors in home- and community-based settings.
- Total quality-of-life programming for seniors in all settings.



Through these three priority areas, the Foundation will emphasize the importance of cooperation among agencies and/or opportunities for collaboration among funders.

The Foundation will consider requests for capital projects only to the extent that the improvements are critical and necessary to program delivery. Because of The A.M. McGregor Group's strong commitment to residential care through The A.M. McGregor Home, the Foundation discourages capital requests from other residential long-term care providers.

The Foundation does not fund scholarships, research unrelated to the priority areas, annual funds, symposia, or endowments. No grants are awarded to individuals.

Application deadlines are February 1 and September 1.

Send applications to Susan O. Althans, The McGregor Foundation c/o Foundation Management Services, 1422 Euclid Avenue, Suite 627, Cleveland, OH 44115; Tel: 216.621.2901; salthans@fmscleveland.com.

Annual Report Writing and Design • Whelan Communications New Photography by Bill Rieter





#### **Our Exceptional Cover Photo**

The cover photo for our 2010 Annual Report was taken on a fall day by Mary McNamara, Project Coordinator in the Cleveland Department of Aging, while making a home visit with city Building and Housing inspectors. The kindly lady attempted

to flatten a broken porch floor board for her visitors. This poignant photo in many ways portrays the story of elderly persons living in poverty in Cleveland. Poverty precludes neither pride in place and country nor personal grace.

The Department of Aging, as profiled in this Report, works to help eliminate these hardships through services and assistance to seniors in need.



Mary McNamara

#### BOARD OF DIRECTORS: JANE K. MEYER, CHAIR



SERVING SENIORS IN NEED AND THOSE WHO CARE FOR THEM IN NORTHEAST OHIO

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