



## TO OUR STAKEHOLDERS

Stephanie Chedid President & CEO Luther Manor



Another year, another opportunity to share God's love. In 2018, Luther Manor staff and volunteers continued their important, compassionate work of enriching the lives of older adults. Together, we served over 500 residents and touched families and the community in meaningful ways. Marking the second year of our three-year strategic plan, we experienced many changes several of which are noted in this year's report. Our commitment and dedication resulted in improved resident satisfaction and employee engagement combined with the continuation of providing charity care for those among us who outlive their ability to cover the cost of their care.

For the first time ever, Luther Manor achieved certification as a Great Place to Work. We celebrated our everyday efforts that make a difference for residents and for one another. In the fall of 2018, we rolled out a staff-driven recognition program -Mission Possible. The program honors those among us who go above and beyond to serve our mission. I invite you to view videos of all our honorees online at luthermanor. org/missionpossible to get a glimpse of what makes Luther Manor so remarkable.

Thanks to generous grants and years of prudent saving, Luther Manor saw many renovations both inside where residents live and gather, as well as outside across our beautiful landscape. Our residents often remind us that this is their home. They love the comfort and beauty of it enriched by their community of friends and wonderful care.

Legacy gifts to the Luther Manor Foundation in 2018 reached nearly \$1.5 million. We are blessed by the generosity and commitment to Luther Manor across the generations. We also saw our donor base grow in 2018 as we reached new donors and rekindled the generosity of past donors. The Foundation continues to play a critical role in our ability to provide charity care and reinvest in the organization for the future. Together, we are leading the way in abundant living for all who trust us to care grounded in our mission to share God's love by enriching the lives of older adults.

Thank you to our staff, volunteers, residents, and donors who make Luther Manor's community so special and meaninaful, and to the many families who trust us to care. It is an honor and a privilege to serve in God's name.

Stephane Chedial

# **SHARING** GOD'S LOVE



"Thinking back to my youth, I do not recall anyone mentioning to me that my life could be a legacy of lasting value. Fortunately, somewhere along the way, I learned that what we do for ourselves dies with us while what we do for others lives on as part of our legacy. A perfect example of leaving a positive legacy is the support we can give to the generation that preceded us such as the wonderful residents of Luther Manor. Many of these residents have a legacy of caring for others but are now in need of financial support for their own care. The support we give to them is certainly part of our legacy — and that of our Lord Jesus who works through us to do good for others. Thank you for supporting Luther Manor residents as part of your legacy."

> Tom Buck Foundation Board Chair



118

families served with hospice care

services

147.50

dollars raised by Santa's Brunch Bake Sale to purchase Christmas gifts for area children

1,575

dollars donated by 25 Luther Manor veterans to the Milwaukee Soldiers Home Preservation



3,910.14

dollars raised by Holiday Bazaar to provide campuswide Life Enrichment events

40,000

dollars challenge grant from Siebert Lutheran for Faith & Education Center renovation

146,303

dollars challenge grant pledged from Luther Manor Foundation board for Faith & Education center renovation

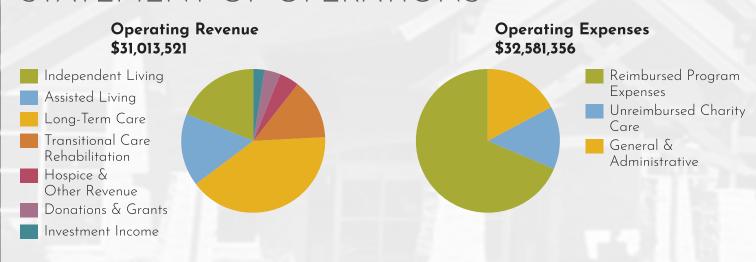
31

veteran residents remembered at 2

## LUTHER MANOR FINANCIAL REPORT

| BALANCE SHEET                    | As of 12/31/2018 |
|----------------------------------|------------------|
| ASSETS                           |                  |
| Cash and Investments             | \$21,876,995     |
| Other Current Assets             | 2,727,488        |
| Property and Equipment           | 20,442,960       |
| Total Assets                     | \$45,047,443     |
| LIABILITIES AND NET ASSETS       |                  |
| Current Liabilities              | \$4,566,827      |
| Entrance Fees                    | 8,524,824        |
| Long-Term Debt                   | 11,918,651       |
| Total Liabilities                | \$25,010,302     |
| Total Net Assets                 | \$20,037,141     |
| Total Liabilities and Net Assets | \$45,047,443     |
|                                  |                  |

## STATEMENT OF OPERATIONS

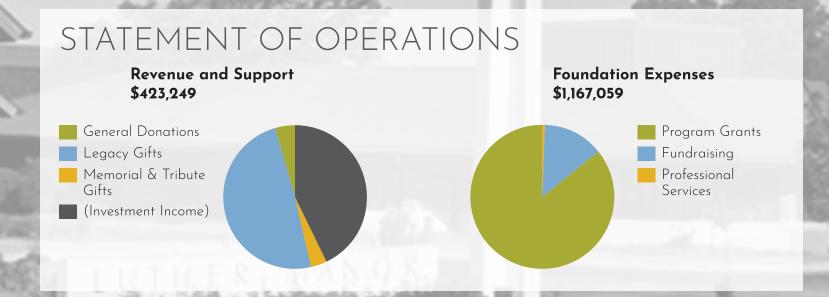


## FOUNDATION FINANCIAL REPORT

It is our goal that every resident can call Luther Manor home for the remainder of their lives. The Luther Manor Foundation was established in 1985 to support that commitment by helping provide for residents whose resources no longer meet the cost of their care.

More and more, our residents are living longer and for some that means outliving their own financial resources. The Luther Manor Foundation, through grants to Luther Manor, helps to cover the cost of care so no resident will be asked to leave because of an inability to pay. Through their generous support of the Luther Manor Foundation, donors help provide peace of mind to all residents that, at Luther Manor, they are home.

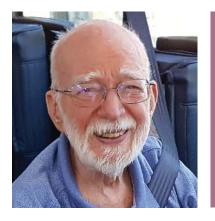
| BALANCE SHEET                    | As of 12/31/2018 |
|----------------------------------|------------------|
| ASSETS                           |                  |
| Cash and Investments             | \$16,171,348     |
| Other Current Assets             | 14,544           |
| Total Assets                     | \$16,185,892     |
| LIABILITIES AND NET ASSETS       |                  |
| Total Liabilities                | \$132,147        |
| Total Net Assets                 | \$16,053,745     |
| Total Liabilities and Net Assets | \$16,185,892     |



# ENRICHING LIVES

16,917
dollars donated by residents to endof-year employee appreciation gift

8,544
Life Enrichment activity hours



Milwaukee
Choristers
performed in
2 pre-concerts
onsite

"When we were growing up during the Depression years in a small community, we knew our neighbors as friends that we had social times with, helped each other with projects and rejoiced with good news as well as shared sorrows with bad news. Neighbors became friends as close as family. When we chose to live at Luther Manor, we discovered that we had moved into a loving, caring small community with so many of the same attributes we had known as we were growing up. We became friends as close as family. We shared joys and sorrows as we said farewell to friends. We shared many friendships in small groups and enjoyed good times together. We found our new home."



Harvin & Mary Ann Abrahamson Residents & Donors

1,106

total residents & participants cared for



43,703

engagements with Luther Manor Facebook page

362,561

hours of nursing care provided



Love Lights donors

234

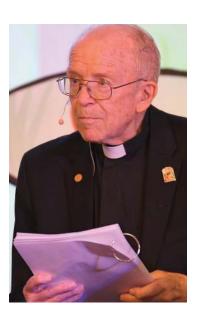


grant dollars from Wisconsin Department of Health Services via Civil Money Penalties to establish a new Skilled Nursing aromatherapy program



179,287

dollars awarded by the City of Wauwatosa in a Community Development Block Grant



46,703
visitors to Luther
Manor website

630 Laugh & Learn attendees

429
full & part-time employees

**771,044** total employee

hours

"Luther Manor is a community where we work collaboratively to create an abundant environment for residents, their families and our staff. Enhanced by volunteers, donors and our board of directors, we are drawn by the prospect of helping to make a difference for our seniors. The results of those efforts are humbling and demonstrate the very good things that occur when well meaning folks come together to make Luther Manor not just a place to reside, but a home inspired by God's love and goodness."



**Tim Schoewe**ULPA Board Chair

"It's been a real honor to serve the mission of the Foundation and use that position to try to continually enrich the lives and experience for the residents at Luther Manor. I'm proud to work together with the Board members, who are dedicated and bright individuals, along with the leadership of Luther Manor to ensure the future serves the mission of the organization, the residents and, more than anything, God."



Jim Jung
Foundation Board Member

1,858,282

dollars in contributions to ULPA and Luther Manor Foundation 1,676

gifts made by 848 donors, including 263 new donors 1,463,030

dollars in matured bequests received by Luther Manor Foundation

flower bulbs donated by Gene Howard, planted by MATC volunteers



29,830 total hours

volunteered

379 total

new volunteers

336,970 meals served in 6 dining venues



4,640,795

dollars of unreimbursed charity care

## 2018 LUTHER MANOR **DONOR RECOGNITION SOCIETY**

The Donor Recognition Society celebrates individuals, businesses and foundations who count Luther Manor and the Luther Manor Foundation among their favorite charitable organizations. Luther Manor welcomes membership to one of the following donor circles based on cumulative giving for one calendar year.

> Benefactor's Circle - \$10,000 or more President's Circle - \$1.000 to \$9.999 • Founder's Circle - \$500 to \$999 Sustainer's Circle - \$100 to \$499 • Friend's Circle - \$1 to \$99

#### **BENEFACTOR'S** CIRCLE

Frederick Amerell +

Marilyn Bub **†** 

Den of Antiquity Resale Shop

**ELCA** Foundation

Ruel Fessenbecker +

Gwenda French Endowment Fund ELCA

Inaa Harwick

Marjorie Jothen

Richard & Geralyn

Koehler

Richard Koehler Trust

Donald + & Eunice + Koehler

Catherine Koester **†** 

Martin H. Pannina Family Trust

Glenn + & Lois + Port

#### **PRESIDENT'S** CIRCLE

Anonymous (5)

Harvin & Mary Ann Abrahamson

Advent Lutheran Church

American Express Employee Giving Program

American Funds

American Funds / Directed by Nancy Kavasch

Martha Andeen

Anderson Family Foundation

Nancy Becher & Miloudi Elafess

Lindsey & Tray Black

BMO Harris Bank

Stephanie Chedid

Thomas & Joyce Christie

Cleary Gull Advisors Inc. A Johnson Financial Group Co.

Thomas De Buhr

**ELCA** Foundation

Faith Lutheran Church

Fox Point Lutheran Church

Greater Milwaukee Foundation's Flomar Thanksaivina Fund

Ruth Hart Estate

Paul Heck

Betty Heibler **†** 

Holy Cross Lutheran Church -Menomonee Falls

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KAYCEE Charitable Trust

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Services, Inc.

Bonnie Mortag

Lillian Love

Dale & Dollie Kirchner

Home & Cremation

Keough

David & Susan Keller John & Doris Keller

Aurora Health Care

Richard & Shirley Ann Behrendt

Coleen Marshall

Janice & Raymond Perry Community Fund, Inc.

PNC Bank

Steven Poppert

PRN Uniforms Renaissance Charitable Foundation / William

Schulz Rev. Jack Trethewey +

Timothy & Rev. Margaret Schoewe

Schwab Charitable Norman & Joanne Seeger

Shepherd of the Hills Lutheran Church

John & Karen Silseth Silseth Family Charitable Fund

St. Matthew's Lutheran Church

Stimac Living Trust

Stu's Flooring Symbria Rehab Inc

T. Rowe Price Thrivent Choice

Program

Unity Church Vanguard

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Helen Chang

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Direct Supply -Michelle Sievert

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JP Morgan Judy Judd

James & Abby Jung

Constance Klina Joyce Koenitzer

Stanley & Kathleen Krueger

David LaCroix

Marsh & McLennan Agency

Northwestern Mutual Foundation Volunteer Support Program

Paratech Ambulance Service

Prince of Peace Lutheran Church -Milwaukee

William Pickerina & Joy Tapper

PRN Uniforms

Redemption Lutheran Church - Milwaukee

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#### **DONOR RECOGNITION SOCIETY** continued

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leffrev & Kathleen

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Czarniak

Nancy Dewey

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Karen Duke

James Thunes Bonnie Vick Arlene Watson

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Dorothy Anderson Kevin & Mary Jo

Anderson

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James Baumgartner

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Lucille Johnson

Marcy Jordan

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lane Kassens

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Mary Ellen Kiesner

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Curtis & Constance

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Frank

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## **DONOR RECOGNITION SOCIETY** continued

Horner

Hoth

Hughes

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Francine John

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Sara Franwick Nancy Hahn L. Sean & Cynthia Dwavne & Carole Deidre Hajigeorgiou Freed Randy & Kathy John & Deborah Carol Galbrovik Hamer Susan Hubbard Nancy Ganuna Ken & Janet Hansen William & Mary Ronald & Mary Gawelski Allen Hardrick Immanuel Myra Gehrke Robert & Debra Harry II Gene & Barb Steve Jacobi Keith & Julie Geiger Hartman Deborah Jacobs Maxine Gerken Arlene Hastings Sandra Jacques Rev. Laura Gerstl-Beukema Beth Hebbe Greg & Kathy Joan Gildner Jo Ann Hegarty William & Mary Ann Deb Heilman Goodman Bernice & Marcella Carol Johnson Michael + & Heimerl Elinor Goodwin Mary Johnson Barb Helling Kevin & Laura Prentiss Johnson Robert Helm Goralski Sherry Jones Anna & Rebecca Ann Gordon Herbert Morrison Patricia Jung JoAnn Gosetti Linda Herkert Sue Jurack Mary Ann Angela Hexom Dennis & Karen Grabmeier Thomas & Doreen Steven & Margaret Hickey Peter & Judith Grabow Gary & Dorothy Debra Gracyalny Mary Kanavas Hintz Gregory Graeme Jeffrey & Deborah Marlene Roberta Graf Hoeft Cheryl Grandlund Terry & Kathryn Jane Karis Hoeppner Michael & Lillian Karkoski Catherine Graves James & Patricia Hans Karkow Hoffman Richard Greene Carolyn Karl Henry & Mary Michael & Jule David & Sharon Hofmann Groh Mary Hofmann Ruth Groh Barbara Kehoss Kenneth Holley Carol Gryga Kentopp Trust Earline Hollub Jeffrey & Mary Shirley Keranen Beth Gubbins Charlotte Honeck John & Jeanette Lorraine Guenther Audrey Hopkins Mike & Marilyn Gladys Hoppe Susan Kessler Hagerman Robert & Kathleen Mark & Wendy Horkheimei Sharon Key Haglin Donna Kindt

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Loppnow

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Martinson

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Ronald Semmann

Schwanke

Jo Scott

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Marge Shantz

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Spletzer

Spletzer

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Simpson

Marcia Skarie

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| Jean Novotny               | David & Jean                  |
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| Sharon Odahl               | Dan Roepke                    |
| O'Donnell South            | Joyce Rohde                   |
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| Olanie                     | Karyl Rosenberg               |
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Jean Weber

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Eileen White

Paul & Patricia

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Umhoefer

## 2018 LIFELONG CIRCLE

The Lifelong Circle was established is recognition of individuals, businesses, congregations and foundations ort of Luther Manor exceeds r their continued support of our

| journey of faith and community.                  |   |  |  |
|--|---|--|--|
| Anonymous (3) Advent Lutheran Church - Cedarburg | Den of Antiquity<br>Resale Shop<br>Derse Family<br>Foundation |  |  |
| Frederick  | Ed Weber, Inc   |  |  |
| Amerell <b>†</b>                                 | ELCA Foundation   |  |  |
| Martha Andeen                                    | Faith Lutheran  |  |  |
| David & Carol                                    | Church -  |  |  |
| Anderson   | Cedarburg   |  |  |
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| Foundation                                       | Ruel  |  |  |
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| Lutheran Church                                  | Fox Point Lutheran  |  |  |
| Foundation                                       | Church - Fox Point  |  |  |
| Nancy Becher &                                   | Gwenda French   |  |  |
| Miloudi Elafess                                  | Endowment   |  |  |
| Richard & Shirley                                | Fund - ELCA   |  |  |
| Ann Behrendt                                     | Friends of Luther   |  |  |
| David Beinlich                                   | Manor   |  |  |
| Gordon Bell Trust                                | Rev. Ronald   |  |  |
| Janet Beltman                                    | Froehlich   |  |  |
| Brookdale<br>Foundation                          | Scott & Lyn Geboy Luther & Lorraine Graef                     |  |  |
| Dorothy Brosin<br>Marilyn Bub <b>†</b>           | Greater Milwaukee Foundation                                  |  |  |
| Calvary Lutheran                                 | Greater Milwaukee   |  |  |
| Church -   | Foundation's  |  |  |
| Brookfield                                       | Flomar  |  |  |
| Capitol Drive                                    | Thanksgiving  |  |  |
| Lutheran Church                                  | Fund  |  |  |
| - Milwaukee                                      | Ingeborg (Inga)   |  |  |
| Thomas & Joyce<br>Christie                       | Harwick Paul Heck   |  |  |
| Jean Collins                                     | Betty Heibler <b>†</b>  |  |  |
| Mary Alice Dean                                  | Joyce Heinrich  |  |  |

| ose lifetime sup<br>rney of faith an  | port of Luther Mar<br>d community.  |
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| rney of faith an onymous (3) vent Lutheran Church - Cedarburg derick Amerell † urtha Andeen vid & Carol Anderson Family oundation len Bader oundation, Inc. | Den of Antiquity Resale Shop  Derse Family Foundation  Ed Weber, Inc  ELCA Foundation  Faith Lutheran Church - Cedarburg  Audrey Falk  Ruel Fessenbecker †  Firstar Milwaukee       |
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| oundation rothy Brosin urilyn Bub † Ivary Lutheran Church - brookfield pitol Drive utheran Church Milwaukee pmas & Joyce Christie n Collins ury Alice Dean  | Luther & Lorraine Graef  Greater Milwaukee Foundation  Greater Milwaukee Foundation's Flomar Thanksgiving Fund  Ingeborg (Inga) Harwick  Paul Heck  Betty Heibler †  Joyce Heinrich |
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| nity.                    | TOT CACCOGG QT  |
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| iquity<br>hop            | Evan & Marion<br>Helfaer Fdn.                           |
| ily<br>on                | Helwig Carbon<br>Products Inc.                          |
| Inc                      | Holy Cross  |
| ndation                  | Lutheran Chur<br>– Menomonee                            |
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| ecker <b>†</b><br>vaukee | Hunt Frieda &<br>William Hunt<br>Memorial Trus          |
| on                       | Marjorie Jothen   |
| nty                      | Judy Judd   |
| omi<br>on                | David & Susan<br>Keller                                 |
| itheran<br>-ox Point     | John & Doris Kel  |
| rench<br>ent             | Dale & Dollie<br>Kirchner                               |
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| on's<br>ving             | Sr. Rose Kroeger<br>Stanley & Kathle                    |
| Inga)                    | Krueger<br>Jack & Mary                                  |
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| & Mary   | Church -   |
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| R. Thomas<br>McConnell   | Na<br>Ste            |
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| Mt. Carmel<br>Lutheran Church<br>- Milwaukee                       | Isal<br>Ge           |
| Mt. Zion Lutheran<br>Church <i>-</i>                               | Rot                  |

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The Luther Manor Heritage Partner Society recognizes faithful donors who include Luther Manor's ministry in their charitable estate planning, ensuring that Luther Manor's compassionate care and service for God's older adults continues. Examples of such charitable estate planning include remembering Luther Manor in your will; obtaining a charitable gift annuity that names Luther Manor as the ultimate beneficiary; making provisions for Luther Manor in a trust agreement; naming Luther Manor as your life insurance beneficiary or naming Luther Manor as a beneficiary of a retirement account. We gratefully acknowledge and celebrate the following members of the Heritage Partner Society who have included Luther Manor (ULPA) and/or Luther Manor Foundation in their charitable estate plans. Their generous intentions go a long way toward ensuring the continuation of Luther Manor's mission in the future.

| Mary Ann<br>Abrahamson                  | Mary Alice Dean<br>Ardell Doerr       | Kenneth Holley<br>Clarence Holtze <b>†</b> | Anita Lucht<br>Edwin & Janice              | Glenn Port <b>†</b><br>Jean Rosier       | Rev. Jack E.<br>Trethewey <b>†</b> |
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The individuals listed below included Luther Manor (ULPA) in their estate plans. We celebrate the lives of these individuals and acknowledge their legacy, which lives on in Luther Manor's mission. Fred Ammerell, Marilyn Bub, Ruel Fessenbecker, Ruth Hart, Eunice Koehler & Martin Panning

If you are interested in learning more about planned giving, please contact Cherie Swenson, Executive Director - Luther Manor Foundation at cswenson@luthermanor.org or at 414.831.8950.

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