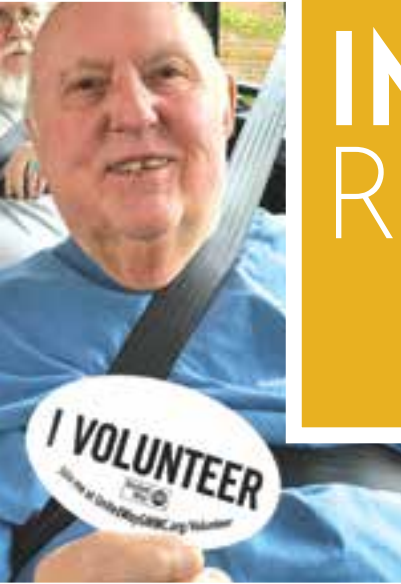


IMPACT REPORT 2017



LUTHER MANOR
A Life Plan Community

TO OUR STAKEHOLDERS

Stephanie Chedid
President & CEO
Luther Manor



Sharing God's love and enriching lives are long standing tenets of the Luther Manor organization. This holds true today even as the world and our industry of care changes. 2017 was the first year of our three-year strategic plan. The plan is designed to adapt the organization to relevant changes, create nimble operating systems for the future and inspire a culture of community and care designed in God's image.

We included resident feedback and ideas to set priorities for continued improvement and renovations. Staff participated in employee engagement surveys and work groups to help drive employee satisfaction, retention and ultimately resident satisfaction. We added an organization-wide electronic medical records system, exceeding industry norms for utilization and implementation. We saw the completion of significant road construction that paved the way (pun intended) for landscape and signage initiatives underway this spring. Grant dollars helped pay for the implementation

of an access control system to help safeguard our campus. Therapy services were enhanced through an engagement with a nationally recognized provider and we transitioned to an outside pharmacy to help ensure our resources are focused on providing exceptional resident care. And, we set the stage for continued progress in 2018. It was a year of change and progress – grounded in our long standing tenets of sharing God's love and enriching lives.

As we continue with our plans, adjusting to internal and external forces, the Luther Manor team remains grounded in our mission and driven by our vision in support of one another, our remarkable residents and their families, and our broader community. Thank you to every staff member, each volunteer and our many donors who make our mission possible, and to the families and residents who allow us to serve. It is a pleasure and an honor.

Stephanie Chedid

Share
God's love
by
enriching the lives
of
older adults



Leading
the way
in
abundant living
for
all who trust us
to
care

SHARING GOD'S LOVE



9,679
dollars given by
employees to Luther
Manor & Luther Manor
Foundation

625

hats, scarves & pairs
of mittens made and
donated by residents to
local homeless shelters



120

dollars raised
by Santa's
Brunch Bake
Sale; proceeds
purchased toys
donated as
Christmas gifts
for area children

"Luther Manor residents are most grateful to have the support of generous donors who recognize the challenges that some have in affording the costs of health care as they age. In fact, these donors, that include employees of Luther Manor, family members of residents, and members of supporting congregations, provide almost miraculous support for residents in need, allowing them to face the future with confidence that care will be provided for them. While motives for giving vary, in almost every case love for Christ and others are significant reasons behind these gifts. Thank you, dear friends of Luther Manor and its residents."



Tom Buck,
Foundation Board Chair

620

dollars raised by Thanks & Giving Sale,
to purchase food for area food pantry



Youth
Volunteer

"I am often asked if one resident is my grandma – that's how close we are! The residents can turn around any negative day to the best day ever!"

1,200

pencils donated to
United Way during
backpack & school
supply drive



LUTHER MANOR FINANCIAL REPORT

BALANCE SHEET

As of 12/31/2017

ASSETS

Cash and Investments	\$25,021,586
Other Current Assets	3,386,349
Property and Equipment	20,911,590
Total Assets	\$49,319,525

LIABILITIES AND NET ASSETS

Current Liabilities	\$4,357,928
Founders Fees	9,018,818
Long-Term Debt	13,388,457
Total Liabilities	\$26,765,203

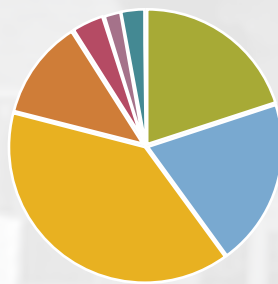
Total Net Assets **\$22,554,322**

Total Liabilities and Net Assets **\$49,319,525**

STATEMENT OF OPERATIONS

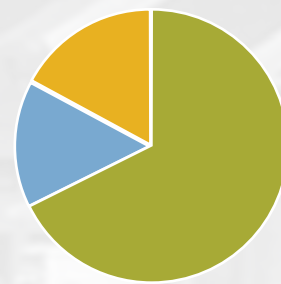
Operating Revenue
\$32,470,937

- Independent Living
- Assisted Living
- Long-Term Care
- Transitional Care Rehabilitation
- Hospice and Other Revenue
- Donations and Grants
- Investment Income



Operating Expenses
\$32,547,094

- Reimbursed Program Expenses
- Unreimbursed Charity Care
- General and Administrative



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 12/31/2017

ASSETS

Cash and Investments	\$17,167,752
Other Current Assets	42,348
Total Assets	\$17,210,100

LIABILITIES AND NET ASSETS

Total Liabilities **\$412,545**

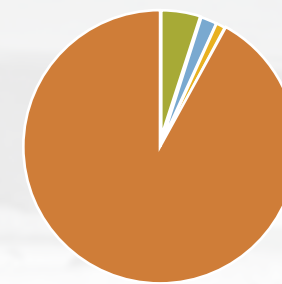
Total Net Assets **16,797,555**

Total Liabilities and Net Assets **\$17,210,100**

STATEMENT OF OPERATIONS

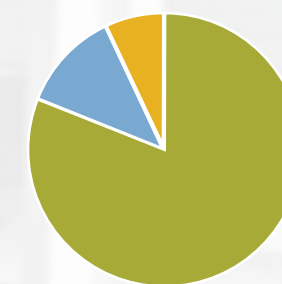
Revenue and Support
\$2,614,783

- General Donations
- Legacy Gifts
- Memorial and Tribute Gifts
- Investment Income



Foundation Expenses
\$1,246,294

- Program Grants
- Fundraising
- Professional Services



ENRICHING LIVES

320
resident satisfaction
survey responses

 349,758
meals served in
6 dining venues



8,544
Life
Enrichment
activity hours

13,327
facilities
work orders
completed

5,000,000
dollars of
unreimbursed
charity care

1,694
gifts made by
887 donors



"My grandmother and my parents enjoyed many happy and comfortable years at Luther Manor. Because of the fine facilities and the high quality of the staff, Luther Manor is a place I want to support and see continue with such high standards."

127,086
dollars in
contributions to
Luther Manor

480
bottles of Reformation
beer & root beer made

205,271
dollars in
contributions to
Luther Manor
Foundation

 8,200
weekly listeners
of Senior Living
Today with
Luther Manor



Ann
Stannard,
Donor

35,390
total hours
volunteered

410
total
volunteers

71
new
volunteers



437
full & part-time
employees

827,413
total employee
hours



Tim
Schoewe,
ULPA
Board Chair

"I was drawn to service on the Board at Luther Manor by the prospect of helping to make a difference for our seniors. What I found was a community of staff and residents who work collaboratively to create a better environment and safe place. The results of those efforts are humbling and demonstrate the very good things that occur when well meaning folks join to make Luther Manor not just a place to reside, but a home."

17,000
dollars donated
to TEAM fund

182,000
dollars awarded
by the City of
Wauwatosa in a
Community
Development
Block Grant;
enabling the
painting of the
Health Care
Center with
497 gallons of
antimicrobial
paint



286
Laugh & Learn
event guests

3,000
lights on the
Love
Lights tree,
remembering &
honoring loved
ones

915
total residents &
participants cared for

1,502
dozen cookies
received as donations
for Coffee Carts



5,068
miles put on new
bus to provide
226 rides to
residents &
participants



2017 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 during the 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

Den of Antiquity Resale Shop
 Friends of Luther Manor
 Gwenda French Endowment Fund – ELCA
 Glenn & Lois Port

PRESIDENT'S CIRCLE

Anonymous (2)
 Harvin & Mary Ann Abrahamson
 Advent Lutheran Church, Cedarburg
 American Funds
 Martha Andean
 David & Carol Anderson Family Foundation
 Carol Baylon
 Nancy Becher & Miloudi Elafess
 Richard & Shirley Ann Behrendt
 BMO Harris Bank
 Dorothy Brosin
 Stephanie Chedid
 Thomas & Joyce Christie
 Cleary Gull
 Richard & Elizabeth Diehl
 Faith Lutheran Church, Cedarburg
 Audrey Falk
 Fox Point Lutheran Church, Fox Point
 Dennis & Susan Giza
 Greater Milwaukee Foundation
 Marge & Fred Brossmann Fund
 Greater Milwaukee Foundation's Flomar Thanksgiving Fund
 Inga Harwick
 Sue Headlee
 Paul Heck
 Betty Heibler †
 James & Patricia Hoffman
 Holy Cross Lutheran Church, Menomonee Falls
 Julie Jolitz
 John & Doris Keller
 Dale & Dollie Kirchner
 Constance Kling

Rev. D. William Knapp
 Eunice Koehler †
 Krause Funeral Homes & Cremation Services, Inc.
 LeRoy Krenzke
 Stanley & Kathleen Krueger
 Charles Levenhagen Family Trust
 Luther Manor Train Room
 Coleen Marshall
 R. Thomas McConnell
 Richard & Karen Merklein
 Moertl, Wilkins & Campbell, S.C.
 Janice & Raymond Perry Community Fund, Inc.
 William Pickering & Joy Tapper
 PNC Bank
 Steven Poppert
 Gail Povey
 PTK Sales, LLC – HCI Fundraising
 RBC
 Renaissance Charitable Foundation – The Schulz Family Fund
 T. Rowe Price
 Shepherd of the Hills Lutheran Church, Hubertus
 Silseth Family Charitable Fund
 Sodexo
 Jill Strawbridge
 St. Matthew's Lutheran Church, Wauwatosa
 Stu's Flooring
 Cherie Swenson
 Arlene Watson
 Wauwatosa Savings Bank Foundation
 Wenthe-Davidson Engineering Co.
 Brian & Rebekah Wickert
 Willis Foundation
 Robert & Jacquie Zeman

FOUNDER'S CIRCLE

Bruce Allen Ltd
 Arrowpoint Partners
 Ascension Lutheran Church, Milwaukee
 Leota S. Benson

Robert & Caryl Braatz
 Thomas & Jane Buck
 Ardell E. Doerr
 Mary Flynn
 Rev. Ronald G. Froehlich
 Golsteyn, Kult & Goldsteyn SC
 Patrick & Laurel Hansen Family
 Imagine Nation Books, LTD. dba Books are Fun
 Marcy Jordan
 Marjorie Jothan
 Rev. David & Susan Keller
 Anthony & Jean Keough
 Rev. Dr. Wolf D. Knappe
 Richard & GERALYN KOEHLER
 Joyce Koenitzer
 Lutheran Deaconess Motherhouse at Milwaukee
 Marsh & McLennan Agency
 JP Morgan
 B. R. Mortag
 David E. Myers
 Erik Nelson
 Lawrence & Vicki Nines
 Northwestern Mutual Foundation Volunteer Support Program
 Jean H. Novotny
 Mr. Robert A. Otzelberger
 Paratech Ambulance Service
 Prince of Peace Lutheran Church, Milwaukee
 PRN Uniforms
 Redemption Lutheran Church, Milwaukee
 Dr. David & Kimberly Schiedermayer
 Timothy & Rev. Margaret Schoewe

Jeanette A. Schultz
 William & Jane Schulz
 Spano Pratt Executive Search
 Smart Moves LLC
 Thrivent Choice Program
 Mr. James Thunes
 Norbert & Sharon Tym
 Bonnie Vick
 Wells Fargo Advisors
 Greg & Susan Zacharias

SUSTAINER'S CIRCLE

Anonymous (19)
 7-Eleven Asset Protection Team & Jackie Smith
 Abiding Savior Lutheran Church, Milwaukee
 Lucille Abshire
 AIG Inc. 2008 Securities Litigation
 Barbara Alpert
 Robert & Susan Ames
 Richard W. Ammentorp
 Kevin & Mary Jo Anderson
 Dr. Fredrick & Kay Austermann
 Nancy Bagemihl
 Dr. Stephen & Penny Baker
 David Bauer
 Kevin & Susan Baumann
 Thomas & Annelee Beaumont
 Larry & Eleanor Beckman
 Robin Beery
 Gerald & Patricia Behling
 Janet M. Beltman
 Nadine Bergstrom
 Deborah Biebl
 Nancy Blachowski
 Robert & Ellen Bladorn
 Gail Borema
 Karen E. Brown
 Dennis & Linda Byrum
 Dr. Bruce & Kathi Campbell
 Capital Investment Services
 Steve & Gloria Cartwright
 Sharon Chipman
 Christ the Victor Lutheran Church, New Berlin
 Dallas Behling
 C.H. Coakley & Co. Inc
 Mark & Kathy Conrad
 Robert Couchman
 John & Bonnie Curran
 Jeff & Kathy Czarniak
 Marjorie P. Davis
 Dillett Mechanical Service, Inc
 Donate Well
 David & Barbara Ellwein
 Environmental Innovations, Inc
 Erffmeyer & Son Co. Inc

Donald & Sandra Fahning
 Laurie Fede
 Fidelity Charitable
 Mike & Teri Flemming
 Wayne & Wendy Foreman
 Gordon & Roberta Fritsche
 Linda Gaalaas
 Galilee Lutheran Church, Pewaukee
 Robert & Kathleen Gallion
 Ralph C. Ganswindt †
 Sandra Gepfert
 Mary Ann Goodman
 Larry & Jill Goring
 Grace Lutheran Church, Grafton
 Bonnie Gregg
 Kari Gundrum
 William & Penny Gutekunst
 Nancy Hahn
 Kathleen S. Hanold
 Gail Hanson & Richard Graebner
 Mr. & Mrs. R. Hayek
 Marjorie Heinrich
 Joyce Heinrich
 Barbara Hensley
 June A. Herman
 James & Nicole Hermann
 Thomas & Jeanine Heumann
 Joan G. Heyne
 William F. Hoefs
 Peter & Linda Hotz
 Mary Houseman
 Hub International
 Steven & Debra Jensen
 Mary Lynn Johnson
 Lee & Mary Jost
 Ikar & Araceli Kalogjera
 Betty E. Kannal
 Hans Karkow
 Jane M. Kassens
 John & Cheryl Kersey
 Mary Ellen Kiesner
 Kingo Lutheran Church
 Stephen L. Knowles
 Wayne & Barbara Kollath
 John & Chris Kosma
 KPMG AG

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 Paul & Sue Kronberger
 Peter W. Kwasniak
 Lake Park Lutheran Church, Milwaukee
 Mark & Jeri Lathrop
 Christine Layne
 Marie LePage
 Jill Lindberg
 Rosemary Link
 Barbara H. Lohr
 Rev. Carl & Eileen Lund
 Luther Memorial Lutheran Church, Milwaukee
 Mark & Mary Madigan
 Lauren Malensek
 Thane & Carolyn Malmstone Jr.
 Edward & Jeanine Maly
 Timothy & Christine Marek
 Nancy L. Matton
 Betty Mattson
 Linda Mayer
 Kathleen McNally
 Frank & Kathy Mehnert, Jr.
 Ruth Militzer
 Corwin & Patricia Millier
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 Morgan Stanley
 Dr. James C. Morgenroth
 Wayne Mueller
 Rick & Kim Nevers
 Judith G. Oehler
 Ann Oldham
 Karl & Ellen Olinger
 Charles & Rebecca Olson
 Sherry Olson
 CDR. Robert E. Palmer USN (Ret)
 Betsy Panzer
 Parasol Alliance LLC
 Rev. David Patterson
 Sandy Patterson
 Photo Pictorialists of Milwaukee
 Jim Pittelkow
 Philip Poenisch
 Carol J. Prange
 Robert & Sally Probst
 Janet Quail
 Realty Executives Integrity
 William & Elvira Reardon
 Donald P. Reiff
 Patricia A. Reynolds †
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 Robert & Audrey Richter
 Marilyn Ring
 Carol Rotgers
 George & Dotty Roth
 Fredrick & Esther Rusch
 Gilbert & Kathleen Russo
 Russell & Margaret Rutter
 Marilyn Sanders
 D. Jane Sandstrom

Charles & Luetta Sazama
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 William Schier
 Lisa Schmick
 Lori A. Schmick
 Mark & Cheryl Schmitz
 Norman Schoenleber
 Mary Rose Schroeder
 Elmer E. Schultz
 Christopher & Lori Schultz
 William H. Schulz
 Charles Schwab & Co. Inc
 Mildred Seefeld
 Nickolas T. Sgarlata
 Helen H. Shannon
 Reed & Kathryn Simmons
 Tom & Carolyn Simpson
 Joan Singer
 Byron & Jackie Smith
 Robert & Sandie Smith
 Mark R. Sorensen
 St. John's Lutheran Church, Brookfield
 St. Mark's Lutheran Church, Cudahy
 Vida C. Stanton
 John & Linda Stehman
 Barbara Steidl
 Dolores Stops
 Rosemary Stuart
 Steven & Michelle Sturgill
 Patricia Tesch
 May yer Thao
 Dr. Richard Thiede & Susan Penl
 Arline J. Thoss
 Jeffrey & Linda Tortomasi
 Thomas & Sharon Tradewell
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 Orville C. Treptow
 Rev. Jack E. Trethewey †
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 Scott Van Why
 Melanie R. Varin
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 David & Lynn Weatherby
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 Ernestine Wegner
 Pamela Weisel
 Marie E. Weiss
 Dr. Ronald & Agnes Wells
 Susan L. Wendt
 Janice White
 Whitnall Park Lutheran Church Endowment Fund, Inc.
 Art & Mary Ann Wigchers

William Wigchers
 Terrence & Catherine Wilkinson
 Thomas H. Woehrl
 James & Rosann Young
 Your Cause LLC, Trustee for Thrivent Financial
 Your Cause LLC, Trustee for Thrivent Financial Foundation
 Carol Zelt
 Linda Zywicki

FRIEND'S CIRCLE

Anonymous (22)
 Mark & Karen Aamot
 Patricia Abfalder
 Faye Aebly
 Rev. Ronald & Barbara Albers
 Kay Alzuhn
 Dorothy Anderson
 Audrey Arndt
 Marilyn Arndt
 Ray & Carol Banks
 Jean Bartkiewicz
 Russell Bassel
 Violet Baumgart
 James Baumgartner
 Brian & Julie Baumler
 Sharon Baus
 Jim & Cheryl Bayer
 Anne Becker
 Dallas Behling
 Dennis & Kathleen Beier
 Laurice Bell
 Avis Beranek
 Tom & Sue Beranek
 Gerry & Judy Beuk
 Rev. William Beyer
 Ronald & Jean Biffel
 Donald & Dee Birschel
 Mark Bischel
 Elwyn & Sandra Bischmann
 James & Kathleen Bittman
 Roger & Darlene Bjerke
 Michael & Barbara Blacksmith
 Dennis & Linda Blair
 Dr. Steve & Nancy Blatnik
 Robert & Ann Borowski
 Wayne & Bonnie Bostrack
 Grace L. Bott
 Robert & Linda Bougie
 Sherry L. Boyd
 Paul & Danette Braun
 Linda Brazil
 Mary Breest
 Charles & Susan Brenner
 Beverly Bridich
 Janice Brooks
 Russell & Pamela Brown
 Mary Bruce
 Elsbeth Bruhnke
 Janice L. Bruskevitz

Marilyn Bub †
 Randolph & Sherry Buettner
 Gladys Bullis
 Steve & Margie Burdick
 Rita Burfeind
 Charles & Mary Buscher
 Mary C. Buscher
 Lynn Butenhoff
 Adelaide Cole
 Claudette Calenzo
 Elizabeth Carleton
 Doris Carlson
 Susan Carlton
 Barbara Carter
 Mark & Terri Chelmoski
 Aleta Chossek
 Mary Jo Christensen
 Mark & Sue Christiaansen
 Joan Cianciola
 Eleanor Ciarro
 Carla A. Claussen
 Colleen Clexton
 Robert & Joan Coffey
 Lynne Cole
 Duane & Joyce Corder
 Richard Cordie
 Robert & Renee Cornell
 Brian & Jennifer Cranfill
 Marie Custer
 Beth Cyr
 Bradley & Karen Czebotar
 Marianne Czisny
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 Jerold & Avis Dallman
 Catherine Davidson
 David & Mary Davidson
 Bill & Kathy Davis
 Irene Davis
 Cindy Deck
 Marianne DeGrace
 Louise Dieck
 Divine Savior Holy Angels High School
 Shelby & Janet Dixon
 Eric & Mary Dobke
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 Karen Doubek Gleichner
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 John & Judy Drees
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 Russell & Bonnie Duffner
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 Pauline Eastberg
 Elisabeth Eaton & Steven Ryan
 Donald Eggert
 Cindy Ehlers
 Donna Eigel
 Jim & Sandy Elliott
 Pat Elliott
 Marie Emmons
 Janet G. Engel
 Lois Engseth

Marion Erickson
 Carol Evert
 Michael & Diane Evert
 John & Cheri Evraets
 Leah Farnsworth
 Bob Farrell
 Don & Rose Faye
 Christine Fenner
 Jim Fenske
 David Finger
 Sandra Finger
 John & Wendy Finley
 Ingrid L. Finnan
 Sharon E. Floryance
 James & Lori Flynn
 Charlie & Donna Franchino
 James & Phyllis Frank
 Steven & Patti Franz
 Warren & Connie Frieberg
 Carol Galbrovik
 Sally Gallatin
 Nancy Ganung
 Gene & Barb Geiger
 Yvonne Gelhausen
 Patricia Gengler
 Maxine Gerken
 Deb Gerner
 Henry & Carol Gerner
 Terry & Wendy Goldbach
 Michael & Elinor Goodwin
 Debra Gracyalny
 Gregory Graeme
 Marie Groblewski
 Alice Gruell
 Catherine Davidson
 Jeffrey & Mary Beth Gubbins
 Lorraine Guenther
 Drs. Bruce A. & Constance D. Gutknecht
 Sandra Gutowski
 Steven & Helen Gyarmaty
 Donald & Arleen Haas
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 Gail Hahn
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 Jo Ann Hegarty
 Deb Heilman
 Bernice M. Heimerl
 Marcella R. Heimerl
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 Laurie Hodel
 Lucille Hoefner
 Dale & Carol Hoefner
 Jeffrey & Deborah Hoefft
 Terry & Kathy Hoepfner
 Klaudia Hollander
 Kenneth F. Holley
 Earline Hollub
 Penny Holt
 Gladys Hoppe



LUTHER MANOR

A Life Plan Community

A ministry of the United Lutheran Program for the Aging, Inc.
4545 N. 92nd Street • Wauwatosa, WI 53225

ULPA Board of Directors, 2017

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Keith Fraleigh, Vice Chair
Stephanie Chedid, President
Kris Iwinski, Treasurer
Steve Knowles, Secretary

Directors

Karen Gibbs
Elaine Schmeda
Ray Zastrow, MD

Luther Manor Foundation Board of Directors, 2017

Officers

Tom Buck, PhD, Chair
Stephanie Chedid, President
Fred Anderson, Treasurer
Bill Pickering, Secretary

Directors

Kari Gundrum
James Jung
Jim Pittelkow

Executive Director

Cherie Swenson

Board Committees, 2017

Audit Committee (Joint)

Fred Anderson
Stephanie Chedid
Kris Iwinski
Jim Pittelkow
Tim Schoewe

Executive Committee (ULPA)

Stephanie Chedid
Keith Fraleigh
Kris Iwinski
Steve Knowles
Tim Schoewe

Finance Committee (ULPA)

Stephanie Chedid
Keith Fraleigh
Kris Iwinski
Steve Knowles
Tim Schoewe

Nominating Committee (Joint)

Stephanie Chedid
Keith Fraleigh
Bill Pickering
Elaine Schmeda
Tim Schoewe
Cherie Swenson

Leadership Team, Current

Stephanie Chedid, President & Chief Executive Officer
Art Keup, Chief Financial Officer
Julie Jolitz, Chief Clinical Officer
Lauren Malensek, Chief Human Resources Officer
Patrick Hansen, Chief Resident Experience Officer
Cherie Swenson, Executive Director, Luther Manor Foundation

1,548
tweets sent by
Luther Manor

635
Facebook
followers