



GENEROUS *generations*



OPRS Foundation Fiscal Year 2014 Annual Report



Our mission is to partner with donors
to provide charitable support for
the people, projects and programs of OPRS.

We believe in being **DONOR CENTERED:**

- Fostering relationships with our donors and prospects is key to our success.
- Gifts of all sizes create an enhanced quality of life for all those we serve.
- We are dedicated to sharing our gratitude with enthusiasm.
- Donors have the right to designate gifts and we are committed to carrying out their intent.

We believe in operating with **STEWARDSHIP & INTEGRITY:**

- We practice the highest ethical standards of fund development and fiscal stewardship, consistent with the Donor Bill of Rights.
- We have the obligation to review all gifts to ensure that they are in the best interests of the donor, Ohio Presbyterian Retirement Services, OPRS Communities, Senior Independence and the OPRS Foundation.
- Raising funds in a cost effective manner and presenting clear and timely financial information are essential.
- Assets must be carefully managed to earn competitive returns and safeguard the funds for the long term.

We believe in **CONTINUOUS ACHIEVEMENT:**

- Visionary, forward-thinking volunteers and staff are essential to our success.
- A team approach, collaborative environment and creativity are imperative for organizational growth.
- The continuing education of volunteers and staff is key to improving Foundation performance.
- We have a responsibility to educate our constituents about the charitable needs of OPRS, giving opportunities and results of charitable gifts.

Dear friend,

Generous generations, indeed!

A lifetime of experiences shape our attitudes and behaviors, including those about charitable giving. In this report, you'll read about several donors like you and how their life experiences continue to influence their giving today.

And what a great influence it is! We're pleased to report that **you and other donors gave more than \$10 million** through the OPRS Foundation during fiscal year 2014 (July 1, 2013 – June 30, 2014). This is the third highest total in our 28-year history.

Donor partnership at this level reinforces that services like ours are an important part of the charitable landscape and are necessary in the collective effort to support healthy families.

The collaboration between donors like you and OPRS reflects the alignment of our mission with your values, and demonstrates your trust in our ability to create results. The enthusiastic support and vision of people like you is encouraging as we work together toward a common direction for the future.

Thank you for your part in this historic year!

Donald E. Hoffman
OPRS Foundation Board Chair

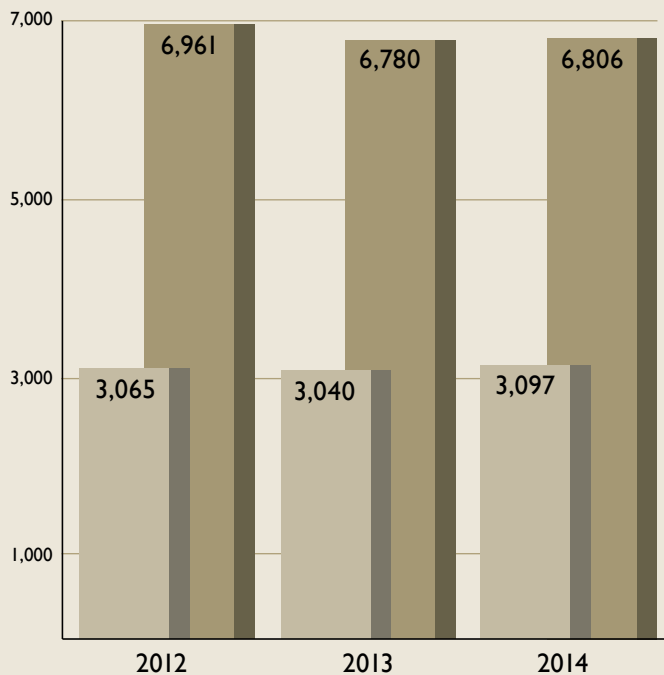
Thomas G. Hofmann
OPRS Foundation President



Financial performance

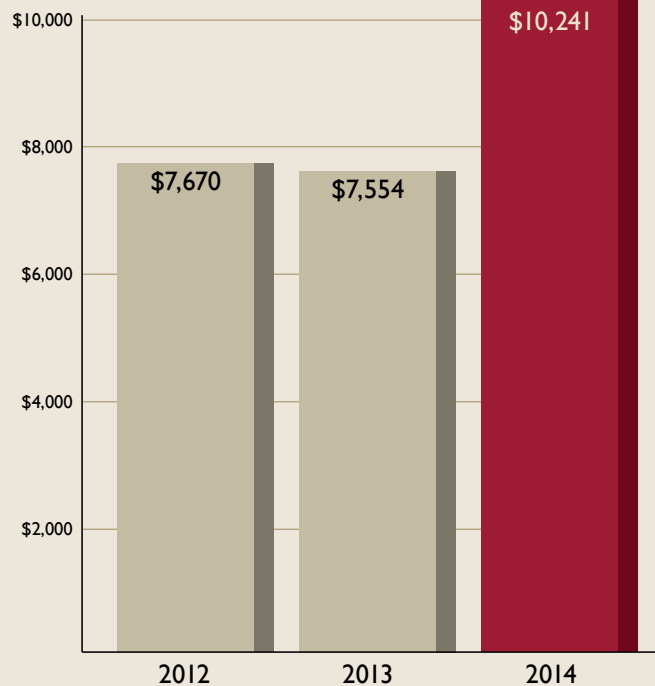
Total Donors & Gifts

Donors Gifts



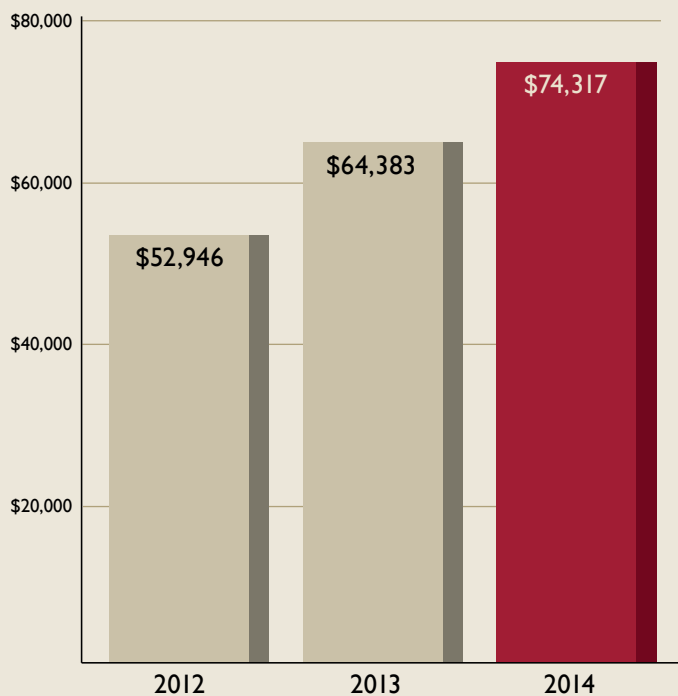
Total Giving Performance

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Total Assets

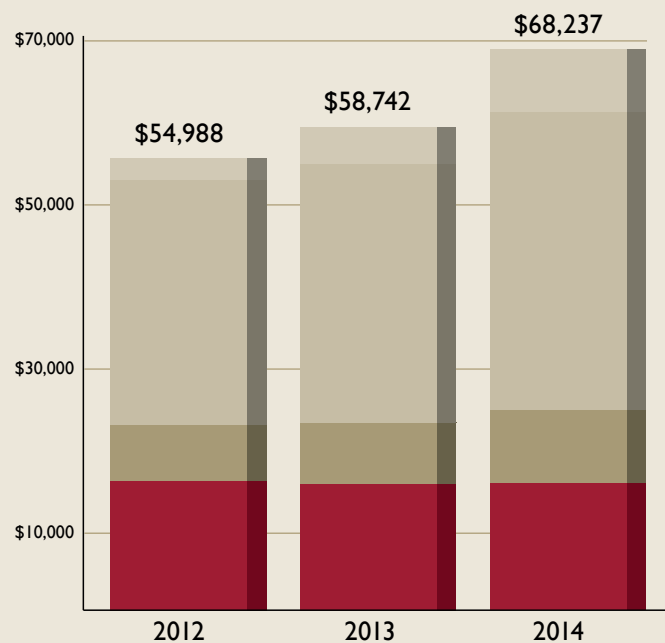
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Total Endowment

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Pledged & Other Annuities Invested Market Gain

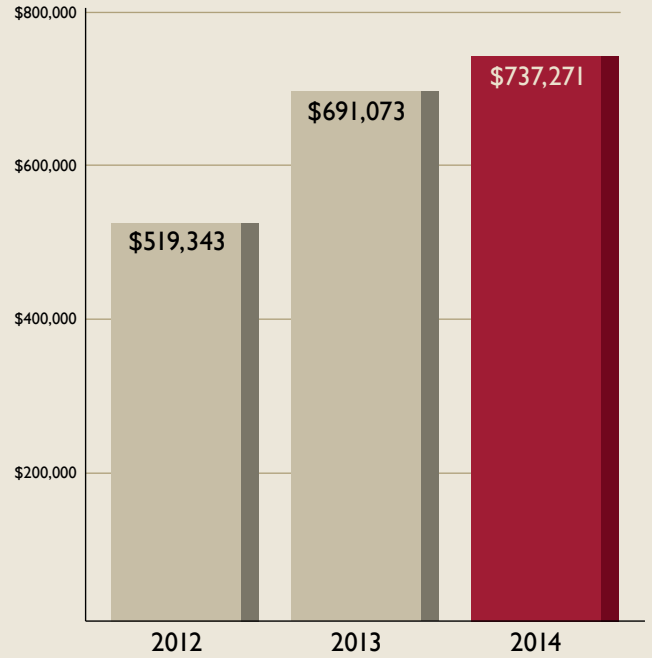


Investment Portfolio Performance

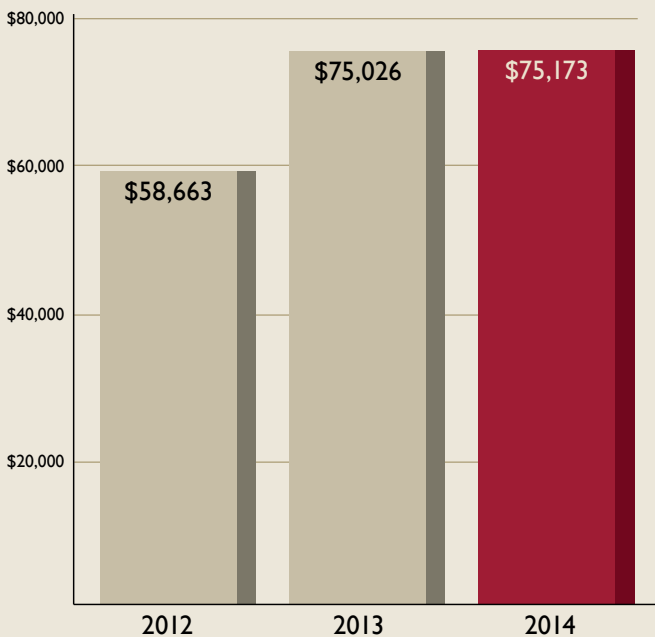
(Based on calendar year)

	Performance	Investment
2013	14.24%	\$49,038,624
2012	13.9%	\$42,207,732
2011	-3.16%	\$37,430,387

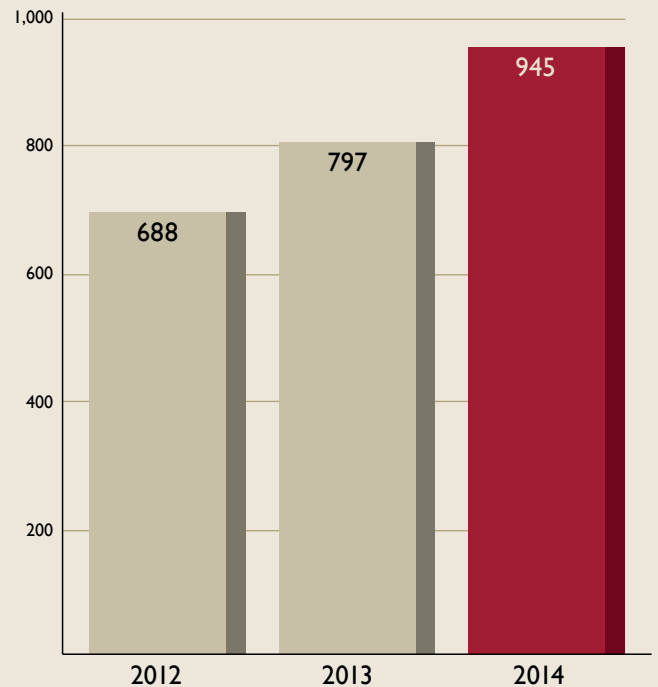
Senior Independence Total Giving Performance



Hospice Annual Giving Performance



Hospice Donors



Key accomplishments

\$10,241,486 was raised, which is 32 percent higher than fiscal year 2013 performance, and 18 percent higher than the fiscal year 2014 budget.

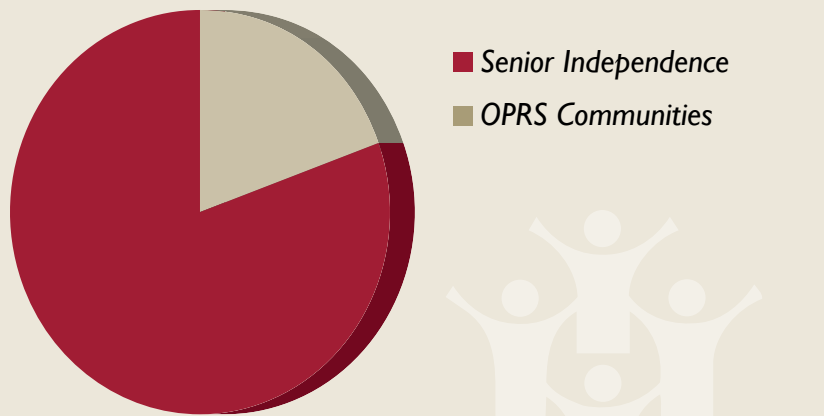
Total assets rose to more than \$74 million, an eight percent increase over fiscal year 2013 and an all-time high. Investment performance remained strong at 14.24 percent.

Senior Independence received nearly \$740,000 in gifts, which is 26 percent higher than budgeted performance and nearly seven percent more than was raised in fiscal year 2013.

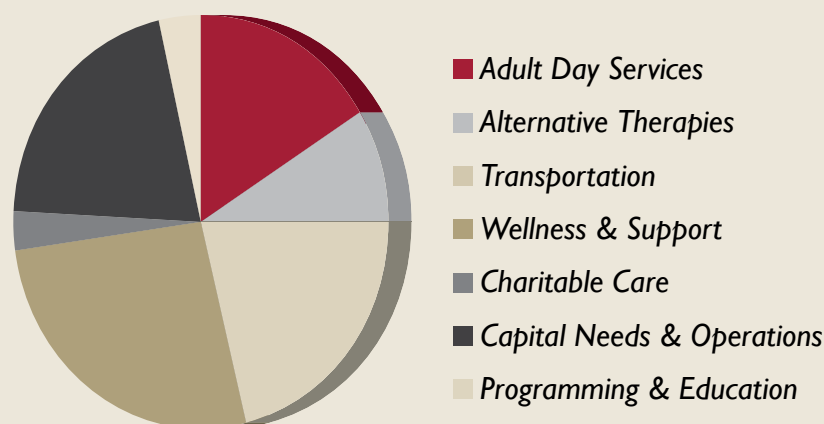
A Statewide Task Force was convened to study the relationships and networks between our numerous locations and the external community. Further work on this initiative will determine if opportunities exist for fundraising at a statewide level.

Grant Support Highlights

Total Grant Support: \$717,983



Grants by Project



Our organization was fortunate to receive a number of generous grants in fiscal year 2014.

Among them were a grant from the Cardinal Health Foundation for the Home to Stay program in Senior Independence's Greater Toledo region.

Westminster-Thurber Community received a grant from The Columbus Foundation for a recreational therapist.

Government grant support was also strong, with support from the Ohio Department of Transportation for light transit vehicles; the Ohio Department of Education for food reimbursement at adult day centers; and two area agencies on aging for transportation and personal care.

Thanks to all the grant funders who supported our mission!

Generous generations



Wes Prout, the third-generation president of Prout Boiler, Heating & Welding, Inc. learned about giving back from his father and grandfather.

“Being business owners, they thought it was important to take care of the people who took care of them,” he said.

Wes’ own generosity has included strong support for the Mahoning Valley Lifelong Learning Institute at **Park Vista of Youngstown**, and he has encouraged other local businesses to do the same.

It was natural for Wes to support Park Vista, as the Prout family history includes a connection to the campus.

Not only is there a business relationship, but Wes’ grandmother was a Park Vista resident more than 20 years ago. Wes fondly remembers his entire family going to Park Vista every Saturday to take his grandma out to dinner.

Wes is more than happy to continue the family tradition of giving back, saying that a feeling of gratification comes from helping others. “It feels pretty good to be able to help people out,” he said. ■

Read expanded versions of these stories at www.oprsfoundation.org

Breckenridge Village isn’t just where Susan Bookshar works – it’s also a big part of her family history.

Both of Susan’s parents served on the board of directors, as did she until she took a job with the campus’s marketing department.

Breckenridge’s Shafer/Schweitzer apartment building is even named in part for Susan’s uncle and aunt, Art and Betty Schweitzer.

From her family, Susan learned to give back to causes that are close to her heart. That’s why she supports the Life Care Commitment and Spiritual Life Endowment at Breckenridge through her charitable giving. ■





Marjorie “Marge” Bristow’s childhood home was one where there were always a few extra mouths to feed, those of the foster children taken in by her parents.

Early in her life, the **Swan Creek Retirement Village** resident saw this example of helping others who are less fortunate, and that lesson has stayed with her.

Marge has given several charitable gifts to help enhance Swan Creek for the benefit of her friends and neighbors.

By supporting projects like the remodel of the special care dining room, the landscaping and grounds fund, and the Life Care Commitment, Marge is helping to make Swan Creek a better place for all who live and work there.

Marge said she likes to extend a helping hand when she sees an opportunity. “I like to help people and see that they get some assistance to enjoy life a little bit,” she explained.

“Why have it and keep it all to yourself? Share it,” she said. ■



As an educator, Dr. Velma Pomrenke has taught many lessons.

The **Rockynol** resident has also been a student, learning life’s lessons as demonstrated by the generosity of generations that went before.

Examples of caring came early for Velma, as her parents were giving people.

During the Great Depression, they gave their minister produce from their farm to help his family.

Velma also recalled her mother taking along eggs or

milk when the family visited an aunt on Saturday nights.

Velma has taken her parents’ example of helping others and applied it to her own life, having supported her fellow Rockynol residents through charitable gifts for the Life Care Commitment.

Despite today’s emphasis on self-sufficiency, Velma said that people who have “made it” did not make it alone.

“To recognize that and be grateful for what others have contributed to our lives enriches our lives greatly,” she said. ■



Read expanded versions of these stories at www.oprsfoundation.org



During the Great Depression, Robert "Bob" Bredbeck saw homeless and hungry people whose lives had been shattered. He also saw what his parents did: They helped.

Bob remembers his family providing shelter to a homeless family, and how his father sometimes employed helpers on his farm.

Most of all, Bob witnessed his parents always being as generous as they could, and he lives by that philosophy to this day.

A resident of **The Vineyard on Catawba**, Bob has supported the campus and his fellow residents through charitable giving.

Bob has contributed to several capital projects and also supports the Life Care Commitment.

"It's a wonderful place to live," he said, adding that he likes his neighbors and the beautiful grounds.

Bob has also given back through volunteering. "It's important to help others," he explained. ■

Llanfair Retirement Community

residents Ann and the Rev. James Eddy are longtime donors whose generosity represents a legacy. By example and by instruction, they learned about caring for others from their parents.

James' father supported the Boy Scouts of America, and James remembers seeing the time and effort his father gave. James was also inspired by his parents' lifetime of practicing Christian stewardship, something that he says helped him follow his own preaching later as a minister.

Ann recalled her father's habit of putting 10 percent of everything he earned into a small cedar box as tithing for his church. Years later, Ann acquired that box and has continued her father's tradition in her own life. Another practice Ann has continued is her mother's support of City Gospel Mission in Cincinnati. "I do it as sort of a memorial to her," Ann explained.

Just like their parents, the Eddys believe that giving is both important and necessary. "It brings a certain sense of peace to your own life," said James. "For me, there's a warmth that comes from being generous."

The Eddys have certainly shared their warmth and generosity with their fellow Llanfair residents. They have made charitable gifts in support of the Life Care Commitment and various capital projects.

Most recently, the couple became members of the campus's Named Endowment Circle when they created the James E. & Ann S. Eddy Spiritual Life Endowment at Llanfair. ■





The ongoing struggles of the Great Depression were evident during **Dorothy Love Retirement Community** resident Wilfred “Mac” McCoy’s early adulthood.

Both he and his father were laid off and rehired several times from the railroad, and in between spent time working on farms and hunting for odd jobs. In fact, most of Mac’s life with his late wife, Wilma, was spent moving from job to job, never settling in any one location for very long.

Those experiences shaped Mac’s views of helping others. But if you ask him, he wouldn’t say that he gives because he’s particularly charitable. To him it’s simply practical, important and enjoyable.

Mac values the Life Care Commitment for its role in helping residents with immediate financial needs. But Spiritual life endowment is where his strongest charitable values lie.

He wants to ensure that the program remains securely a part of campus life for the future, regardless of any potential financial limitations the campus may ever face. “Some of us feel this program just simply has to stay,” he said. “Some residents need spiritual support just as much as they need physical support.” ■



Mount Pleasant Retirement Village resident and donor Sarah Woods Baker learned about giving back early on. She and her family spent a few weeks every summer volunteering for a variety of mission projects, like building churches or community centers.

“I learned to give of my time and talents at an early age, and it has stayed with me,” she said.

Mount Pleasant’s bird sanctuary has greatly benefited from Sarah’s time and talents, as well as her charitable giving.

This piece of land became Sarah’s pet project when she moved to Mount Pleasant. She spends hours

of her time planning, planting, weeding and watering.

She not only helps to maintain the plants and other landscaping, but has also made donations for a retaining wall and other items.

Sarah says she loves Mount Pleasant, the people, and being able to help out. “It comes full circle; I give while I can,” she said.

Other residents frequently see Sarah heading for the sanctuary or walking the grounds with her dog.

“I love Mount Pleasant because you can do as much as you want,” Sarah shared. ■





Lake Vista of Cortland isn't just Elizabeth "Betty" Linville's home, it's full of childhood memories too.

Her great uncle owned a dairy farm on what is now the Lake Vista property. "My family has always loved this community and watching it grow," she said.

Betty was raised by her grandparents, and she remembers her grandfather always helping others whenever he could.

His example of generosity has stayed with Betty, which is why she helps her friends and neighbors at Lake Vista through charitable gifts for the Life Care Commitment and Spiritual Life.

"This is such a beautiful place. I want to make sure that others will be able to continue to enjoy the community, the camaraderie, and everything else that goes with Lake Vista," Betty shared. ■



William "Bill" Mitchell has many memories of being raised by his grandparents, and recalls hearing how they helped others during the Great Depression.

Bill's grandfather gave people food from his farm, and his grandmother gave away aprons and dresses she'd sewn from patterned feed sack cloth.

Their example of giving influenced Bill then, and still does today.

Bill and his wife, Beth, enjoy living at **Cape May Retirement Village** and give back to the campus through charitable gifts.

The couple is especially supportive of the Life Care Commitment. "I think it's great," Bill said. "I hope I never need it, but it's good to know it's there."

Bill enjoys giving, saying it's a great opportunity and a great feeling. ■



Westminster-Thurber Community resident Barbara "Barb" Frautschi remembers her parents being active in their church.

Barb herself was involved in church youth programs before she went away to college.

This early example in her life made an impression on Barb about giving back to others and supporting causes she believes in.

And she continues that practice today by making charitable gifts in support of Westminster-Thurber.

Barb said it's important for her to feel like she can help Westminster-Thurber maintain its high quality. "I want them to succeed and I want to do my part," she explained.

Barb encourages others to give as well. "Go for it - especially if your financial planner agrees," she said. ■

Foundation Leadership

OPRS Foundation Fiscal Year 2014 Board of Directors

Front row (L-R): Bruce D. Boyd, Assistant Treasurer | John L. Gray, Vice Chair | Donald E. Hoffman, Chair | Richard L. Hart, Assistant Secretary

Middle row (L-R): Sandra M. Adam | Louise Flower Pence | Stanley R. Seagle | David Thompson Morgan | Michael J. Kowalec | David Woodburn | Michelle B. Tognetti | Kathryn Gonser Eloff

Back row (L-R): Laurence C. Gumina, OPRS President/CEO | Richard B. Uhle, Jr. | G. David Hawley | Richard W. Mack | J. Brann Young | Keith D. Boone | Andrew Singer

Not pictured: Martha Bixler Milligan



OPRS Foundation Officers

Thomas G. Hofmann, President | Sue W. Welty, Vice President of Gift Planning |
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