



OHIO PRESBYTERIAN  
RETIREMENT SERVICES  
FOUNDATION

Where Donors Make A Lasting Impact

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# mission *in action*

A newsletter for donors and friends of the OPRS Foundation

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# PAW-SOME GIVING

## Grants help important animal program

More than two decades ago, a New York doctor identified three enemies of those living in long-term care: loneliness, helplessness and boredom.

Dr. William H. Thomas also offered three weapons to battle them: pets, children and gardening.

This philosophy, called The Eden Alternative, has been embraced throughout the world including at seven OPRS communities.

At **Westminster-Thurber Community** in Columbus, generous donations help pay for The Eden Alternative's animal expenses.

### Generous grants

Westminster-Thurber recently received several grants to help with these expenses. The Ferne A. Zetty/All for Animals and Robert J. McKeever Funds of The Columbus Foundation have provided support, and so has the Petco Foundation. Additionally,

Westminster-Thurber has been approved for a grant from the Build-A-Bear Workshop Bear Hugs Foundation.

Dr. Ann Crafton is the veterinarian who cares for these animals. She says the donors who support The Eden Alternative are to be congratulated, along with Activity Director Jamie Hobson and her staff. "These people have done a great job," says Dr. Crafton.

### Animal tales

At Westminster-Thurber, there are two dogs that are roaming, goodwill ambassadors; twelve cats that walk the halls; and seven rabbits that also make the rounds.

There are many studies supporting the benefits, like lower blood pressure, of people interacting with and caring for animals.

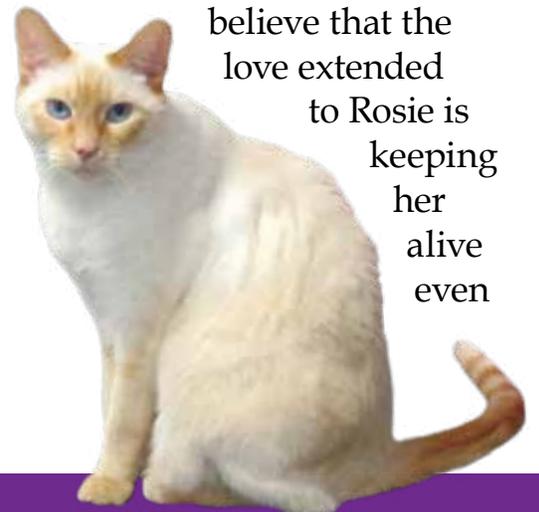
A Westminster-Thurber physical therapist says the presence of cats on campus

makes a big difference for one of her patients. "The cats are the only reason she leaves her floor and comes downstairs. They truly bring a smile to her face and warm her heart," stated the therapist.

Dr. Crafton said she has noticed an instinctively caring behavior in some of the cats at Westminster-Thurber. "Cats seem to know where they are needed," explains Dr. Crafton. "If people have not been out of their rooms in a few days, the cats go in."

One of the dogs, Rosie, a greyhound, is a wonderful therapy dog for many residents. But the residents keep Rosie going as well. You see, Rosie has bladder cancer. Many people

believe that the love extended to Rosie is keeping her alive even



after the limits of veterinary medicine have been reached.

Therapy rabbits are a surprise to some, but are an enjoyable part of the day for many residents. The rabbits are litter box trained and are taken around in a wagon, putting them at the perfect height to be petted by residents in wheelchairs.

Veterinary expenses are one way charitable gifts are used. As Jamie points out, "These animals didn't ask to be here, so you have

to have great respect for what they need." ■

**ON THE COVER:** *Rosie the greyhound visits with fellow Westminster-Thurber resident Velma Cooke. With help from generous gifts and grants, Westminster-Thurber is able to provide the animals with a comfortable home and the care they need and deserve.*

**PICTURED AT RIGHT:** *Thanks to help from donors, therapy rabbits provide comfort and companionship to Westminster-Thurber residents like Orbra "Liz" Lancaster.*



## GRANT HELPS MAKE THERAPY FUN

Thanks to the generosity of the Stranahan Foundation, **Senior Independence adult day center** clients in Toledo are getting some special help from Lindsey Lane, a Certified Therapeutic Recreation Specialist.

The benefits of recreation therapy are sometimes hidden within a fun activity, but are just as helpful as traditional

therapy. Lindsey finds out what the client enjoys, like sewing, playing cards or baking cookies, and uses it to help them. "Using activities they enjoy increases their participation throughout their daily lives," she says.

Kenna Minard, the center's director, says, "The clients are benefitting so much, and they don't even realize it!"

Kenna applauds the Stranahan Foundation for seeing the benefits of this therapy and renewing its support for a third year. "For the Stranahan Foundation to recognize the value that a recreation specialist brings to a setting like an adult day center...for that I give them all the kudos in the world," she says. ■

# FOR THE LOVE OF GIVING

## Charitable gift annuities help resident give back



Faith. Love. Giving. These three things have been the cornerstone of Bettymae “Betty” Carter’s life.

Betty (*pictured above*), an eight-year resident of **Breckenridge Village** in Willoughby, is a woman of profound faith who credits God for her wonderful life. “God has been a big part of my life all along; I don’t know what I’d do without Him,” she says.

One of Betty’s earliest recollections of her faith is that, as a little girl, if something was troubling her she’d run upstairs and lie across her bed and talk to God. She says He was always there for her and that it has been the same all her life – although she points out, “I don’t run upstairs and lie on the bed anymore!”

Love has also played an important role in Betty’s life. She and her late husband, John “Jack,” were married for 65 years. The couple met in high school, when Jack sat behind Betty in the school choir. “He liked my red hair!” Betty explains.

Together, the Carters built a family with their two sons, and also built the family business. Jack’s father founded Carter Diamond Tool Corp. in 1920 and Jack took over the business when his father passed away. Betty was by Jack’s side throughout his career, becoming an expert in her own right in the family trade.

Looking back on the couple’s life together, Betty couldn’t be more grateful. “Life was so good to me and Jack,” she recalls. “It has been such a blessing.”

This gratitude is perhaps what has most inspired Betty to give back and help others.

After moving to Breckenridge, Betty became involved with Stephen Ministries, an outreach program named for St. Stephen, who provided caring ministry to those in need. Betty completed many hours of training to become a Stephen Minister, and afterward spent several hours a week visiting with fellow Breckenridge residents who were going through tough times.

“I got involved in Stephen Ministry because I just love the people here so

much,” Betty says, adding, “It was joyous; it took such a big place in my heart.”

Betty has also given back to Breckenridge and her fellow residents through charitable giving.

In fact, during her eight years at the campus, Betty has made ten charitable gift annuities (CGAs) in support of causes that are close to her heart: Spiritual Life and the Life Care Commitment, which helps assure OPRS residents that they will always have a home even if they run out of funds through no fault of their own.

Betty has chosen to do the majority of her giving through CGAs because, as she points out, “[A CGA] helps for a long time, and it’s a good return for me as well; it’s security.” Additionally, because CGAs provide donors with fixed payments for life, Betty says she was able to give more than she could have through a different type of gift.

When asked why she’s chosen to give back to Breckenridge, Betty’s answer is simple: “It’s just such a good cause and seems like the right thing to do.”

Given all the faith, love and gratitude Betty has had in her life, it’s not surprising to hear that she finds helping others through charitable giving to be perfectly natural. ■

## THE PERKS OF A CGA

### Give back while getting back

Just like Betty Carter, many OPRS donors have discovered the benefits of giving through CGAs (charitable gift annuities).

Not only will a CGA provide you with fixed payments for life, those payments are partially tax-free and offer income tax savings if you itemize.

CGAs are a win-win: You get to help a cause that’s close to your heart, and, in return, you get fixed payments for the rest of your life!

### The real estate connection

Another perk of CGAs is that you can fund them with real estate. Instead of writing a check, you just sign over your property – and we still provide you with fixed payments.

If you or someone you know is having trouble selling your home, vacation house or other property this spring (or if you just don’t want to go through the hassle of selling), this could be the option for you.

The OPRS Foundation has been able to turn 17 properties into regular, fixed payments for their former owners. And we’d be happy to help you too!

If you’d like to learn more about CGAs, call your local gift planning director at the phone number listed on the back cover. They’d be happy to talk you through the process and even provide you with a free illustration with no obligation. ■

# ENDOWMENT

## What it is, and what it means for you

Endowment is a word that most of us have heard but might not fully understand. Universities have endowed chairs; cultural institutions like museums and theaters often rely on endowments; and even we have a Named Endowment Circle. So what is endowment, and why is it important?

### Let's start with the basics

When you choose to make a gift in support of a charitable organization, you typically have several options for how you'd like your gift to be designated.

For instance, at OPRS you can choose things like capital improvements, the Life Care Commitment and yes, endowment.

If you choose capital improvements, your gift could be used to help build or remodel a building. If you choose Life Care, your gift will help residents who have run out of funds through no fault of their own. And if you choose endowment, your gift will be invested.

That's right - endowment is just a charitable investment you make in an organization.

### Need an example?

Let's say you write a check for \$1,000 for endowment at your local OPRS community. We'll deposit your \$1,000 into the endowment fund you've specified, and the OPRS community you've chosen to support will receive an annual payout.

It really is that simple! Yet you still might be wondering why endowment is so important to not-for-profit organizations like OPRS.

### The diamonds of giving

You've likely heard the phrase, "diamonds are forever." Well, endowments are the diamonds of giving. It may sound cliché, but it's true. Because endowment gifts are invested and the principal remains untouched, the initial gift lasts...forever.

For organizations like ours, these gifts are precious. Having a healthy endowment means guaranteed gift support every year. It also helps us assure that endowed programs will always have support, whether we have room for them in our operating budget or not.

So what does this all mean for you?

### Generosity that lasts

If you have charitable causes that are close to your heart and you want to be able to support them even after you're gone, then endowment is undoubtedly for you!

When you contribute to endowment, you're contributing to an organization's future, plain and simple. A gift for endowment will give you the satisfaction of knowing that your generosity will live on, providing charitable support to your favorite cause forever. ■

## THE NAMED ENDOWMENT CIRCLE

The OPRS Foundation created the Named Endowment Circle to recognize the generous donors who provide leadership-level endowment gifts in support of OPRS.

Our Named Endowment Circle is divided into two categories. Endowment recognition starts at the Supporting Level, which is \$50,000 cash/\$100,000 deferred, or \$100,000 cumulative.

Program level endowments represent the highest level of endowment giving, recognizing those whose cumulative gifts total \$500,000 or more.

Listed below are the 31 Program Level Named Endowment Circle members who have invested in the future of OPRS and will make a lasting impact on the lives of the people we serve. ■



## *program level endowments*



### **BRECKENRIDGE**

Anonymous  
The Clapp Family Endowment  
The Elmer & Olga Juhnke Endowment  
The Norbert A. Lange Trust  
The Marjorie Noble Lyons Endowment  
The Anne M. McKee/Helen Sharadin Endowment  
The Karl & Mary Prindle Endowment  
The Edith H. Smith Endowment  
The Ethel Weiman & Ruth Boza Endowment

### **DOROTHY LOVE**

The C.H. Ginn & Vera D. Ginn Endowments for  
Life Care & Spiritual Life  
The Mary Louise & Harold W. Shaw Endowment

### **LLANFAIR**

Anonymous  
The Anne Herget Endowment  
The Catherine K. Luedeke Memorial Endowment  
The Else L. Schulze Charitable Trust

### **MOUNT PLEASANT**

The Hampshire Buckley Endowment

The Mary H. Kittredge Endowment  
The V. Nadine & William B. Maitland Endowment  
The William T. & Oleta O. Maxwell Endowment  
The William C. & Janet A. Shannon Endowment

### **PARK VISTA**

The Anne Kilcawley Christman Endowment  
The Haynam Family Endowment  
The Kyle Family Charitable Gift Fund  
The William M. Neckerman, Jr. External Trust  
The Arnold D. & Helen R. Stambaugh  
Charitable Foundation

### **ROCKYNOL**

The John W. Frasche Endowment  
The Jerome Taylor Endowment  
The Helen E. Turner Endowment

### **SWAN CREEK**

The Loraine M. & Charles J. Moore Endowment  
The Reed Whole Person Wellness Endowment

### **WESTMINSTER-THURBER**

The John F. & Juliet S. Schoedinger Endowment



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*Where Donors Make A Lasting Impact*

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

Please contact us if you have any questions about charitable giving to OPRS Communities or Senior Independence.

**800-686-7800**

**[www.oprsfoundation.org](http://www.oprsfoundation.org)**

## **BOARD BIO: Get to know who's representing you**

**name:** Sandra M. Adam

**board position:** My term began in the summer of 2011. I serve on the Investment Committee and will be taking over as chair of the committee this summer.

**hometown:** I am Toledo born and raised, and am married to Paul, a Toledo firefighter.

**education:** I attended Notre Dame Academy and then The University of Toledo, where I graduated summa cum laude with a degree in public administration and a minor in gerontology. I've always connected with the elderly population and knew early on that

my career would include interaction with this generation. I also have an MBA from Heidelberg University in Tiffin, Ohio.

**career:** I joined Merrill Lynch in 2003 and am a vice president and CFP® professional. Prior to joining Merrill Lynch I had a career in planned giving and endowment.

**hobbies & interests:** My husband and I enjoy boating on Lake Erie, traveling and spending time with family and friends. I also like to run.

**relationship with OPRS:** I have a long history with OPRS. My grandfather, Bernie Zeiher, was actively involved with OPRS and **Swan Creek Retirement Village** through the local and corporate boards. In addition, I worked at Swan Creek while in college as a program services assistant, which included the role of bus driver! OPRS is a great organization with a strong resident- and employee-focused culture.

**my message to donors:** I believe you have to follow your passion when it comes to giving both your time and your money. I believe in "paying it forward" – not only for yourself, but for future generations as well. ■

**[www.oprsfoundation.org](http://www.oprsfoundation.org)**