

# 2018 Annual Report



## SAINT JOHN'S ON THE LAKE 1868-2018

LOOKING  
BACK ON  
**150**  
YEARS  
OF LOOKING  
FORWARD



# Year In Review



## REFLECTING ON OUR PAST, CREATING OUR FUTURE

By Renée Anderson, President

*Looking Back on 150 Years of Looking Forward*, the theme for Saint John's 150<sup>th</sup> Anniversary, clearly describes our experience this past year. 2018 was spent celebrating our long history of service to older adults in Milwaukee. We heard stories of multiple generations of families who called Saint John's home. We reminisced with retired employees, and shared memories with former Board members. We reconnected with our history reflecting on our growth from a small home on Sycamore Street to our current contemporary 5 acre campus.

At our Annual Meeting last May, we announced the donation of a park bench prominently positioned at the Brady Street entrance to the Oak Leaf Trail commemorating our 150<sup>th</sup> Anniversary. We contributed \$25,000 to the Milwaukee Public Library Foundation to support the acquisition of reading materials for the visually impaired. And we announced our intent to launch an Institute on Aging to create lasting solutions to the negative consequences of poverty, discrimination and chronic health conditions on older adults in the wider community. Our gifts represent our heartfelt gratitude to the City for its support in our success and represent our earnest interest in partnering with the community for the benefit of all who live and work in Milwaukee.

On June 17, the date of our founding, The Right Reverend Steven A. Miller presided over mass in the Chapel with assisting clergy: resident, The Reverend Joe Mazza; our former Chaplain, The Reverend Bob Woodbury; and our current Chaplain, The Reverend Jana Troutman-Miller. Following the service, Sunday brunch was served in the Museum Gallery.

Saint John's employees and their families enjoyed a BBQ lunch at the Wisconsin State Fair to commemorate our anniversary, and the community viewed with interest the anniversary exhibit in the Gallery while visiting during Historic Milwaukee, Inc. Doors Open.

In the midst of festivities, we broke ground and began construction on a replacement building for our care neighborhood residents and a new Tower to welcome 79 additional households to our family. This exciting project will unfold over 4 phases in the next two years. Upon completion, residents of the care neighborhoods – Windsor, Stratford and Canterbury – will enjoy generously proportioned private rooms with full bathrooms and large windows. Meals will be freshly prepared in an open kitchen on each floor where diners will experience tableside service. Residents will read, relax, visit and interact in living, library and lounge areas. Every floor will appreciate an outdoor terrace overlooking the plaza and Lake Michigan! The planning has been arduous and the plan approval process aggravating; Mother Nature has been less than cooperative and yet we've persevered. By year-end the foundation was in place and we were well on our way to the realization of a dream.

2018 was replete with celebration and change – we looked back on our accomplishments while looking forward to a bright future. The entire staff of Saint John's On The Lake is to be congratulated for their tenacity, continuing to provide seamless service to our residents and guests despite the impact of construction. I could not be more proud of their dedication, creativity and professionalism. I am also grateful to the Board of Directors for their visionary leadership and commitment to the advancement of best practice. Finally, it is our residents, the "why" behind all that we do, who most deserve acknowledgement; to each of you, thank you for your trust, for sharing your wisdom, and for your support as we embark on the next chapter in the life of Saint John's.

Gratefully,

A handwritten signature in black ink that reads "Renée E. Anderson". The signature is fluid and cursive, with the first name being particularly prominent.

Renée E. Anderson  
President & CEO



On the Cover and Above: 2018 was filled with 150-Year Celebrations for Residents, Staff, current and former Board Members, and the Greater Community.

# Dining Services

## SERVICE EXCELLENCE

By John Yonkee, Director of Dining Services



Jennifer Bates was promoted to a newly created position, Homemaker Manager; Jennifer offers the support necessary to consistently provide high quality service to our residents. We welcomed the return of Adam Cohen, Dietician, to partner with the culinary team in the design of nutritious menus for the Care Neighborhoods.

The Taylor's and Catering team continued to be fully engaged in working with residents and employees to plan and orchestrate the many special events that occurred this year. Splitting the Catering Lead and Lead Server positions has been a positive change. The new Catering Lead position, assumed by Cynthia Gaenslen, has provided us with a point person to oversee the setup and execution of events. Sandy Keomanivong was

promoted to the Lead Server position in Taylor's overseeing the service team. Dell Mercado continues to work with her team on continuous process improvement through regular training.

A year-long project was completed with the introduction of the new Taylor's menu covers. Months of research went into finding the right fit to fulfill residents' requests. We explored several vendors to find the perfect product while staying within budget.

Dining Services continues to offer opportunities for residents and employees to purchase fresh produce. This year we scheduled several "pop up" farmer's markets for the community helping the culinary team utilize the time-sensitive fresh produce received from the Clare Gardens Co-op.

The Bistro experienced many improvements this year based on resident feedback provided at focus group meetings held in late 2017. In the first quarter we redesigned the service area to improve efficiency. Signage was added to provide clearer ordering and payment directions and a second cash register was installed. A steamer oven was added to allow the Bistro staff to cook vegetables as needed. Residents have commented frequently about the improved quality of the vegetables. Another improvement this past year was the new Bistro chairs. It took many months of searching to find several options that fulfilled all the desired specifications. Residents were given the opportunity to voice their opinion and test the options. We received the selected chairs just before Christmas.

The Culinary team has seen changes as well. A Sous Chef position was developed to oversee the culinary staff in Taylor's kitchen and help the Executive Chef with projects and special events. Nakiesha Jones was promoted from Homemaker to Production Cook. The transition of David Piselli to Homemaker created an opening for a new Baker. Gabby Hansel joined us and has been creating a variety of desserts that have been well-received across campus.



Dining Services continues to strive for service excellence. The special dinner events in Taylor's, evolution of the Bistro and the beautiful decorations and delectable food offerings for catered events are just a few examples of the creativity of the team's work.



# Sales & Marketing

## BY THE NUMBERS

By Luci Klebar, Director of Sales and Marketing

Relationship building and pleasant, professional, persistent follow through delivered amazing results last year. Together, Beth and I completed the following in 2018:

- 2,174 Phone calls “dialed and smiled”
- 597 Tours and Appointments facilitated
- 19 Events hosted (16 for Charter Members)
- 48 New Shore Holders enrolled
- 21 Deposits secured (on a goal of 17)
- 18 families/households moved in

This means we converted 27.4% of our calls to appointments and “closed” 19% of our appointments with some level of future commitment to Saint John’s – Shore Holder, or Depositor on a future apartment home.

The Sales Team maintained 97% average occupancy for Central and South Towers and reservation levels at 100% average for 2018.

This activity generated Reservation Deposits and Entrance Fees of:

Central Tower Entrance Fees:	\$3,466,531
South Tower Entrance Fees:	\$1,305,420
North Tower Reservation Deposit:	\$1,231,700
Shore Holders Deposits:	\$ 120,000
Total Deposits and Entrance Fees:	\$6,123,632

Relationship building through referrals and our outstanding reputation continue to be our strongest sources for lead generation. Of the 266 new leads recorded last year, 70% were referrals from residents, friends, family and professionals. Reflecting the change in how people do their homework, 21% of new leads came from internet searches; the remaining 9% resulted from PR, advertising and signage.

When we began the year the new North Tower was 82% reserved, by November the North Tower was completely sold out!

Along with the day to day “dialing and smiling,” tours, appointments, and follow up, Marketing worked collaboratively with the Leadership Team and several residents to completely redesign and update Saint John’s website with a third-party web development company. We appreciate the time, attention and feedback many of you shared to help us improve our website.

We hosted 19 events of interest, for 1,191 people, 16 of which were exclusively to keep the North Tower Depositors, known as the Charter Club, engaged and informed about the project.



Celebrations continued with DOORS OPEN in September; the event was a huge success showcasing our 150-year history in the MOWA Gallery. For two days, with the help of resident and staff volunteers, we hosted 310 people for tours.

The first tenet of Saint John’s principles and values for Community Living:

“Relationships between residents, family, and staff are the foundation for the Saint John’s community.” Relationships are fundamental to everything we do.

Sales do not occur in a vacuum. We achieved the success with occupancy, reservations, and Shore Holder’s Club Members with the help of residents, Facilities Management, LifeStreams, Dining and Catering, Finance and Health Services. And of course our front door ambassadors, the “special forces” of Resident Services. From greeting and welcoming guests to their help and support with special and day-to-day projects they complete for us.

I feel privileged to be part of Saint John’s.



You can watch the North Tower construction as it happens by going to [www.SaintJohnsMilw.org](http://www.SaintJohnsMilw.org) and “Clicking” on the Live Construction Camera icon at the bottom of our homepage.

# LifeStreams



## A REWARDING YEAR

By Donna Spars, Vice President of Lifestyle

In 2018, the LifeStreams team provided a rich and comprehensive array of programs in all six dimensions of wellness – physical, social, spiritual, intellectual, vocational and emotional – and in all of the neighborhoods. We worked in conjunction with many colleagues to produce the second Spirituality and Aging Symposium as well as the many events marking Saint John’s historic 150<sup>th</sup> Anniversary. In addition, team members continued to offer educational opportunities to employees and gave back to the greater community by providing internships to high school and college students, through public speaking, and by holding leadership positions.

The Tower LifeStreams staff offered over 1,747 regularly scheduled and more than 466 special events during the year. A number of new ongoing offerings

debuted in 2018 including Milwaukee Art Museum curator lectures, Reader’s Theatre staged play readings by residents, John Gurda lectures, resident-led exploration trips of the Milwaukee County parks, Saint John’s Reads campus-wide book reading and discussions and the Milwaukee Repertory Theatre Song Series. As in past years, much of the credit for the richness of the offerings is due to the many residents who presented or organized events or sometimes a series of events.



The staff in the care neighborhoods offered over 2,808 regularly scheduled events over the course of the year along with 24 special events. Angela Titus, along with her team of Anne Luther, Jessy Hewitt and Sharla Quinn work creatively every month to ensure a variety of offerings that covered all six dimensions and met the variety of abilities and interests of the residents living in Windsor, Stratford and Canterbury.

2018 was the second year for the highly successfully *The Measure of Our Days: Finding Hope in Aging, Loss and Death* symposium organized by resident Kent Mayfield with assistance from Chaplain Jana Troutman-Miller, Lori McGinnis, Kate Steinbach, Luci Klebar, myself and others. The Philanthropy team of Sybil Bell and Mary Przybylski raised significant funds from residents and corporate sponsors to underwrite expenses.

The festivities marking Saint John’s 150<sup>th</sup> Anniversary included a very special Annual Meeting attended by many former board members. The spring/summer exhibit in the MOWA gallery highlighted images, quotes and stories from our past, present and planned future as well as a showcase of artifacts collected and displayed by residents of the Archives Committee. On June 17, our actual anniversary date, Bishop Steven Miller was the officiant at a celebratory Holy Eucharist followed by brunch. Employees marked the occasion at the State Fair with a catered picnic and complimentary admission for them and their family members.



Photos: #1 Residents enjoy monthly visits from Toddlers On A Mission; #2 Team Saint John’s SPARKlers participates in the Annual Walk to End Alzheimer’s; #3 Resident Cast and Director of Reader’s Theatre’s performance of *Laugh Lines*; #4 The musical group, Hothead Caravan, performed at the Tower Resident Holiday Party.

# LifeStreams

Angela utilized her extensive Positive Approaches to Care training in working with people living with dementia through developing and presenting workshops for the homemakers, salon stylists and nursing staff. She also provided training for residents' family member and for Saint John's volunteers on dementia. Angela, Anne and Jessy also led three Memory Café programs in various areas of Milwaukee. Memory Cafes are a place where people with memory loss and their care companions can come together in a safe place to enjoy conversation, art, music or other creative offerings.

Dodie Novak, Fitness Manager and Samantha Goeller, Fitness Specialist worked together to provide employee wellness information and activities organized quarterly around a theme. In 2018 the quarterly intensives were sleep wellness, physical fitness, nutrition/weight management and stress management/meditation. Personal training was also offered to all employees as well as several classes.

In terms of experience and internships, the care neighborhood staff continues to offer two Marquette University High School students an opportunity to fulfill their two week volunteer requirement at Saint John's every year. We also participate in the Student Artist in Resident (SAIR) internship program. This program offers a UW-Milwaukee art student an opportunity to add demonstrated use of their skills in the workplace to their resume in exchange for creating and leading four hands-on programs for residents. Dodie Novak, Fitness Manager, continued her practice of supervising an exercise physiology intern from Marquette University. This year that occurred in the fall semester.

LifeStreams team members shared their knowledge and experience at national and state conferences in 2018. Chaplain Jana spoke at the Haden Institute in Canada on the Spirituality of Death and Grief and at All Saints Cathedral on Spirituality and Retirement. Angela and Jessy spoke at the SPARK! conference on working with people living with dementia and on creative engagement. SPARK! offers people living with dementia and their caregivers an opportunity to enjoy and make art in a comfortable setting.

And finally in terms of leadership, Chaplain Jana is a board member for the Association of Professional Chaplains (APC) as well as Chair of the APC Commission on Certification. Angela is a member of the board of the SPARK! Alliance. Anne is the president of the Milwaukee Area Activity Professionals. And, I am co-chair of the advisory board at James Madison Academic Campus, a Milwaukee public high school.

It was a full and rewarding year for the LifeStreams' staff with opportunities to provide high quality programs, often in the Towers by working with resident partners, and through offering educational opportunities for students, peers, residents and members of the greater community. And, the celebrations that occurred throughout the year honoring Saint John's 150<sup>th</sup> Anniversary made for a particularly memorable year.



**Photos: #5** Every year, Tower Holiday Party-Goers enjoy cocktails, dinner and entertainment; **#6** Friendships grow among Saint John's residents; **#7** Afternoon Music is a beautifully orchestrated partnership between residents and staff. **#8** Volunteer staff members throughout the campus make up the fun-loving Employee Holiday Party Committee.

# Nursing Services



## CHANGES RESULT IN EFFICIENCY

By Mary Milliren, MS, RN – Vice President of Health Services

In 2018, many changes occurred in the depth and breadth of health services provided to our residents. Abby Neuberger and Mary-Kate Uy, our Nurse Practitioners who manage services provided in the Clinic joined the medical staff at Columbia-St. Mary's. This allows them to follow the progress of our residents while they are hospitalized so that they can proactively plan for their return to Saint John's. Brittany Vana was promoted to Nurse Manager after obtaining licensure as a Registered Nurse. She works closely with our Nurse Practitioners managing the health care services provided in Tower apartments, oversees transportation and assists with data collection and compliance.

Two significant process improvement projects occurred in 2018. The first involved service delivery by Wisconsin Diagnostic Laboratories (WDL). Rather than visiting Saint John's multiple times per week, unannounced and typically at inconvenient hours, we identified a specific day of the week and time of the day for lab draws for Tower residents. In August, we implemented a lab day on Wednesdays in the morning. While there were a few hiccups in the beginning, the result is improved satisfaction with lab services and increased work flow efficiency for the lab.

The second process improvement project concerned pharmacy services for both the Health Center and Tower residents who have medication management services through the Clinic. After careful thought and consideration, we transitioned from Omnicare to Phillips LTC Pharmacy. The most exciting aspect of this change is that Phillips has established a remote dispensing unit (MDU) on the second floor at Saint John's. Having a dispensing unit onsite allows us to more quickly implement medication orders. The change to Phillips has resulted in improved efficiency in medication administration and lower medication costs for our residents. In 2019, Phillips will expand services to all Tower residents upon request.



## Meet Our Medical Resource Center Team:

(Left to Right)  
**Brittany Vana,**  
Nurse Manager

**Ariana Mercado,**  
Clinic Coordinator

**Mary-Kate Uy,**  
Nurse Practitioner

**Abby Neuberger,**  
Nurse Practitioner

# Care Neighborhoods

## PROCESS IMPROVEMENT

By John George, Health Care Administrator

In 2018, the Care Neighborhoods implemented several Process Improvement Projects (PIP). One project in particular bears highlighting as it has resulted in significant improvements in the area of resident safety. In July, an interdisciplinary, cross-departmental PIP team was formed, led by Nursing Supervisor Erika Stoving. The team's focus was to reduce the number of resident falls on Windsor and Stratford Courts. It should be noted that a fall is defined as an unexpected change in elevation, meaning that lowering a resident to the floor is viewed the same as a slip, trip or fall.

The committee set a threshold of no more than 15 falls per month for Windsor and Stratford residents combined. The strategy used to achieve this goal was to implement the Purple Star Program designed to heighten awareness of a resident who has a high risk of falling and implement a post-fall huddle where factors contributing to the event are reviewed and a plan to prevent another fall is developed immediately.

After only a few months, the team noticed a significant reduction in the number of falls. In fact, falls in total were reduced by 50% by year's end. Based on this success, Canterbury implemented the Purple Star Program and has seen similar positive results. The Windsor, Stratford and Canterbury Care Neighborhoods will continue to seek out other opportunities to improve the care and service provided to our residents.



Again this year, Saint John's has achieved an impressive 5-Star rating! This information is available on the Medicare Website ([www.Medicare.gov](http://www.Medicare.gov))



As a skilled nursing facility, Windsor and Stratford undergo an annual survey conducted by the State of Wisconsin on behalf of Medicare. In 2018, our survey occurred in October. This year, the survey process was new as the surveyors gathered a lot of data before arriving at Saint John's and while here, they focused mostly on their observations of care and resident satisfaction interviews. The result was that we received a few minor citations, most of which were corrected before the surveyors concluded their visit.

Canterbury Court is also periodically surveyed. Most Assisted Living communities are surveyed every three years and for Canterbury, based on our very positive survey history, we are surveyed about every five years. We do not anticipate a visit until about 2022.



# Human Resources



## COMMITTED TO OUR EMPLOYEES

By Keshia Exum-Pryor, Director of Human Resources (HR)

I joined Saint John's in July after 8 years as the Director of HR for a manufacturer – I believe I've found my calling working for a not-for-profit serving older adults. I've been impressed by the culture here and I am excited by the opportunity to influence the future of the organization through talent acquisition and ongoing improvement in employee satisfaction.

## News from the HR Team

Richelle Snyder, Payroll & Benefits Administrator, received a scholarship in August with a goal of becoming a Certified Payroll Professional. Diane Jock, Recruiter, resigned after 7 years to pursue other opportunities and Mariann Forsythe retired as the HR Assistant after 12 years of service. These changes present a unique opportunity to evaluate the department, recasting positions to better align with current organizational needs.

## Recruiting

The HR department serves an average of 225 employees and is gearing up for the additional staff coming aboard with the addition of the North Tower. The HR Department processed 3,276 applications, hired 85 employees and transferred/promoted 29 employees. We have created a retention and recruitment committee to address the difficult job market and discuss ways to continue to keep our staff engaged.

## Human Resources Information System (HRIS)

The HR staff successfully implemented the first online benefit enrollment last year which resulted in 100% participation. Moreover, the Paylocity system now allows managers to schedule, access their employees' payroll records and oversee and approve their employee's timecards. Paylocity also creates better reporting options to assist the HR department with metrics such as turnover and retention.



Saint John's celebrates employees for their years of dedicated service to our residents!

## Engagement/Training

We believe a great place to work is only as good as the people working there. Therefore, it is important to us to invest in one of our most precious assets – our employees. As result, we have partnered with MRA, an organization providing Human Resources support, to assist staff with recruitment, retention, engagement and training. MRA provides training courses, policy and procedures templates and human resources advisors to assist with day-to-day questions to enhance the skills of our staff. Lynn Pronchinski, Education Manager, is revamping our approach to annual inservices balancing online learning with in-person opportunities. Furthermore, Saint John's has committed to implementing a Management Development Plan for managers to enhance and maintain their management skills.

## Safety

Saint John's safety record is stellar and the plan is to keep it that way! Safety is everyone's responsibility and we want to ensure employees and residents are aware of any safety concerns especially during transition to the new building. The safety committee has been revived as a proactive measure.

## Looking Forward

We are excited for what lies ahead as the Human Resources Department focuses on transformation and the continuation of staff development.

# Facilities Management

## NEW BEGINNINGS

By Mike Lingle, Vice President of Facilities Management

Whereas 2017 was filled with planning for the future, 2018 was filled with new beginnings for Facilities Management (FM).

**Beginnings in Management:** Maggie Monson was welcomed to the FM umbrella as the Move Coordinator. This realignment brings the work Maggie does to facilitate apartment customizations, refurbs, refreshes and moves closer to those responsible for maintaining the facilities overall. It has yielded improved communications, effectiveness and efficiencies in the move process. This was the first full year of service for our Housekeeping Manager Elizabeth “Lizzie” Cook. Saint John’s was successful at luring Lizzie away from the Marriott Hotel. She brought with her a fresh set of eyes, knowledge base and motivation for seeing Housekeeping at Saint John’s improve. No surprise, one of the first projects Lizzie was tasked with was improving the quality of care being provided to our guest rooms. Since then, we have seen Lizzie implement new processes for cleaning and become actively involved with various committees throughout Saint John’s. John Calderon took over the reins of Maintenance Manager and strengthened the Department with over 20 years of maintenance experience. Early on it became evident that John had taken ownership of his responsibilities and would prove to be a valued partner in moving the quality of facility care forward.



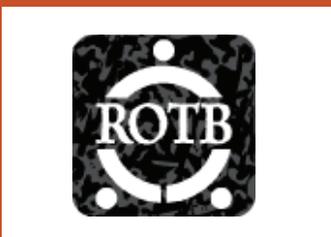
**Beginnings in Maintenance:** A significant reorganization of our Maintenance Department was approved to proceed in 2018 with a goal to see the new plan fully implemented by November of 2019. This reorganization includes the establishment of two internal divisions – a service division and a maintenance division. The personnel within the service division will focus on services provided through the Maintenance Department that do not involve work on the buildings. Examples of these services include: set-ups, moving of furnishings, warehousing, picture hanging, seasonal decorations, dumpster service, recycling program, vehicle fleet care, garage care and snow removal. As a result, the maintenance division will be able to stay more focused on the actual care of the buildings. Further, the maintenance division will start being staffed by skilled trades on 1<sup>st</sup> shift including an HVAC Technician, a Plumber, a Painter and an Appliance Technician. Finally, when fully implemented, there will be a minimum of two Maintenance Department personnel on staff every shift, 7 days per week, one from each division.

**Beginnings in Construction:** New construction work posed a significant impact to Facilities Management in 2018. A site management plan was implemented including the establishment of a security post in the South Tower parking lot. Utility and egress adjustments had to be made within the Health Care Building which included two campus-wide power outages. One of two emergency generators was decommissioned and, through the efforts of resident John Armbruster, found itself headed to the Dominican Republic for continued service. Residents and staff have been kept informed and engaged with the project via weekly Construction Updates.

**Beginnings in Security:** Phase 1 of Door Access Control (DAC) was implemented late in 2018. DAC replaces keypads, combinations and keyed cylinders with credential readers. DAC will improve the security and operations of Saint John’s. DAC will alert the Maintenance Department if certain doors are left unsecured in addition to allowing doors to be remotely controlled. The ability for contractors, delivery personnel and terminated employees to access our facilities without approval has been vastly reduced. If a credential is lost or stolen it can be deactivated within moments by our resident service desk specialists. Over the next four years all of the existing doors in the Central and South Towers that are routinely locked will be equipped with DAC credential readers.

Solomon wrote “Better is the end of something than the beginning.” This being the case then, the Saint John’s community has much to look forward to. Facilities Management is working on your behalf to ensure that you are not disappointed.

# Community Impact...



## 2018 REPORT ON COMMUNITY IMPACT

Saint John's was founded 150 years ago as an outreach mission of the Episcopal parishes of downtown Milwaukee acknowledging unmet needs in the community. Our mission of service to older adults continues today enhanced by a wide range of partnerships and newly launched initiatives. In 2018 Saint John's invested nearly \$946,000 to positively impact aging and aging services in our community.

### Charitable Care

Saint John's person-centered culture ensures residents, regardless of resources, continue to live in their home for the rest of their lives. Financial support from Saint John's is extended to residents, living anywhere on campus, whose personal resources can no longer fully cover their residency costs. In addition to benevolent assistance, Saint John's participates in the Medicaid program accepting reimbursement rates far below actual costs of care for enrolled residents living in skilled nursing. Charitable care in 2018 totaled \$859,000.

	2018	2017	2016	2015
Benevolent Support	\$202,000	\$94,000	\$103,000	\$143,000
Medicaid Shortfall	\$657,000	\$418,000	\$409,000	\$443,000
<b>TOTAL CONTRIBUTION</b>	<b>\$859,000</b>	<b>\$512,000</b>	<b>\$512,000</b>	<b>\$586,000</b>

### Workforce Development to Serve Older Adults

As the gap between the number of older adults and those working in aging services continues to widen, Saint John's remains steadfast in our commitment to directly and indirectly support the development and education of persons to serve older adults.

Internally, our robust scholarship program, funded from the proceeds of the thriving Thrift Shoppe and the popularity of Pop Up Sales, supports current employees enrolled in degree and certificate programs. Educational pursuits for the attainment of knowledge in any field qualify, and applicants are not required to continue employment at Saint John's upon completion of their schooling. We believe a positive employment experience will lead our scholars back to us as their careers advance and keep them connected through referrals of family and friends to live, work or volunteer on our campus. In 2018, 12 employees were awarded \$17,650.

Additionally, Saint John's supported 10 students with tuition reimbursement for 17 semesters of classwork totaling \$15,800. Employees are eligible for tuition reimbursement for study in a field related to their current or desired position at Saint John's. Most notably, 3 certified nursing assistants (CNA's – we call them Resident Assistants) are in their second year of study to become Licensed Practical Nurses. The program in which they are enrolled was created through a collaboration of local retirement communities and MATC. All enrollees are employed so the class is structured to accommodate work schedules and designed to build upon the base of knowledge enjoyed by a seasoned caregiver. Students are encouraged by their peers, supervisors and residents as we eagerly await their graduation in 2020.

Ongoing partnerships with local colleges, universities and technical schools brought more than 40 students studying nursing, social work, exercise physiology and

administration to campus to fulfill internships, clinical rotations and practicums. In order to ensure a meaningful experience for the students, staff partners dedicated more than 1,200 hours of time during their workday to supporting the curriculum and fulfilling the course objectives.

Several employees are involved in community initiatives to further education, most specifically with students pursuing education in a health related field. Our objective is to introduce aging services and the opportunity to pursue a rewarding and meaningful career working with older adults. Donna Spars co-chairs the Advisory Board at James Madison High School Academy of Health Sciences which offers work internships leading to employment in the health sector. Angela Titus, LifeStreams Manager, served as a board member. In addition to Donna and Angela, other staff members and residents have been involved with James Madison, speaking in classrooms and offering feedback, encouragement and coaching to students on their year-end projects.



2018 Aged to Perfection Class Photo

Now in year four, Aged To Perfection, an undergraduate college course co-created by our residents, staff and UWM faculty, and imbedded on our campus, has been expanded to include an online course. The course was carefully designed, based on research, to encourage students to choose careers working with older adults by understanding successful aging and experiencing it first-hand. The class is required for students pursuing a certificate in Healthy Aging; 34 enrollees participated in the in-person and on-line classes in 2018.

### Support of Dementia Education, Research, and those living with Dementia

Saint John's has a long standing relationship with the Alzheimer's Association. Each spring we support and attend their Gala fundraiser. Each fall, our team, the SPARKlers, participates in the Alzheimer's Annual Walk. This year, between the Walk sponsorship and fundraising we donated over \$3,000 for research and education. Additional support was contributed through the sale of Tank's Tasty Treats, dog snacks made by residents and sold in The Bistro!

Angela Titus, LifeStreams Manager, led the Alzheimer's Poetry Project and administered *Memories In The Making* which uses art as an expressive outlet for those individuals with dementia. Saint John's is the monthly site for the gathering of an Alzheimer's Association's local support group, offering a place to talk about caregiving challenges and to share a cup of coffee. SPARK! is a cultural arts program using hands-on activities, art exhibits and field trips to art museums to engage persons with dementia and their caregivers in meaningful interactions. In this fourth year of sponsorship, Saint John's welcomed 16 participants, both residents and community members, who engaged monthly with the assistance of staff and volunteers.



(left to right): Knit Wits knitting group; Participant of a SPARK! session; and Saint John's announces Institute On Aging at the Annual Meeting.

## Support of the Basic Health Needs of Older Adults in the Community

Saint John's Communities Foundation Board stewards a fund for the Visually Impaired which promotes grants to local agencies whose mission is to serve older adults with vision challenges. In 2018, three organizations received awards totaling \$7,500 to continue their work offering supportive vision services in the Milwaukee community.

Worthy recipients included:

- ABLE: Audio & Braille Literacy Enhancement provides alternative ways for people with print-disabilities to read.
- Center for Deaf-Blind Persons provides services needed to minimize the devastating effects of a combined vision and hearing loss upon the individual and family.
- VisionFORWARD serves to empower, educate, and enhance the lives of individuals impacted by vision loss through all of life's transitions.

Since the inception of this Fund in 2005, a total of nearly \$112,000 has been awarded to support the operations of qualifying agencies. Financial contributions were made to Unison and Eastside Senior Service, two organizations working in Milwaukee to address the needs of older adults who choose to age in their own homes with assistance. Again this year we sponsored the Annual NAMI (National Alliance on Mental Illness) Walk. Now in its 16<sup>th</sup> year, the goal of the walk is to raise awareness for mental health.

## Diversity and Inclusion Commitment

Saint John's recognized the 50<sup>th</sup> Anniversary of the fair housing marches of 1967-1968 through development and presentation of a panel discussion, in partnership with Milwaukee Neighborhood News Service (Milwaukee NNS), entitled "Economic Development Without Displacement: Easier Said Than Done?" Panelists were Joaquin Altoro, Vice President of Commercial Banking, Town Bank; Kalan Haywood, Sr., President, Haywood Group, LLC; Keith Stanley, Executive Director, Near West Side Partners; and Donsia Strong Hill, Executive Director, Local Initiatives Support Corporation (LISC). Sharon McGowan, Editor, Milwaukee NNS, moderated the discussion. The panel, held at Milwaukee Center for Independence, was attended by 60 people with more viewing the discussion via live stream. Additional lectures on the work of an individual and two non-profit organizations to assess the current status of housing discrimination and provide means to either correct it or alleviate its consequences, were held at Saint John's and were open to the public.



Seeking to expand our awareness of and opportunity to impact segregation and social injustices related to race in the City of Milwaukee, Saint John's made a donation to the re-opening of America's Black Holocaust Museum. Residents and staff attended the celebration and look forward to continued involvement with the Museum and related initiatives.

We believe strongly in equality for all, and are one of the few retirement communities in Milwaukee to openly embrace same sex couples. LGBTQ older adults often face challenges finding housing and exercising control over their health care decisions because of non-traditional relationships. Saint John's provides financial support to several organizations invested in breaking down barriers so that all may age well.

## Paying It Forward

Saint John's residents are often the catalyst for new outreach, identifying needs and aligning resources. Their caring, connections and generosity of spirit are reinforced by their personal contributions of time, talent and financial means. Two unique situations occurred this year, while numerous ongoing initiatives continued to be supported.

Tony Busalacchi, in celebration of his 85<sup>th</sup> birthday, decided to sell 85 pieces of his and Pat's considerable art collection, and donate the proceeds to help furnish apartments at Capuchin Community Services' St. Anthony Apartments, a new residence for people previously homeless and chronically poor. In March, Saint John's hosted an art sale which

# ...Community Impact

garnered so much attention that donations poured in long after, and, as a result of national television coverage, from all over the country. In total, more than \$42,000 was raised, enough to furnish 42 of the 60 apartments at St. Anthony's!



When Central Tower resident John Armbruster learned we were replacing the generator which had served to provide emergency power to the care neighborhoods, he sprang into action. John has a history of connecting used equipment with underserved communities in the Dominican Republic through his relationship with the Dominican Episcopal Diocese.

Years ago, when John and Mary were living in South Carolina, John facilitated the donation of a retired Door County firetruck. John coordinated an inspection of the equipment to ensure it was in good repair and would remain serviceable, identified a need in the diocese and proceeded to make arrangements to have our old generator packed and trucked to Miami and then shipped to the Dominican Republic. He and Chaplain Jana Troutman-Miller raised the funds needed for transportation by soliciting chapel parishioners and specific individuals.

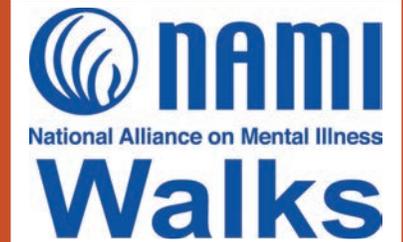
Efforts which continue each year include collection and delivery of food donated to Riverwest Food Pantry and Cathedral Square Women's Shelter; of gently used clothing, bedding and towels to Repairers of the Breach; and of unsold furniture and household items from our Thrift Shoppe to the International Institute of Wisconsin in support of refugees who are seeking to establish households and new lives in the Milwaukee area.

Our resident knitters, the self-proclaimed Knit Wits, meet every Tuesday afternoon to chat and knit in the sunshine of the MOWA gallery. The hats, scarves and mittens they create are given to Milwaukee Public Schools for distribution to homeless families.

Lightly used cabinets, countertop and appliances available as a result of apartment renovations are taken to Habitat for Humanity to be repurposed in homes being constructed in the inner city for low income families. Various organizations are recipients of used equipment, furniture and supplies. For example, this year, remaining Bistro chairs were donated to Goodwill.

For the last 11 years, Saint John's has been an outbound site for Our Next Generation (ONG), an organization that provides academic support and enrichment programs for students, kindergarten through high school, in central Milwaukee. The program exposes students to a variety of professional environments and potential career paths, while simultaneously providing them with one-on-one academic support and meaningful relationships with mentors. Mondays, students come to Saint John's and on Tuesdays, volunteers are bused to ONG for 1:1 tutoring opportunities.

Saint John's has sponsored a United Way campaign for employees for many years. In 2014, we partnered with Pat and Allen Reiselbach who promoted the campaign with residents. Combining the results creates a powerful statement about the generosity of the community of Saint John's – in 2018, a total of 77 employees and 69 residents contributed nearly \$163,000!



# Finance



## 2018: THE FINANCIAL TRANSITION BEGINS

By Dan Lemminger, Vice President of Administration

Saint John's historical 2018 ground-breaking for the Health Center replacement and Independent Living apartment expansion project ("the project") signified the commencement of a corresponding "financial transition" the organization will navigate during the period of construction and post-construction. In 2018 Saint John's:

- Issued bonds totaling \$135.6 million to finance the project
- Expended approximately \$1.6 million on continued design & related project costs representing the remaining ~25% of the organization's planned equity contribution
- Reported accelerated depreciation of \$3.7 million for the anticipated replacement of the Health Center.

The project did not distract as Saint John's 2018 operational performance remained strong, primarily driven by robust Tower apartment and Canterbury Assisted Living occupancy measuring 97% each. Furthermore, actual 2018 expenses remained on par with budget. These results mitigated occupancy challenges within Windsor & Stratford Skilled Nursing which finished the year at 83% occupied.

The investment markets experienced their own transition - from nine successive years of positive returns to the first decrease in returns since 2008<sup>1</sup>. The Saint John's investment portfolio has ridden this investment market "wave," experiencing a 10-year return of 8.45% and a 2018 return of -5.1%. The Foundation's investment portfolio experienced a similar fate with a 2018 return of -7.7%. A long-term investment strategy combined with strategic diversification adequately positions Saint John's and the Foundation portfolios to withstand these market fluctuations.

As anticipated, in March Saint John's BBB+ credit rating was downgraded to BBB- reflecting Saint John's increased project-driven debt burden. The rating included a "Stable Outlook" designation which acknowledges Saint John's consistently strong operating results. Saint John's remains one of only two investment-grade rated senior living communities in Wisconsin.

As a registered 501(c)(3) not-for-profit corporation with no one person or group of shareholders listed as "owners" of Saint John's, there are no ownership dividends to pay allowing the corporation's profits to be re-invested in the community. In 2018, Saint John's continued to reinvest in its most valuable resource – its staff – through competitive wage increases averaging 4.4% with particular emphasis on CNA wage rates, continuation of very affordable health insurance, and significant investment in staff education & professional development.

On March 19, 2019, A.V. Powell & Associates LLC issued its Actuarial Compilation Report, concluding that Saint John's has sufficient financial reserves in place to fund future health care contractual obligations to its residents. Saint John's was successful in maintaining its strong actuarial position by balancing continual direct-care cost growth with cost containment measures in other operational areas and 2018's 3% resident rate increase, as recommended by the actuary.

On April 9, 2019, Wipfli issued an unqualified audit opinion, opining that the 12/31/18 financial statements "present fairly, in all material respects, the financial position of Saint John's Communities, Inc. and Subsidiary." Saint John's current financial horizon remains in focus as the organization sets a course for the next chapter in the Saint John's story. Our fiscal mission today and always: to preserve Saint John's financial health for current and future generations of Saint John's residents through fiscally responsible decision-making and efficient utilization of the organization's resources.

**Note to Readers:** In 2015 a financial reporting policy was adopted by Saint John's Communities, Inc. and Saint John's Communities Foundation, Inc. for the Independent Auditor's Report which requires financial results be presented on a "consolidated" basis. As a result, the Independent Auditor's Report financial presentation varies from the Saint John's internal financial reporting. However, net assets, net income (loss), and net cash flow remain consistent between presentations.

<sup>1</sup> Marquette Associates 4Q 2018 Market Environment – S&P 500 maximum market drawdown

# Finance

## BALANCE SHEETS / DECEMBER 31, 2018 & 2017

	<u>2018</u>	<u>2017</u>
<b>ASSETS</b>		
TOTAL CURRENT ASSETS	6,455,083	5,917,545
PLEDGES RECEIVABLE	0	0
INVESTMENTS	108,264,637	42,345,704
PROPERTY, PLANT & EQUIPMENT, NET	92,771,344	79,218,158
DEFERRED FINANCING AND MARKETING FEES	2,654,136	1,796,546
INTEREST IN SAINT JOHN'S COMMUNITIES FOUNDATION	6,945,736	7,435,109
INTEREST IN SUBSIDIARY	74,998	74,998
<b>TOTAL ASSETS</b>	<b>217,165,934</b>	<b>136,788,060</b>
<b>LIABILITIES AND NET ASSETS</b>		
TOTAL CURRENT LIABILITIES	11,189,129	9,485,892
DEFERRED REVENUE	58,673,985	57,822,333
LONG-TERM DEBT	138,693,752	53,246,211
<b>TOTAL LIABILITIES</b>	<b>208,556,866</b>	<b>120,554,436</b>
<b>NET ASSETS</b>	<b>8,609,068</b>	<b>16,233,624</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>217,165,934</b>	<b>136,788,060</b>

## STATEMENTS OF OPERATIONS / YEARS ENDED DECEMBER 31, 2018 & 2017

	<u>2018</u>	<u>2017</u>
<b>REVENUE, GAINS AND OTHER SUPPORT</b>		
TOTAL RESIDENT REVENUE	18,075,197	18,378,287
INVESTMENT INCOME	2,260,026	1,561,675
UNRESTRICTED CONTRIBUTIONS	149,536	148,489
OTHER	1,607,276	1,543,417
<b>TOTAL REVENUE, GAINS AND OTHER SUPPORT</b>	<b>22,092,035</b>	<b>21,631,868</b>
<b>OPERATING EXPENSES</b>		
DIRECT CARE, SUPPORT SERVICES & ADMINISTRATION	14,991,361	14,305,063
INTEREST	1,966,077	1,913,867
<b>TOTAL OPERATING EXPENSES</b>	<b>16,957,438</b>	<b>16,218,930</b>
<b>GAIN (LOSS) FROM OPERATIONS</b>	<b>5,134,597</b>	<b>5,412,938</b>
CHANGE IN UNREALIZED GAINS & LOSSES	(4,130,448)	3,843,677
DEPRECIATION AND AMORTIZATION	(8,663,153)	(4,843,027)
GAIN ON DISPOSAL OF FIXED ASSET	197	0
<b>INCREASE (DECREASE) IN UNRESTRICTED NET ASSETS</b>	<b>(7,658,807)</b>	<b>4,413,588</b>
CHANGE IN RESTRICTED ACTIVITY	34,251	1,541,629
<b>CHANGE IN NET ASSETS</b>	<b>(7,624,556)</b>	<b>5,955,217</b>

An audited financial report is available upon request.

# Philanthropy

## A CULTURE OF PHILANTHROPY FOSTERS JOYFUL GIVING

By Sybil Bell, Director of Philanthropy



### 2018 CONTRIBUTIONS

Just as they were in our humble beginnings in 1868, Saint John's donors and volunteers remain as solid cornerstones of our vibrant and caring community. It is their continued generous support that brings us to our sound financial position today.

Contributions to Saint John's Communities in 2018 totaled nearly half a million dollars, with designations to many funds, including the Annual Fund, LifeStreams programming and the capital purchase of a replacement chapel organ. Of note is \$177,025 gifted to the Employee Holiday Fund – making a powerful statement from donors of appreciation for "service excellence" provided by staff. Charitable giving has increased annually as the culture of philanthropy message continues to be fostered.

Saint John's Communities Foundation was the recipient of \$306,797 in gifts with an additional \$66,640 in pledge payments. The Foundation's assets remained close to 2017's value of about \$7M, including gifts, distributions and the market correction at year-end 2018.

In this 150<sup>th</sup> Anniversary year, the launch and completion of *The Campaign to Make a Joyful Noise!* raised more than \$90,000 to replace the chapel organ that was more than 30 years old. The fundraising success was realized early and the organ installation occurred in late September, in time for musical presentations and holiday services. A debut concert with nationally-acclaimed organist Michael Hey took place in early 2019. A joyful noise abounds as does our thanks to our supporters.

We are grateful to our founders, our residents, our volunteers, and all our donors whose generosity makes a profound statement on the belief in the power, the relevance, and the significance that charitable giving has to further excellence and knowledge at Saint John's.

Please note that the 2018 Saint John's Communities Foundation Annual Report is a separate document published concurrently with the Saint John's Communities Annual Report. There you will find a listing of all our contributors.

### 2<sup>nd</sup> ANNUAL SPIRITUALITY & AGING SYMPOSIUM

The purpose of our annual symposium is to advance the study of aging, to explore new learning of spirituality in older adults, and to nurture community at Saint John's. The 2<sup>nd</sup> Annual Spirituality & Aging Symposium featured notable professionals, faculty and authors in early March with 200 participants gathered to gain insights from life's challenging experiences.

Its theme, *The Measure of Our Days: Finding Hope in Aging, Loss and Death*, had wide appeal for those professionals who serve older clients, as well as our residents, board members and staff. Participants gained perspective into: understanding medical ethics and the psychosocial and existential aspects of aging, illness and dying; crafting positive attitudes, beliefs, practices and celebrations for growing old; and transforming grief and age-related loss into profoundly hopeful opportunities for growth.

Following the symposium, a two-day post-conference offered new knowledge to professionals whose highly diverse clients are encountering the challenges of end-of-life planning. We acknowledge, with gratitude, that the Symposium was made possible through the financial support from individual donors and corporate sponsors.



Symposium Co-Chair, Resident Kent Mayfield, Director of Philanthropy, Sybil Bell and Symposium Presenter Robert Weber, Ph.D.

# Philanthropy

## REASONS TO GATHER!

The Office of Philanthropy loves to celebrate, and each year we sponsor three events.

- In this 34<sup>th</sup> year of the Scholarship Awards Program, Saint John's helped student-employees advance their education with financial support. Revenue from Saint John's Thrift Shoppe and gifts to the Scholarship Endowment Fund has increased annually to keep pace with skyrocketing tuition rates. In August, awards of \$18,000 were granted to twelve qualified candidates at the festive ceremony. Family, co-workers and residents were all on-hand to applaud these ambitious learners. The Scholarship Committee with Lloyd Lewis, Mary McAndrews, Chuck Cruse, and staff members Sybil Bell and Mary Przybylski, were deeply encouraged by the applicants who juggle school, family, work, and so much more. We salute their ambitions and look forward to supporting employee scholars for years to come.
- Our September event acknowledged the contributions of those who give their time. The annual Volunteer Appreciation Event was, as always, a full house. Nearly 83% of Tower residents serve on 54 committees and in other volunteer positions to give time on campus. Many of these dedicated individuals also extend their outreach to other worthy organizations like Our Next Generation, Al's Run, Repairers of the Breach, the River West Food Pantry, the Alzheimer's Walk and the Milwaukee Art Museum, among others. We shout-out a big THANK YOU to our volunteers whose efforts greatly impact our community.
- Each November, the Foundation hosts a Legacy Society & Top Donor Event to honor those who have arranged for legacy gifts in their estate plans, as well as those donors whose lifetime giving exceeds \$10,000. The 2018 event brought 106 attendees together to hear our expression of heartfelt gratitude. At year's end, future legacy gifts totaled \$1,000,000 – remaining steady at 2017's value, as some were added and some were distributed – and climbing steadily from \$955,094 in 2016 and \$638,666 in 2015. Our donors make a powerful statement of philanthropic support by enriching the present and enhancing the future of Saint John's.



Scholarship Award Winner Richelle Snyder is grateful – her scholarship will help her become a Certified Payroll Professional.

## Saint John's Communities, Inc. Mission & Vision

### Our Mission

Our mission is to enrich the lives of older adults through gracious retirement living, spiritual growth, cultural and educational opportunities and health care services.

### Our Vision

- We will be a respected leader in the field of retirement living, anticipating and responding to the needs and expectations of our residents and clients through innovation and excellence in service.
  - We will provide a continuum of residential living and care options with dignity and compassion.
  - We will foster a community enriched by the diverse cultures of its board, residents and employees.
    - We will promote a work environment that attracts and retains employees dedicated to the highest professional standards.
  - We will achieve our goals and objectives through sound management of our financial resources.

## Saint John's Communities, Inc.

### Board Officers

Stephanie Sue Stein, Chair  
W. Stuart Parsons, Vice Chair  
Deborah G. Conta, Secretary  
John A. Mellowes, Treasurer

### Board Members

Kathy Armbruster  
Polly W. Beal  
Diane Beckley  
Lee Coppernoll  
John R. Dawson  
Rev. Seth Dietrich  
Sanford Fedderly, Resident  
Kathryn J. Housiaux  
David C. Kuehl  
The Rt. Rev. Steven A. Miller, Bishop  
of the Episcopal Diocese  
Judith T. Moon  
Mary Beth Petersen, Resident

### Corporate Officers

Renée Anderson, President & CEO  
Donna Spars, Vice President of Lifestyle

### Saint John's Leadership Team

Sybil Bell, Director of Philanthropy  
John George, Health Care Administrator  
Keshia Exum-Pryor, Director of Human Resources  
Luci Klebar, Director of Sales & Marketing  
Dan Lemminger, Vice President of Administration  
Mike Lingle, Vice President of Facilities  
Mary Milliren, Vice President of Health Services  
John Yonkee, Director of Dining Services

### Saint John's Communities Foundation, Inc. Board

Renée Anderson, President  
Sara E. (Patsy) Aster, Resident  
Sybil Bell, Secretary  
Polly W. Beal, Corporate Board Designee  
Susan Wright Brennan  
Dan Lemminger, Treasurer  
Alice P. (Lloyd) Lewis, Resident  
Richard H. Miller, Resident



North Tower Groundbreaking Ceremony with Mayor Tom Barrett and Members of the 2018 Saint John's Communities, Inc. Board.

### Ethics Committee

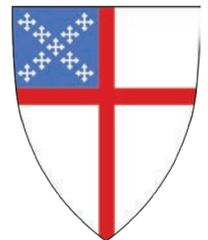
Jana Troutman-Miller, Chair  
Renée Anderson  
Patsy Aster  
Sybil Bell  
Meighan Bentz  
John George  
Susan Kopesky  
Mary Kunze  
Rose McMullen  
Mary Milliren  
John Sanidas, M.D.  
Kristen Tym  
Kathie Vint

### Resident Committee Chairs

Facilities: Tom Briscoe  
Food: Cheri McGrath  
Garden & Landscape: Susan Mazza  
Green: Sheila Larkin  
Health: Lloyd Lewis and  
Miriam Reading  
Library: Rita Rochte  
LifeStreams: Kent Mayfield  
Newcomers: Carol Ryan  
Nominating: Pat Busalacchi  
Volunteer: Angie Kopf  
*More of Our Story: Bobbie Schmitt*

### Tower Resident Council

Joanne Barndt, Chair  
Jeanne Durnford, Vice Chair  
Mary Ellen Winter, Secretary  
Virginia Brennan  
Pat Busalacchi  
Inez Gilbert  
Judith Goetz  
Joan Hardy  
Sue Hoaglund  
Barbara Kloman  
Richard Lindberg  
Anne Luber  
Mary McAndrews  
Connie McCarty  
Susan Oster  
Susan Ploetz  
Pat Rieselbach  
Wes Schaum  
Nici Teweles  
Martha Vogel



All Listings Current as of May 2019