2022 Annual Report



A Message from Renée



2022 saw a return to normalcy post COVID and construction. Residents embraced the opportunity to connect, again enjoying life in community. Those who moved to Saint John's during the pandemic began to realize and appreciate our community's lifestyle, meeting neighbors, sharing meals and partaking of our rich diversity of cultural and intellectual offerings.

The Symposium On Aging, our signature community outreach initiative, returned with record attendance by aging service professionals from southeast Wisconsin.

How refreshing to resume our focus on our core mission and re-engage with stakeholders in person!

We are indebted to our Board, residents, employees, families, donors and vendors for their contribution to making Saint John's an amazing place to live and work.

With gratitude,

Renée E. Anderson President & CEO



To discover more about life and careers at Saint John's, use the camera on your phone to scan this QR Code.

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 residential 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.

2022 Pet Show On The Plaza



I GREW UP AT SAINT JOHN'S

David Piselli has worn many hats over the years, most recently donning a skull cap as he prepares the delicious desserts served in Taylor's. David began his career at Saint John's in 1987 in the Maintenance department. From there he moved on to hold positions in our Home Health Agency, first manning the reception desk and then working in Human Resources. He later applied his skills at the one and only Tower reception desk, before returning to Maintenance.

In 2001, David left Saint John's amidst some personal turmoil. During his absence he enrolled in the baking program at MATC, where upon completion he was the graduation speaker.

During a chance encounter with his previous supervisor in 2003, David learned Saint John's was adding a bakery to our production kitchen, news which enticed him to return. He accepted a position in Maintenance while waiting for the bakery to be completed, juggled both jobs for a bit and ultimately settled into baking full-time.





Over the next 16 years, David broadened his culinary repertoire by serving two stints cooking in the care neighborhoods before returning to baking in 2019.

Throughout it all, he has been an exemplary team player, people pleaser and all-around nice guy. David is passionate about good food, especially sweet treats. He helped develop MATC's baking program, has served as an onsite instructor and brought students to Saint John's to complete their 80-hour required internships.

Each year at Christmas, he and his wife Melissa bake 12 varieties of cookies to share with friends and family.

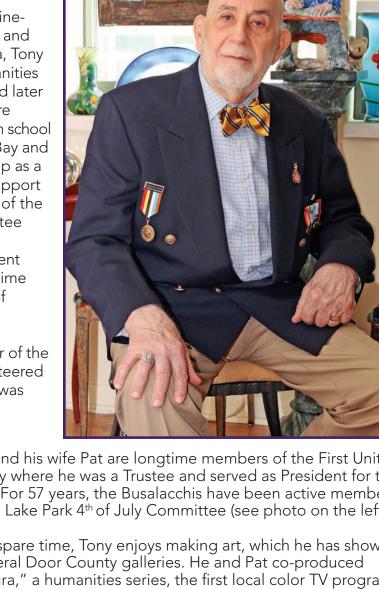
In his spare time, David enjoys photography, tinkering with electronics and caring for their 4 cats. Fun fact: David and Melissa have visited Walt Disney World 20 times!

OF COURSE I KNOW TONY!

Tony Busalacchi is a man about town – everybody knows Tony and Tony knows everybody – and for good reason; he has been exceptionally active in the City in a wide variety of roles.

Following service in the US Navy (on a minesweeper in Korea during the Korean War and later on a submarine) and college in Iowa, Tony returned to his hometown to teach humanities at the high school and university level and later older adults at Osher and the North Shore School for Seniors. He has been involved in school administration serving on the Whitefish Bay and Milwaukee School Boards; civic leadership as a Village Trustee for Whitefish Bay; and support of culture and the arts as Past President of the City of Milwaukee Art Commission, Trustee and Past President of The Friends of the Charles Allis, Co-founder and first President of the Milwaukee Opera Company, longtime Marcus PAC Board Trustee and Trustee of Milwaukee Public Museum

Tony is the Past Master and Current Chair of the Trustees of his Masonic Lodge. He volunteered at the VA Hospital for 11 years where he was the deputy Director of Masonic Services.





Tony and his wife Pat are longtime members of the First Unitarian Society where he was a Trustee and served as President for two years. For 57 years, the Busalacchis have been active members on the Lake Park 4th of July Committee (see photo on the left).

In his spare time, Tony enjoys making art, which he has shown in several Door County galleries. He and Pat co-produced "Cultura," a humanities series, the first local color TV program. Beginning in 2018 in celebration of his 85th birthday, Tony and Pat began selling their artwork – owned and created – to support furnishing St. Ben's and the House of Peace. To date they have raised over \$200,000!

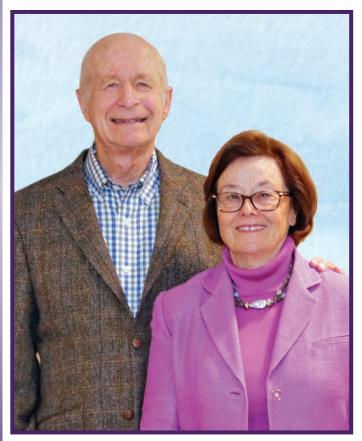
At Saint John's Tony is known for organizing both our Memorial Day and Veteran's Day celebrations as well as our annual making of Snow Angels on the Plaza.

In 1986, the Milwaukee Journal editorial page honored Tony as one of the "The Turtles of the Year" (Turtles stick their necks out), an appropriate appellation for this exceptional human being.

As Tony would say, Make it a Great Day!



Grateful



GENEROSITY ABOUNDS

Amidst the initial phase of the pandemic, **Kathie and Tony Asmuth** quietly moved to the North Tower. After a year of imposed restraint, they quickly identified opportunities to engage and support the community they now call home.

Kathie (along with resident Margot Paddock) was the impetus and expertise behind the North Tower lobby enhancements. Her keen eye created the comfortable, cozy greeting and seating space at modest cost, thanks to her longstanding relationships with vendors and offer of gratis design service.

Tony serves on Saint John's Foundation Board of Directors where he lends his skill as an attorney and his experience on both for-profit and charitable boards to steward our endowed funds.

Together, Kathie and Tony enjoy the fine arts, particularly classical music. They share this appreciation with fellow residents through their sponsorship of Charles Sullivan's Saturday piano and organ concerts.

The Asmuth's generosity enriches our lives.





GREEN THUMB

When **Mary Beth and Holger Petersen** moved to the South Tower in 2011, they left behind their gorgeous suburban gardens. Saddened by the loss and with time on his hands, Holger soon found an outlet to continue his passion for beautiful green space. As long-time chair of the Garden & Landscape committee, Holger contributed his considerable knowledge, personal financial resources and countless hours improving and maintaining the many gardens on our campus.

He singlehandedly planted, and for a decade maintained, the rose gardens in the raised beds along The Bistro and at the front door to the South Tower. It was Holger's idea to offer residents an opportunity to garden in raised beds. He purchased, assembled and maintained the trugs and created the lottery system assigning plots to gardeners.

Our long dark winters are more cheerful as a result of Holger's work installing and maintaining the decorative tree lighting found around campus. In 2014, beekeeping piqued Holger's interest



inspiring him to educate us on the benefits and allay our fears. We've been home to two hives ever since! In celebration of their 50th wedding anniversary, Holger and Mary Beth donated the gorgeous live plant walls in the North Atrium overlooking the Plaza, ensuring we are all able to enjoy lush green plants year-round.

Holger has passed the baton of committee leadership to Susan Mazza, and with growing trust in Tim Anderson, our landscape professional, he's finding more time to relax and travel with Mary Beth.

Holger, our grateful community thanks you for your enormous contribution.

COMMUNITY OUTREACH

Our Next Generation (ONG) is an after-school program headquartered at 35th and Lisbon in Milwaukee. It was started as the "Homework Club" by a group of men from Christ Church in Whitefish Bay led by Charlie Drake. (Charlie was a Saint John's resident in his later years.)

The residents of Saint John's were deeply involved with ONG before COVID struck, hosting an enrichment

program here at Saint John's on Monday afternoons and traveling to the Center on Tuesdays to tutor children there.

During the COVID school shutdown, ONG struggled to maintain contact with the children who had been part of the program. Now that schools are back in session, ONG is striving to rebuild their program and Saint John's residents are helping yet again. Angie Kopf is now leading the Monday afternoon program and although student attendance is spotty and transportation somewhat unsteady, various residents have come forward to share their knowledge and experience with the participating children. And a valiant contingent of Saint John's residents travel to the center on Tuesdays to engage with children there.



ONG is deeply grateful for the continuing support from Saint John's. Steps are being taken to rebuild ONG over the summer so the 2023-2024 school year sees many more children enrolled and several additional outbound programs in place. This year Saint John's is the only outbound program! And Saint John's residents are among very few tutors at the Center.

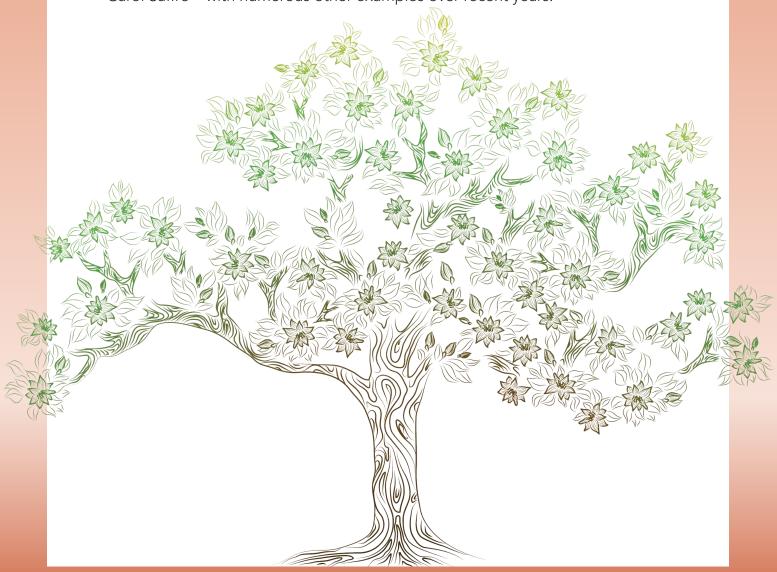


WE ARE FAMILY

In general, people tend to gravitate toward others who share their interests. Many who move here arrived at our doorstep because of a recommendation from a friend who lives at Saint John's. It is rare, but by no means uncommon, for multiple family members to live here though not always at the same time.

Sometimes, the situation is separated by generations. Resident Bob Taylor and his parents, Jan and Bob, Sr. (for whom Taylor's restaurant is named) and his grandmother Ora Taylor lived at Saint John's, Ora moving to Prospect Avenue from our prior location on Cass Street. Ardith Maney and Jim Friauf followed in their mothers' footsteps and Elizabeth Axelrod in her father's footsteps. Elizabeth Bradley, Loni & Bob Kagan, and Sandy & Kerry Van Kleeck are further examples of multi-generational families.

Currently, 4 pairs of siblings call Saint John's home – Kathy Kain and Marge Ryan, Connie Doerr and Jane Malone, Bill and Carol Carpenter, and Ellin Levy and Carol Saffro – with numerous other examples over recent years.



Community Impact...





















2022 REPORT ON COMMUNITY IMPACT

In 1868, Saint John's was founded 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 community partnerships to impact a broad spectrum of critical needs with a focus on aging and aging services.

Saint John's Communities Foundation Opens Community Impact Fund

Saint John's, as an organization and a cooperative of individuals, is dedicated to employing our resources to affect positive change. To ensure Saint John's community commitment in perpetuity, Donna Spars, retired Vice President and visionary volunteer, Kent Mayfield, seeded the **Community Impact Fund** in January 2022. Their nearly four years of exploration and the effects of the pandemic sharpened our focus and has defined a vision for Saint John's

community impact: to build capacity of organizations in the wider Community by supporting the creation of lasting solutions to the negative consequences of poverty, discrimination and chronic health conditions among older adults. We chart a course forward with clarity of purpose.



To learn more about Saint John's, Community Impact Fund scan this QR Code.

Building Capacity. Creating Lasting Solutions.

In 2022, Saint John's provided the funding for the following:

Following a one year pause during the pandemic, Saint John's welcomed more than 250 attendees to its campus for the 5th Annual Symposium On Aging – Connections: Embracing Change, Coming Together and Closing the Gap, A Symposium to Counter Social Isolation and Loneliness held April 7-9. The Symposium represents Saint John's signature Community Impact initiative demonstrating commitment to those professionals who work with older adults and to our residents' enrichment through the participation in lectures, workshops, table discussions and cultural experiences.

The Symposium featured a premiere screening of the documentary, **All the Lonely People**. As a funding sponsor of this documentary, Saint John's was granted the rights to share the movie locally through 2022. Five community screenings ensued broadening the impact of the film and generating discussion around isolation and loneliness faced personally by seniors in Milwaukee County.

The **Welcome Table Project** engaged participants, 55 and older, in a weeklong arts experience providing tangible proof of the benefits of the arts and their promise for improving quality of life and well-being in older adults. This workshop was made possible through a partnership with **Black Arts MKE's Bronzeville Arts Ensemble** and **UW-Milwaukee Theatre Department.**

A Holiday Celebration and luncheon was hosted for the clients and volunteers of **Eastside Senior Services**. It's our honor to partner with ESS as we embrace their mission of helping older adults live independently and stay connected to their community.

Building Capacity

Charitable Care

Saint John's person-centered culture ensures our 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, regardless of where they reside 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.

	2022	2021	2020	2019
Benevolent Support	\$322,000	\$324,000	\$345,000	\$165,000
Medicaid Shortfall	\$67,000	\$156,000	\$68,000	\$361,000
TOTAL CONTRIBUTION	\$389,000	\$480,000	\$413,000	\$526,000

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.

We are excited by the growth and success of our clinical recruitment including the hiring of two graduate nurses who are caring for our skilled nursing residents. Local students fulfilled their course objectives working with residents while being mentored by Saint John's professional staff. A total of 12 RN students from MATC completed a substantial part of their Spring and Fall clinical rotations with our nurses in the care neighborhoods and a Chamberlain University Master of Nursing student successfully completed her program in nursing education while interning with our clinical team. Seventy of Marquette University's Doctor of Physical Therapy students practiced their knowledge of geriatric balance, strength and endurance assessments with our residents at Senior Fitness Day on our campus.

Saint John's Wellness staff participated in the Milwaukee County Falls Prevention Coalition at United Community Center to promote awareness and education for preventing falls. Staff provided falls screenings, home safety education and footwear evaluations offered in both English and Spanish.



Internally, our scholarship program, funded through the Foundation's Scholarship Fund, supports 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 2022, seven employees were awarded \$13,000. Over the last 20 years, 183 scholarships have been awarded totaling \$261,205.

Following the North Tower construction and re-opening of Saint John's Salon, our nail drying station was in need of a new home. We connected with a **MATC** Nail Technician program graduate to provide her with momentum as she started a new venture.

Creating Lasting Solutions

Support of Dementia Education, Research and Those Living with Dementia

An **Opening Minds through Art (OMA)** program was implemented at Saint John's modeled after this award-winning, evidence-based, intergenerational art-making program for people with Alzheimer's disease and other forms of neurocognitive disorders. The program provides creative self-expression and social engagement, while creating an opportunity for volunteers to improve their attitude toward aging through weekly interaction with program participants.

Saint John's has a long-standing relationship with the **Alzheimer's Association** and is a site for the monthly gathering of their local support group, offering a place to talk about care giving challenges and share a cup of coffee. In May, Saint John's was a sponsor of the Teaming Up to EndAlz Gala and in September, the **Saint John's Sparklers** team comprised of 24 residents, staff, family and friends showed their support by walking and raising over \$3,000 to increase awareness and needed funds for research and education.

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

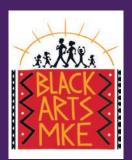
The Board of Saint John's Communities Foundation stewards the Fund for the Visually Impaired which promotes granting opportunities to local agencies with missions to serve older adults with vision challenges. In 2022, three organizations were awarded a total of \$10,000 to continue serving clients in the Milwaukee community:

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

Paying it Forward

Saint John's is a proud promoter of **United Way's Annual Campaign**. Residents and employees contributed \$154,482 to support the services needed to keep Milwaukee clients healthy, financially stable and safe. Ambassadors Gerry and Elaine Mainman helped champion the resident effort. We couldn't have done it without them and all the many givers.

Saint John's Chapel organizes Lenten and Advent outreach campaigns. In 2022, these two initiatives raised a combined \$8,000 to benefit **The Gathering** and **Habitat for Humanity** raising critical funds for two worthy causes.



















Making a Difference

In recognition of Dr. Martin Luther King, Jr.'s birthday, a winter outerwear drive was held collecting coats, hats, mittens and gloves to benefit the **COA Youth & Family Centers.**

Residents of our Health Center assembled thirty cold weather kits consisting of winter gloves, wool socks, bottled water and personal care items to benefit the guests of **St. Ben's Community Meal Program**.

A volunteer team of residents and employees joined forces to tackle an Earth Day clean-up around the Saint John's eastside neighborhood. This event was in connection with BIG CLEAN MKE, a year-round effort of **Keep Greater Milwaukee Beautiful** to maintain cleaner, healthier neighborhoods and reduce litter.

Saint John's educational partnership with **Our Next Generation** is back in action following a break during the COVID-19 pandemic. Students from ONG visit Saint John's on Monday's where residents share their knowledge and unique talents through a robust enrichment program schedule. On Tuesdays, Saint John's volunteers travel to ONG's Homework Club to provide one-on-one tutoring for grades 1-5.

Twice weekly throughout the year, residents Jim Ballard, Steve Byer and Barbara Larkin dropped off carloads of boxes and bags full of toiletry items and gently-used clothing at the **Milwaukee Rescue Mission**—a shelter and resource center for Milwaukee's homeless.

Kinship Community Food Center was the beneficiary of nonperishable food which is collected year-round in a bin located in Saint John's Bistro. Residents Holger Petersen and Kent Mayfield made innumerable deliveries to Kinship to support the greater needs of the community.

The Great Hunger Book Sale is the beneficiary of literally thousands of books donated annually by Saint John's Library and residents, particularly those culling their collections upon moving to Saint John's. Resident Dean Thome graciously transports the donations to **All Saints' Cathedral**. The book sale is the largest in the greater Milwaukee area with proceeds benefitting local charities serving the needs of the hungry and the homeless.

The International Institute of Wisconsin assists refugees who seek to establish new beginnings in the Milwaukee area. Resident Susan Ploetz facilitates the repurposing of the household necessities to support their mission.

Saint John's has an ongoing relationship with **Habitat for Humanity** to find a "green" alternative for used cabinets, countertops, appliances, furniture and home décor. These items are repurposed for homes under construction in the inner city for low-income families.

Knit Wits and Stitch Wits donated beautiful scarves and mittens made with love. The handcrafted items benefitted many nonprofit organizations including COA Youth & Family Centers, Eastside Senior Services, All People's Church, Meta House, Gesu Mitten Tree, Benedict Center, among others.



We've Got Your Number!

116,289

15,792 views of our website's Careers Page. Check it out for yourself by scanning this QR Code...



500,000 steps by Maintenance Team member Thomas Francis while fullfilling his full-time, 2nd shift responsibilities.



1,958

Events, programs, lectures, parties, happy hours and performances in 2022.



5 farmer's markets held in the MOWA Gallery with the produce obtained from our partnership with Clare Gardens.

non-profit organizations were the recipients of countless pairs of mittens, hats, scarves and shawls created by the SJOL Knit-Wits and Stitch Wits, including:

5 festive knitted hats for chickens!

4,700 Books...
1,142 CDs...
1,290 DVDs and
840 Volunteer hours in our Library.



30,000 gallons of water to fill the SJOL pool.



520 individuals call Saint John's On The Lake "home." Of those, 74 are couples, 343 are women and 177 are men.



Shore Holder's Club Members on our wait list.

6,336 eggs: fried, scrambled, poached and used in the production kitchen.



gallons of ice cream was eaten by residents, visitors and staff.



Finance

BALANCE SHEETS / DECEMBER 31, 2022 & 2021

	<u>2022</u>	<u>2021</u>
ASSETS		
TOTAL CURRENT ASSETS	2,818,604	5,549,108
INVESTMENTS	64,361,502	68,103,542
PROPERTY, PLANT & EQUIPMENT, NET	175,718,928	182,534,389
DEFERRED FINANCING AND MARKETING FEES	2,137,459	2,147,655
INTEREST IN SAINT JOHN'S COMMUNITIES FOUNDATION	8,597,480	10,003,964
INTEREST IN SUBSIDIARY	74,998	74,998
TOTAL ASSETS	253,708,971	268,413,656
LIABILITIES AND NET ASSETS		
TOTAL CURRENT LIABILITIES	9,000,862	8,164,982
DEFERRED REVENUE	122,826,224	118,428,745
LONG-TERM DEBT	126,855,630	132,062,166
TOTAL LIABILITIES	258,682,716	258,655,893
NET ASSETS	(4,973,745)	9,757,763
TOTAL LIABILITIES AND NET ASSETS	253,708,971	268,413,656

STATEMENTS OF OPERATIONS / YEARS ENDED DECEMBER 31, 2022 & 2021

REVENUE, GAINS AND OTHER SUPPORT	<u>2022</u>	<u>2021</u>
TOTAL RESIDENT REVENUE INVESTMENT INCOME UNRESTRICTED CONTRIBUTIONS OTHER TOTAL REVENUE, GAINS AND OTHER SUPPORT	26,029,422 1,931,856 198,250 2,317,476 30,477,004	24,690,778 3,085,199 327,398 2,621,648 30,725,023
OPERATING EXPENSES		
DIRECT CARE, SUPPORT SERVICES & ADMINISTRATION INTEREST TOTAL OPERATING EXPENSES	22,284,953 4,714,042 26,998,995	19,701,116 5,470,037 25,171,153
GAIN (LOSS) FROM OPERATIONS	3,478,009	5,553,870
CHANGE IN UNREALIZED GAINS & LOSSES DEPRECIATION AND AMORTIZATION GAIN (LOSS) ON REFINANCING GAIN ON DISPOSAL OF FIXED ASSETS INCREASE (DECREASE) IN UNRESTRICTED NET ASSETS	(8,870,321) (8,921,637) 428,404 34,400 (13,851,145)	5,310,975 (8,466,956) (7,437,085) 0 (5,039,196)
CHANGE IN RESTRICTED ACTIVITY	(880,367)	1,658,895
CHANGE IN NET ASSETS =	(14,731,512)	(3,380,301)

An audited financial report is available upon request.

Saint John's Communities, Inc. Board



Polly Walker Beal Chair



Judith T. Moor Vice Chair



Kathleen Armbruste Secretary



Matthew S. Coburr Treasurer



Betty Arn



M. Lee Coppernoll



The Rev. Andy Jones



Alice M. Kuramoto Resident



The Rt. Rev. Jeffrey Lee Bishop Provisional



M. Kent Mayfield Resident



Diane Milner

Corporate Officers

Renée E. Anderson, President & CEO Dan A. Lemminger, Vice President & CFO

Saint John's Leadership Team

Matt Loyd, Chief Operating Officer
Erin Burke, Director of LifeStreams
Cathy Carr, Director of Philanthropy
Keshia Exum-Pryor, Chief People Officer
Melissa Geszvain, Director of Dining
Luci Klebar, Director of Sales & Marketing
Brian McPherson, Director of Maintenance
Jennifer Milkiewicz, Director of Resident Services
Bill Monks, Director of Housekeeping
Dorie Petitt, Director of Health Services
Jana Troutman-Miller, Director of Spiritual Care

Saint John's Communities Foundation, Inc. Board

Renée E. Anderson, President Anthony (Tony) W. Asmuth III, Resident Sara E. (Patsy) Aster, Resident Robinson (Boz) W. Bosworth III, Resident Susan (Suzy) W. Brennan Judith (Judy) T. Moon, Corporate Board Designee

Ethics Committee

Jana Troutman-Miller, Chair Renée Anderson Patsy Aster Latoya Baxter Meighan Bentz Amy Biller Daniels Mary Kunze

Nancy Leafolad Matt Loyd Dorie Petitt John Sanidas, M.D. Kristen Tym Mary Kate Uy Kathie Vint

Tower Resident Council

Barbara Byer, Chair Jane Ziol, Vice Chair Tom Basting, Secretary Susan Masland, Nominating Committee Chair

Resident Representatives

Cheri Briscoe* Molly Canary Susan Greenwald* Bob Kagen* Patricia Lidicker Richard Lindberg Irene Lipo Juanita Mast Kent Mayfield Lucia Petrie Carol Pohl Bernice Popelka Marge Ryan Sandy Shaw Nancy Snyder* Connie Tresch Melissa Walker Marian Yoder

* Resident Council Member

Dimension Coordinators

Emotional: Barbara Byer
Environmental: Denise McCarthy
Intellectual: Kent Mayfield
Occupational: Angie Kopf
Physical: Joanne Barndt
Social: Juanita Mast
Spiritual: Jeanne Durnford

Resident Committee Chairs

Archives: Susan Ploetz Chapel Council: Bill Lau Dining: Susan Mazza

Diversity, Equity and Inclusion:

Kent Mayfield

Emotional Wellness: Barbara Byer

Facilities: Tom Briscoe

Garden & Landscape: Susan Mazza

Green: Bernice Popelka Health: Joanne Barndt Library: Rita Rochte

Newcomers: Susan Masland Program: Carol Pohl & Frank Wilson Racial Justice: Suzanne Osetek Spiritual Growth: Jeanne Durnford Technology: Michael Barndt

Volunteer: Angie Kopf



Listings on this page are current as of May 2023



