

2022 Foundation Annual Report



Enrich the Present, Enhance the Future



President's Report by Renée Anderson



Saint John's Communities Foundation exists to support the community fondly known as Saint John's On The Lake. Income from the numerous endowed funds stewarded by the Foundation is used to continue, enhance and ensure in perpetuity programs and services vital to those who live and work here. It sounds simple enough, yet we are often asked why give to Saint John's?

Three reasons come immediately to mind:

1. Foundation support offsets operational expenses, thereby helping to manage future fee increases – donors are investing in the future of all those who live or may come to live at Saint John's.
2. Foundation support guarantees essential programs and services are sustained. As an example, our Episcopal faith traditions continue to be celebrated as a result of the Chaplaincy and Chapel Music Funds.
3. Foundation support allows us to contribute to the wellbeing of employees and the broader community. Donor generosity provides employee scholars and local agencies serving older adults with financial assistance.

Each year we are overwhelmed by the generosity of our donors, and 2022, despite tumultuous economic conditions, was no exception. Cathy Carr, promoted to Director of Philanthropy in April of last year following the retirement of long-term employee Sybil Bell, quickly embraced the role finding joy in meeting with new residents and introducing them to our culture of Philanthropy. Not only did charitable giving achieve a new high, legacy giving, particularly by residents newer to Saint John's, increased.

We are grateful to all Foundation stakeholders - donors, residents, the Board of Directors and the Office of Philanthropy – for their contributions of time, talent and treasure. Each gift is received with a joyful heart.

With appreciation,

A handwritten signature in black ink that reads "Renée Anderson". The signature is fluid and cursive, with the first name and last name clearly distinguishable.

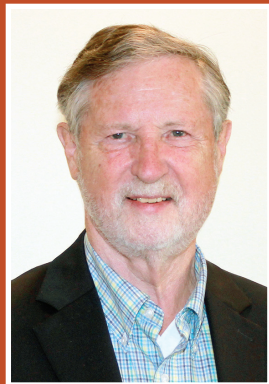
Renée E. Anderson
President

SAINT JOHN'S FOUNDATION PURPOSE STATEMENT

The Foundation is a charitable organization, the purpose of which is to solicit, hold, manage, invest and expend endowed funds for the benefit of the community of Saint John's and to support its programs and activities.

Saint John's Foundation Board & Staff

The Board of Directors is responsible for active participation in the governance of, and direct personal involvement in, the Foundation's purpose of fund development, investment management, financial stewardship and organizational administration to benefit both the Foundation and the Foundation's primary beneficiary, Saint John's Communities, Inc.



Saint John's Communities Foundation, Inc. Board of Directors:
Renée Anderson, President; Tony Asmuth, Patsy Aster,
Boz Bosworth, Suzy Brennan, Judy Moon.



Cathy Carr
Director of Philanthropy
Foundation Secretary



Dan Lemminger
Chief Financial Officer
Foundation Treasurer



Amy Sugent
Donor Relations Specialist
Foundation Recorder



On the Cover:

As longtime supporters of Milwaukee's nonprofit community, **Gerry and Elaine Mainman** are the perfect fit in serving as our Resident Ambassadors for The United Way Campaign. The Mainmans have a long history with Saint John's dating back to when Saint John's was located on Cass Street. Both volunteered at Saint John's. Elaine served as a volunteer in the Occupational Therapy department. She enrolled in a looming

class to engage with the residents and teach them how to weave. Gerry served on the Communities' Board of Directors and was instrumental in building the original Prospect Avenue campus.

Thank you, Gerry and Elaine for your years of commitment and friendship, and for continuing on this journey together to make a difference in the lives of others.



Saint John's is affiliated with the Episcopal Diocese of Milwaukee, whose volunteer churchwomen founded Saint John's in 1868.

Treasurer's Report by Dan Lemminger

The Saint John's Communities Foundation, Inc. ("the Foundation") collection of funds exists to provide support to Saint John's Communities, Inc. ("Communities") operations for their respective stated purpose and to provide grants to agencies supporting the visually impaired in the greater Milwaukee community. One new fund debuted in 2022: the Community Impact Fund. No funds sunset in 2022. Consequently, the Foundation currently consists of eighteen funds, all of which actively accept cash contributions. In 2022, seventeen funds received contributions totaling approximately \$532,000 – an average of \$31,294 per fund – with over \$189,000 gifted to the General Fund, another \$96,000 directed to the Community Impact Fund, and \$71,000 collectively to the respective Scholarship/Fellowship Funds. Additionally, in 2022 the Foundation completed its fourth distribution in support of community impact initiatives (formerly the Institute On Aging) cumulative distributions exceeding \$400,000 through December 31, 2022.

Currently, 94% of the funds' capital, valued at approximately \$8.6 million as of year-end, is held in trust by U.S. Bank with portfolio investment management provided by Marquette & Associates. Administrative support, including clerical, fundraising, accounting and management is provided to the Foundation by Communities staff. All such expense is currently borne by Communities.

The annual distribution from the Marquette-invested funds is 5% of the 20-quarter rolling average portfolio market value plus discretionary, Board-designated distributions for earnings in excess of the 5%. Specific fund distribution restrictions take precedence over this general distribution rule. September 30 of each calendar year is the established measurement date in order to have a uniform procedure that facilitates Communities' budget preparation.

The Foundation's fiscal year is based on a calendar year-end. In addition to the \$532,000 donation revenue recorded in 2022, the Foundation also realized \$921,000 in Investment Income. Investment and treasury management fees totaled \$19,600, or .22% of the fund's net assets. Distributions to Communities for the aforementioned support totaled \$347,000. Grant payments totaling \$10,000 were made to three Milwaukee area agencies supporting those who are visually impaired. "Other" miscellaneous activity resulted in a decrease in net assets of \$2,500,000 primarily attributed to unrealized losses on the investment portfolio, reflective of the overall unfavorable 2022 investment markets.

The Foundation is considered a "subsidiary" of Communities due to the fact the Communities' Board of Directors approves all members of the Foundation's Board. As such, the Foundation's financial statements are required to be audited and consolidated with those of Communities.

Furthermore, Wisconsin Statute § 202.11 requires a charitable organization with annual contributions over \$500,000 to file an audited financial statement prepared by an independent CPA. As a result of the \$532,000 in 2022 contributions an Independent Auditor's Report is required to be filed with the state.



Investment Report

Return Objectives

The primary return objective of the Fund is to exceed inflation by a minimum of 5% per year while assuming reasonable investment risk.

Risk Tolerance

While achieving the return objectives, the Fund is able to tolerate certain levels of risk, which are:

- A. To accept prudent levels of short and long-term volatility consistent with the near-term cash flow needs, funding level and long-term liability structure of the Fund,
- B. To tolerate appropriate levels of downside risk relative to the Fund's target rate of return. In doing so, the Investment Committee will attempt to minimize the probability of underperforming the Fund's target rate of return over the long-term and to minimize the shortfall in the event such underperformance occurs,
- C. To accept certain variances in the asset allocation structure of the Fund relative to the broad financial markets and peer groups, and
- D. To tolerate certain levels of short-term underperformance by the Fund's investment managers.

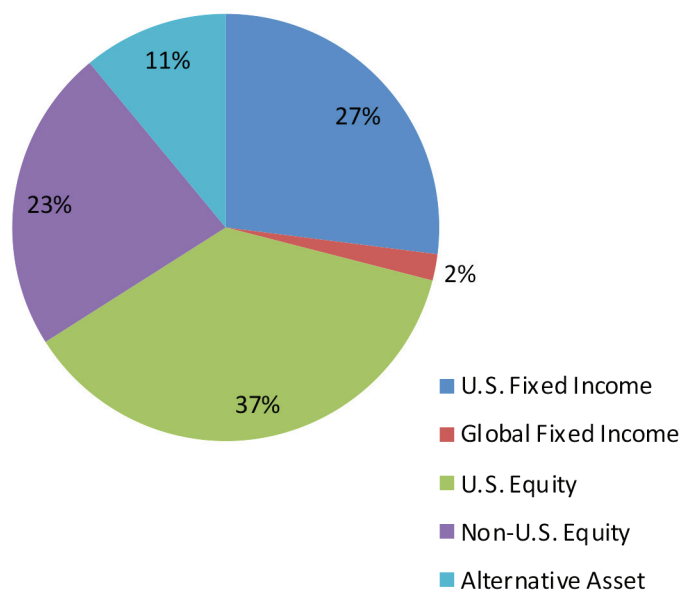
Constraints on the Investment Objectives

Included in the cash/fixed income portion of the portfolio are the money market and high quality fixed income assets having a redemption value approximately equal to the estimated cash needs of the Fund during the trailing 3 to 4 years. The estimated cash needs of the Fund per year is the annual distribution amount of 5% of the value of the Fund utilizing the "Harvard Method" (approximately \$150,000) plus other known or potential needs of Saint John's, if any.

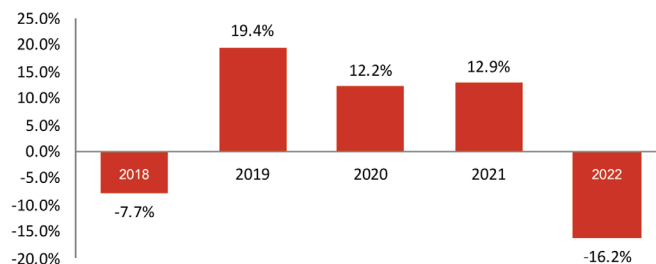
The total market value of endowment assets held by Marquette Associates as of December 31, 2022 was \$8 million.

The portfolio was allocated by Marquette as shown in the accompanying graph. The distribution is consistent with the Specific Investment Allocation targets as dictated by the Saint John's Communities Foundation, Inc. Investment Policy Statement.

TOTAL COMPOSITE OF ASSETS HELD BY MARQUETTE



Annualized Returns 2018-2022



Portfolio returns on investment over the last five years ranged from a negative 16.2% to a positive 19.4%, with an average for the five-year period of 4.12%. The individual annual returns reflect the stock market volatility experienced nation-wide during the last five years.

**SAINT JOHN'S COMMUNITIES FOUNDATION, INC.
BALANCE SHEETS AT DECEMBER 31, 2022 & 2021**

	<u>2022</u>	<u>2021</u>
<u>ASSETS</u>		
Cash	\$ 384,770	\$ 135,622
Investments	\$ 8,045,709	\$ 9,828,069
Pledges Receivable	\$ 50,000	\$ 53,770
Due from Saint John's Communities, Inc.	\$ 180,504	\$ -
TOTAL ASSETS	<u>\$ 8,660,983</u>	<u>\$ 10,017,461</u>
<u>LIABILITIES</u>		
Accrued Audit Fees	\$ (2,750)	\$ (2,500)
Due to Saint John's Communities, Inc.	\$ (60,753)	\$ (10,997)
Total Liabilities	<u>\$ (63,503)</u>	<u>\$ (13,497)</u>
NET ASSETS	<u>\$ 8,597,480</u>	<u>\$ 10,003,964</u>
<u>BALANCE BY FUND</u>		
<u>Unrestricted</u>	\$ 4,070,144	\$ 4,837,426
General Fund		
<u>Restricted</u>		
The Albert O. Nicholas Chapel Music Fund	\$ 258,997	\$ 318,354
The Albert O. Nicholas Chaplaincy Fund	\$ 2,223,828	\$ 2,738,117
Directors Fund for Charitable Care	\$ 416,003	\$ 443,963
Garden & Nature Fund	\$ 105,029	\$ 123,209
Community Impact Fund	\$ 88,432	\$ -
LifeStreams Funds:		
LifeStreams Program Fund	\$ 233,352	\$ 197,687
Verena Fjermestad & Bruce Fetter Music Fund	\$ 59,205	\$ 70,271
Bill & Char Johnson Music Fund	\$ 68,778	\$ 78,925
Bela & Julie Maroti Opera Fund	\$ 50,000	\$ 27,184
Alice & Jim Nelson Choral Music Fund	\$ 67,677	\$ 80,825
Bill & Nicole Teweles Entertainment Fund	\$ 25,658	\$ 36,401
Jean B. Tyler Program Fund	\$ 71,180	\$ 81,992
Phyllis Wagoner Chamber Music Series Fund	\$ 21,141	\$ 26,159
Scholarship Fund	\$ 482,856	\$ 516,855
Lloyd Lewis Fellowship Fund	\$ 38,933	\$ 44,937
Angela Titus Scholarship Fund for Dementia Education	\$ 64,434	\$ 72,400
Fund For The Visually Impaired	\$ 251,833	\$ 309,259
Total Restricted	<u>\$ 4,527,336</u>	<u>\$ 5,166,538</u>
TOTAL FUNDS	<u>\$ 8,597,480</u>	<u>\$ 10,003,964</u>

**STATEMENTS OF OPERATIONS FOR THE PERIODS ENDED
DECEMBER 31, 2022 & 2021**

INCOME	2022	2021
<u>Foundation Unrestricted Gifts</u>		
General Fund	\$ 189,547	\$ 133,337
<u>Foundation Restricted Gifts</u>		
The Albert O. Nicholas Chapel Music Fund	\$ 650	\$ 3,200
The Albert O. Nicholas Chaplaincy Fund	\$ 1,100	\$ 35,295
Directors Fund for Charitable Care	\$ 57,459	\$ 101,269
Garden & Nature Fund	\$ 5,090	\$ 46,574
Community Impact Fund	\$ 96,336	\$ -
<u>LifeStreams Funds:</u>		
LifeStreams Program Fund	\$ 77,725	\$ 44,239
Bill & Char Johnson Music Fund	\$ 2,500	\$ -
Bela & Julie Maroti Opera Fund	\$ 27,558	\$ 850
Jean B. Tyler Program Fund	\$ 2,435	\$ 2,710
Phyllis Wagoner Chamber Music Series Fund	\$ 325	\$ 2,800
Scholarship Fund	\$ 64,368	\$ 74,843
Lloyd Lewis Fellowship Fund	\$ 3,500	\$ 12,000
Angela Titus Scholarship Fund for Dementia Education	\$ 3,100	\$ 3,100
<u>Total Restricted Gifts</u>	<u>\$ 342,146</u>	<u>\$ 326,880</u>
<u>Total Gifts</u>	<u>\$ 531,693</u>	<u>\$ 460,217</u>
<u>Investment Income</u>		
Dividends/Interest	\$ 224,528	\$ 255,767
Realized Gain (Loss) on Sale of Investments	\$ 696,469	\$ 472,042
<u>Total Investment Income</u>	<u>\$ 920,997</u>	<u>\$ 727,809</u>
TOTAL INCOME	\$ 1,452,690	\$ 1,188,026
EXPENSES		
<u>Investment & Treasury Management Fees</u>		
Marquette Associates	\$ 15,000	\$ 11,250
BMO Harris	\$ 437	\$ 921
U.S. Bank	\$ 3,669	\$ 4,042
Credit Card Processing Fees	\$ 272	\$ 215
Robert W. Baird	\$ 218	\$ 323
<u>Total Investment Management Fees</u>	<u>\$ 19,596</u>	<u>\$ 16,751</u>
<u>Distributions</u>		
Saint John's Communities, Inc.	\$ 196,520	\$ 326,323
Saint John's Communities, Inc. - Chapel Music	\$ 11,000	\$ 11,000
Saint John's Communities, Inc. - Chaplaincy	\$ 93,300	\$ 94,300
Saint John's Communities, Inc. - Charitable Care	\$ 12,700	\$ 10,700
Saint John's Communities, Inc. - Fjermestad/Fetter Music	\$ -	\$ 2,300
Saint John's Communities, Inc. - Garden & Nature Fund	\$ 4,300	\$ 2,700
Saint John's Communities, Inc. - Johnson Music	\$ -	\$ 2,700
Saint John's Communities, Inc. - Library	\$ 1,500	\$ 1,500
Saint John's Communities, Inc. - LifeStreams Program Fund	\$ 5,700	\$ 5,000
Saint John's Communities, Inc. - Nelson Choral Music	\$ 500	\$ 600
Saint John's Communities, Inc. - Jean B. Tyler Program Fund	\$ 600	\$ 2,700
Saint John's Communities, Inc. - Teweles Entertainment	\$ 6,000	\$ 3,000
Saint John's Communities, Inc. - Wagoner Chamber Music	\$ 600	\$ 3,600
Saint John's Communities, Inc. - Lloyd Lewis Fellowship Fund	\$ 1,600	\$ -
Saint John's Communities, Inc. - Scholarship Fund	\$ 13,000	\$ -
<u>Total Distributions</u>	<u>\$ 347,320</u>	<u>\$ 466,423</u>
<u>Grants</u>		
Visual Impairment Service Organizations	\$ 10,000	\$ 10,000
<u>Total Grants</u>	<u>\$ 10,000</u>	<u>\$ 10,000</u>
TOTAL EXPENSES	\$ 376,916	\$ 493,174
OTHER		
Unrealized Gain (Loss) on Investments	\$ (2,479,356)	\$ 425,283
Charitable Organization Renewal Fee	\$ (64)	\$ (64)
Wipfli Audit Fees	\$ (2,750)	\$ (2,500)
Miscellaneous	\$ (86)	\$ (41)
TOTAL OTHER	\$ (2,482,256)	\$ 422,678
INCREASE (DECREASE) IN NET ASSETS	\$ (1,406,482)	\$ 1,117,530

Philanthropy Report by Cathy Carr

GENEROSITY. GROWTH. GRATITUDE.

Saint John's was honored with over 22 years of dedicated service by Sybil Bell, who retired as the Chief Philanthropy Officer in April. Her commitment, positive energy and vision leave a lasting legacy on Saint John's culture of Philanthropy, for which we are most grateful. We wish Sybil many years of retirement full of joy!

It is deeply gratifying to report that the year ended significantly over-goal, underscoring again that Saint John's is a most generous community of philanthropic donors.

Visionary volunteers incorporated Saint John's Foundation in 1982 to create a framework of charitable giving opportunities. From that historic commitment, the Foundation's Board of Directors continues the purposeful work to grow the endowment, steward the funds and advance Saint John's position as a leader in aging services. Over the course of 40 years, the assets have grown from that initial opening balance of \$100,000 to \$8.6 million.

2022 YEAR-IN-REVIEW

Through the many generous financial gifts to the Foundation, our donors play an essential role advancing and investing in future programs and initiatives. It is the privilege of the Office of Philanthropy to connect donors with options to fulfill personal philanthropic goals while finding alignment with Saint John's organizational needs.

Charitable giving has increased annually as the culture of philanthropy message continues to be fostered.

The Foundation opened one new fund in 2022:

THE COMMUNITY IMPACT FUND was opened in January as a legacy gesture to honor the accomplishments of Donna Spars, retired Vice President, and Kent Mayfield, our visionary volunteer. The fund's purpose is to build capacity of organizations in the wider Milwaukee community to support the creation of lasting solutions to the negative consequences of poverty, discrimination and chronic health conditions among older adults. As a focus of this year's Annual Campaign, the Community Impact Fund's year-end balance reached \$88,432.

THANK YOU for your generosity in 2022 to enrich the present and enhance the future of Saint John's Communities.

Saint John's Office of Philanthropy promotes giving to two entities:

- the Foundation's endowed funds and
- Communities' operational needs.

We are beyond excited to report that gifts to the Employee Holiday Fund totaled \$307,501 making a powerful statement from residents, families and board members in appreciation for "service excellence" provided by staff throughout the year.

At year-end, the Foundation's portfolio asset balance of \$8.6 million represented a 24% increase over the last five years. It was and is a big achievement. Our gratitude abounds for the Foundation's founding donors who likewise can take deep satisfaction in knowing their early investments have made a difference in our community today and in all our tomorrows. And, this indeed gives testimony to our community's engagement in a culture of philanthropy.

CONTRIBUTION HISTORY

	2022	2021	2020	2019	2018
Annual Giving to Communities	\$377,003	\$430,692	\$402,174	\$424,474	\$445,977
Annual Giving to Foundation	\$531,693	\$460,217	\$203,174	\$269,242	\$306,797
TOTAL COMBINED	\$908,696	\$890,909	\$605,347	\$693,716	\$752,774
FOUNDATION TOTAL ASSETS	\$8,660,983	\$10,017,461	\$8,995,336	\$8,249,732	\$6,976,339

ACTIVITIES IN THE OFFICE OF PHILANTHROPY

- Following a one year pause during the pandemic, Saint John's welcomed more than 250 attendees to 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 **Education Awards Program** recognized the Foundation Funds focused on employee education including the Scholarship Fund, Lloyd Lewis Fellowship Fund and the Angela Titus Scholarship Fund for Dementia Education. The program included the presentation of the **38th Annual Scholarship Awards** celebrating seven applicants who were granted a total of \$13,000 in tuition assistance to earn future degrees and certifications. We applaud each student's efforts to balance work, family, home and studies. Over the last 20 academic years, 183 scholarships have been awarded totaling \$261,205 – WOW! In its first year of eligible distributions, the Lloyd Lewis Fellowship Fund provided support for eight of Saint John's clinical team to achieve Wound Care Certification allowing for a higher level of wound care management and prevention strategies.
- We partnered with **United Way** to promote their annual campaign to employees and residents. Contributions totaled more than \$154,482 from residents and employees. Our Volunteer Resident Ambassadors **Gerry and Elaine Mainman** led a successful campaign representing an impressive 21% increase!
- The Saint John's Sparklers Team, comprised of 24 employees, residents and family members, showed their support by walking and raising over \$3,000 to support the **Alzheimer's Association's Walk to End Alzheimer's**.
- In November, the annual **Legacy Society Recognition** paid homage to our members who believe in the extraordinary. The Foundation celebrated donors whose lifetime giving exceeds \$10,000 as well as donors who have arranged for legacy gifts in their estate plans. The impact from a planned gift sustains Saint John's position as a leader in premiere retirement living. Each donor was presented with a box of Burke's Candy, a local chocolatier.

GRANT AWARDS

The Foundation Board reviewed grant applications for its annual award distributions from the **Fund for the Visually Impaired**. The applicants represented local organizations whose mission provides supportive services to older adults with vision challenges.

The Board approved three grants totaling \$10,000 which were distributed in the first quarter 2022, to these worthy recipients:

- **ABLE: Audio & Braille Literacy Enhancement** provides alternative ways for people with print-disabilities to read.



- **Center for Deaf-Blind Persons, Inc.** 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 \$151,456 has been awarded to support operations of qualifying service agencies.

- Throughout the year, stories gratefully acknowledged our generous community in three editions of the Enriching Lives newsletter further highlighting all the joyful giving.



Saint John's resale shop and on-line Etsy site continue to offer a "green" alternative to finding new homes for home furnishings benefiting employees, residents and the community. Annual proceeds reached a record \$41,350 – A win-win-win! Thank you to the 20 resident volunteers who dedicate their time, talent and knowledge to the shop's success.

Endowed Foundation Funds

ALBERT O. NICHOLAS CHAPEL MUSIC FUND **ALBERT O. NICHOLAS CHAPLAINCY FUND**

Seeded as Acorn Funds in 2001 by Jon and Terrie Barsanti and opened as an endowed fund in 2015 by Renée Anderson and the Trustees of Funds and Endowments, Inc.

To assure that there shall be appropriate music at Episcopal services held in the Chapel of Saint John the Evangelist and to ensure that there shall at all times be a full-time Episcopal Chaplain on staff on the campus at Saint John's On The Lake.

***COMMUNITY IMPACT FUND**

Seeded in 2022 by Donna Spars and M. Kent Mayfield to continue in perpetuity their commitment to community outreach
To build capacity of organizations in the wider Milwaukee community through supporting the creation of lasting solutions to the negative consequences of poverty, discrimination and chronic health conditions among older adults.

DIRECTORS FUND FOR CHARITABLE CARE

Opened in 2013 by Renée Anderson, Dick Bibler, Susan Wright Brennan, Bill Goldammer, Lloyd Lewis and Dick Miller

To assist Communities in enabling residents of Saint John's On The Lake to maintain their residence although their personal resources can no longer fully cover their residency costs.

GARDEN & NATURE FUND

Opened in 2014 by Mary Beth & Holger Petersen
To supplement Communities' budget for the maintenance and enhancement of the gardens, landscaping, outdoor lighting and such natural amenities of the Communities' campus as the bee project and the butterfly garden.

GENERAL FUND (UNRESTRICTED)

Opened in 1982
To support the general budget of Communities through annual distributions.

FUND FOR THE VISUALLY IMPAIRED

Opened in 2005 by the Sunrise Foundation
To provide annual grant awards to organizations in Southeastern Wisconsin that provide services to or for older adults with visual impairment.

*New 2022 Endowed Fund

EDUCATIONAL FUNDS

LLOYD LEWIS FELLOWSHIP FUND

Opened in 2019 by Lloyd Lewis
To provide licensed health care staff with additional financial resources to attain certification or the completion of approved training in the best practices in health care services to our residents.

ANGELA TITUS SCHOLARSHIP FUND FOR DEMENTIA EDUCATION

Opened in 2019 by Renée Anderson
To honor the memory of Angela Titus, Dementia Specialist and LifeStreams Manager, to provide scholarships to employees to attain knowledge of the best practices in dementia care service.

SCHOLARSHIP FUND

Opened in 2014 by Lloyd Lewis
To provide employee scholarship awards for those who seek to advance their learning, complete certifications or expand professional skills at accredited educational institutions.



2022 Scholarship Award Recipients (Pictured left to right):

Jacques Hayes
Early Childhood Development
UW-Whitewater

Megan Blas
Social Work, UW-Milwaukee

John Olsen
Social Work, UW-Milwaukee

Jordan Johnson
Nursing
Bryant & Stratton College

Thien-Y Tran
Nursing, MATC

Casey Duzeski
Nursing
Bryant & Stratton College

Tiara Turner
Nursing, MATC

The 38th Annual Scholarship Awards

Seven exceptional employees were recognized for their academic efforts awarding educational scholarships with a combined total of \$13,000. We applaud the many dreams and ambitions of our student employees and wish them every success on their academic journey.

Endowed Foundation Funds

LIFESTREAM PROGRAM FUNDS



LIFESTREAMS PROGRAM FUND

Opened in 2014 by Miriam Reading & Richard Miller
To provide flexibility and variety in programming of Seven Dimensions emphasizing the emotional, environmental, intellectual, occupational, physical, social and spiritual aspects of living well.

VERENA FJERMESTAD & BRUCE FETTER MUSIC FUND

Opened in 2016 by Bruce Fetter

To honor the memory of Verena Fjermestad and to provide classical music concerts by faculty and students of the UW-Milwaukee Peck School of the Arts.

BILL & CHAR JOHNSON MUSIC FUND

Opened in 2016 by Bill & Char Johnson

To honor the memory of Albert O. Nicholas, friend of the Johnsons and benefactor of Saint John's, this fund supports semi-classical concerts by professional musicians.

BELA & JULIE MAROTI OPERA FUND

Opened in 2015 by Bela & Julie Maroti

To fund annual performances by the Florentine Opera Company on the campus of Saint John's.

ALICE & JIM NELSON CHORAL MUSIC FUND

Opened in 2016 by Alice Nelson

To honor the memory of Jim Nelson and to sponsor choral music performances on the campus of Saint John's by professional vocal groups.

BILL & NICOLE TEWELES ENTERTAINMENT FUND

Opened in 2016 by Nicole Teweles

To honor the memory of Bill Teweles and to sponsor programs featuring live theater, film screenings and visual arts-related exhibits.

JEAN B. TYLER PROGRAM FUND

Opened in 2013 by Miriam Reading & Richard Miller

To honor the memory of Jean B. Tyler, Tower Resident Council Chair, to provide programs of an educational nature focused primarily on the discussion of policy issues of a local, regional, statewide, national or international nature.

PHYLLIS WAGONER CHAMBER MUSIC SERIES FUND

Opened in 2011 and endowed in 2015 by Andrea Wagoner and Gregory Wagoner

To honor the memory of Phyllis Wagoner by her children for the purpose of presenting chamber music performances by Milwaukee Symphony musicians on the campus of Saint John's.



Donor Gifting Levels

January 1 – December 31, 2022

Saint John's Communities Foundation is deeply grateful for every gift, no matter the amount, as each is important to our mission. The contributions listed here reflect combined giving to both Communities and Foundation Funds. We humbly thank all of our donors; you are counted among our abundant blessings.

GIVING LEVEL OF GREATER THAN \$25,000

Estate of Eileen Finnerty
Estate of
John & Beverly Gorsuch
Phoebe Lewis
Estate of Bela Maroti
Estate of
Marcia Slater Johnston

**GIVING LEVEL OF
\$15,000 - \$24,999**
Greater Milwaukee Foundation
Borrowman Family Fund
Laskin Family Foundation, Inc.

**GIVING LEVEL OF
\$10,000 - \$14,999**
Anonymous (2)
Anne Hazelwood
Richard & Susan Lindberg
Gerry & Elaine Mainman
Jim & Betty Jo Nelsen
Alan & Carol Pohl
Allen* & Patricia Rieselbach
Donna Spars

**GIVING LEVEL OF
\$5,000 - \$9,999**
Renée Anderson & David Ham
Anonymous
John Armbruster
Tony & Kathie Asmuth
John & Jane Ausman
Richard & Kay Bibler
John & Susan Brennan
Elaine Burke
Bill & Nancy Carpenter
Emory Clark
VA Downey
Harry & Barbara Drake
Greater Milwaukee Foundation
Mary Louise B. Atkinson Fund

Barbara Larkin
Mary Lillydahl
Anne Luber
Marsh McLennan Agency
Kent Mayfield & Jack Ford
Mary McAndrews
Mike Schmitz
Richard Schreiner & Alison Graf
Hans Schroeder
VJS Construction Services
Darlene Walters

GIVING LEVEL OF \$2,000 - \$4,999

Robert Adlam
Anonymous (2)
Richard & Patsy Aster
Bruce & Betsy Axelrod
Cheryl Maurana Bales &
Howard Bales
Jim & Barbara Ballard
Charles and Jon Banks-Ray
Tom & Sally Basting
Helen Bechthold
John Becker & Mary Stott
Nat Beckwith
Susan Behrens & David Look
Betty Bostrom
Boz & Wendy Bosworth
Dick Bradley & John Stewig
Tom & Cheri Briscoe
Carol Carpenter
John & Julie Carpenter
Barbara Curran
Joe & Nancy Danas
Ellen Debbink*
Bob & Susie Drane
Penny Egan
Rebecca Elon
John & Mary Evans
Julia Evans
Sandy & Bobbie Fedderly
Pat Foster

Greater Milwaukee Foundation
Henry C., Eva M., Robert H.
& Jack J. Gillo Charitable
Fund
Judith Goetz
Alan & Iris Goldberg
Leonard & DeeDee Goldstein
Marilyn Gordon-Ross
Jim & Sarah Gramentine
Paul & Gloria Halverson
Joan Hardy
Bob & Marcia Harman
Pat Harper
Jill Heavenrich
Alan & Jean Hilgeman
Gary & Judy Jorgensen
Kathy Kain
Charles & Mary Kamps
Judy Krelitz
Alice Kuramoto
Norma Lang
Lloyd Lewis
Randy Lindert & Cecile Cheng
Elliot & Eve Lipchik
Janet Matuszak*
Joe & Susan Mazza
Dan & Connie McCarty
Jackie McCormick
Erik & Carol Moeser
Larry & Judy Moon
John & Margaret Murphy
Suzanne Osetek
Nick & Joyce Pabst
Patricia Parsons
Richard & Lois Pauls
Pete* & Lucia Petrie
Susan Ploetz
Marjorie Polack
Miriam Reading
Jane Reckmeyer
Blaine & Linda Rieke
Mark & Patricia Ruttum
Carolyn Sweers

Nici Teweles*
Frank & Kathleen Thometz
Mary Meade Ullman
Martha Vogel
Frank & Vera Wilson
The Windhover Foundation
Don & Marian Yoder
Jane Ziol

GIVING LEVEL OF \$1,000 - \$1,999

Estate of Lois Ahlhauser
Betty Arndt
Clair & Mary Baum
Bo & Polly Beal
Art & Karen Beaudry
BMO
Martha Bolles
Dan & Peg Bresnahan
Art & Anne Brooks
David & Diane Buck
Steve & Barbara Byer
Bob & Molly Canary
Sam & Vicky Carmen
Julietta & Matt Coburn
Susan Comstock
Shirley Connell
John & Sandy Dawson
Sally Dowhower &
Craig Edwards
Sandy Duffy
Elizabeth Elser Doolittle
Charitable Trusts
Jim & Judy Ford
Jim & Cindy Friauf
Max & Artyn Gardner
Inez Gilbert
Mike & Patty Grebe
Sidney Grossberg
Heritage Funeral Homes, Inc.
Margo Huston
Kathleen Kelly

Continued >>>

Every effort has been made to include all contributors. If you find an error, please accept our sincere apology. Contact Amy Sugent at 414.831.6875 or ASugent@SaintJohnsMilw.org with any corrections.

LEGEND:

* Friends we lost

Donor Gifting Levels

January 1 – December 31, 2022

GIVING LEVEL OF \$1,000 - \$1,999 (Cont.)

The Knit Wits & Stitch Wits
Ted & Barbara Koconis
Angie Kopf
David Kuehl
Bill & Missy Levit
The Levy/Saffro Charitable Fund
Irene Lipo
Steve & Karen Loreck
Ann MacIver
Doug MacNeil
Marquette Associates
Jeanne Maxon
Greg & Denise McCarthy
Joan McCracken
David & Marion Meissner
Norma Mitra
Tom Mohr
Margot Paddock
Dan & Kay Patrinos
Clare M. Peters Charitable Trust
Holger & Mary Beth Petersen
Bernice Popelka
David Raday
Bernice Rossini
Chuck & Pat Roy
Carol Ryan
Marge Ryan
Lewis Schliesman
Sally Schoendorf
Elaine Schueler
Dennis Sheahan
Nancy Simuel
Kay Smith
John & Nancy Snyder
Morton & Naomi Soifer
Scott Stalheim
Fred Stratton
Pat Tibbetts
Connie Tresch
Judy Van Till
Jim & Kathie Vint
Jane Waldbaum & Steve Morse
Richard* & Melissa Walker
Mike Walton & Mary Schueller
Allan Wheeler
Mary Ellen Winter

GIVING LEVEL OF \$500 - \$999

Louis & Suzanne Andrew
Anonymous
Mickey & Mary Ann Armour
Baird Foundation, Inc.
Michael & Joanne Barndt
Mary Lu Barron
Richard & JoAnn Beightol
Tony & Pat Busalacchi
Steve & Cathy Carr
Barbara Costanzo
D.A. Davidson & Co.
Dan* & Patty D'Angelo
Harold Dobbs
Sally Dohoney Holt
Craig & Barb Dowski
Mary Terese Duffy
Florence Dukes
Richard & Anne Egan
Sue Elsesser
Laura Ferns
Inge Ferosie
Donald Gavinski
Colette Goldammer
Marilyn Hamilton
John & Sara Hein
Betty Hills
Reg & Lenore* Horsman
Bob & Loni Kagen
Steve & Luci Klebar
Jerry & Mary Kringel
Mary Lacy
Matt & Alli Loyd
Florence Mahoney
Ardith Maney
Nancy Mayne
Bill & Paulie McCown
Cheri McGrath
Mike & Rosanne Mehta
Judith Miller
Richard Miswald
Judy Moburg
Alice Nelson
Jean Parteka
Phillips Total Care Pharmacy
Martha Prince
Greater Milwaukee Foundation
Jean & Robert Prosser Family Fund
Wes Schaum
Bobbie Schmitt
Dan Shannon & Deb Hagman-Shannon
Don* & Sandy Shaw
George & Linda Solveson
Mary Spyers-Duran
Stalheim Family Fund
Elaine Stalheim*
Dean & Kathy Thome

Julia Uihlein
Carol Waugh

GIVING LEVEL UP TO \$499

Monika Ahal
AmazonSmile
Diane Anderson
Anonymous (2)
Kathy Armbruster
Harry Banzhaf
Laura Barry
Greg & Sybil Bell
Patrick Bellegarde-Smith
Andi & Jack Bidwell
Leroy Billingsley
Jeanne Birch
Elizabeth Bradley
Beth Brandon
Virginia Brennan
Alan & Sally Brown
Barbara Brown Lee
John & Lisa Bryson
Lois Burant
Erin Burke
Margaret Carini
Central Wisconsin Window Cleaning
Virginia Chappell
Gregory Chrisafis
Joan Christopherson-Schmidt
Lee Coppernoll
John & Helen Curtis
Susan Derse Phillips*
Myrna Dittmer
Connie Doerr
Estate of Cesira Dolezalek
Jeanne Durnford & Juanita Mast
Rosalie Easton
Tom & Patricia Ehrmann
Ed Eldredge
Keshia Exum-Pryor
Brenton & Rane Field
Joanne Gennaro
Matthew & Melissa Geszvain
Ginny Goode
Donald Gore
Greater Milwaukee Foundation
Lois Grootwassink
Susan Grosse

Sharla Guinn
Ilse Haberer
David Hale
Milton Hamilton
Handeland Flooring
Kathleen Harley
Anne Hartkopf
David Hiller
Herbert Hiller
Maxine Hirmer
Sue Hoaglund
Chuck Ingwersen
Carolyn Jacobus
Liz Joehnk
Ann Jordahl
Bill Jordahl
Jean Kenwood
Fred & Joan Kessler
Barbara Kloman
Bill Lau
Steve & Sheri Lear
Lemberg Electric
Dan Lemminger
Lois LeVine
Patricia Lidicker
Pamela Mahnke
Sue Masland
Maureen McCabe
Maggie McCarthy
John McCluney & David Ogren
Jennifer Milkiewicz
Randy Miller & Jana Troutman-Miller
Sylvia Miller*
Jim & Diane Milner
Nancy Mitchel
Michelle Mooney
Robert & Sarah Nandor
Tom & Linda Neubauer
Parasol Alliance
Porter Parker Hutto
Francis Pastijn
Marva Pattillo
Ivan Peterlin
Greg Pfister
Michele Polvere
Sally Pratt
Roger & Barbara Quindel
Roger Ruggeri, Jr. & Andrea Wagoner

Continued >>>

Tribute and Memorial Gifts

January 1 – December 31, 2022

GIVING LEVEL UP TO \$499 (Cont.)

Saint John's On The Lake
Bridge Club
Ferne Scheffrin
Larry & Kathy Schnuck
Melinda Shallow
Hugh Simonsen
Helga Smith
Nancy Sommer
Dorothy Sparks
State Painting Co.
Mary Stefaniak
Richard Stefanik
Charles Sullivan
Ann Thibodeau
Don Thorson
Lynn Tolcott
Judith Tolan
Miles Vilski
Elizabeth Vogel
Berniece Warner
Geraldine Wind
William Wuesthoff

TRIBUTE GIFTS

In Honor of Renée Anderson
Monika Ahal
Steve & Cathy Carr
Keshia Exum-Pryor
Dan Lemminger
Matt & Alli Loyd

In Honor of Sybil Bell
Mark & Patricia Ruttum

In Honor of the 60th Wedding
Anniversary of Edward &
Joanne Filmanowicz
Gerry & Elaine Mainman

In Honor of Inez Gilbert's
95th Birthday
Barbara Shafon

In Honor of Milton Hamilton
Susan Ploetz

In Honor of Bill Lau
Tony & Pat Busalacchi

In Honor of Lloyd Lewis
Alice Kuramoto
Joe & Susan Mazza
John & Margaret Murphy

In Honor of Irene Lipo
Bill & Nancy Carpenter
Jean Parteka

In Honor of Matt Loyd
Elliot & Eve Lipchik

In Honor of Donna Spars
Mark & Patricia Ruttum

In Honor of
Jana Troutman-Miller
Joan Hardy

MEMORIAL GIFTS

In Memory of
Margaret Ann Adlam
Robert Adlam

In Memory of Ann Agard
Joe & Nancy Danas

In Memory of Lois Ahlhauser
Dick Bradley & John Stewig
Richard & Susan Lindberg
Mary Ellen Winter

In Memory of Thomas Arndt
Betty Arndt

In Memory of Madeleine
De Servien-Kenwood
Jean Kenwood

In Memory of Bill Doerr
Connie Doerr

In Memory of Bob Elsner
Nat Beckwith
Penny Egan
Richard & Susan Lindberg

In Memory of George Evans, Jr.
Julia Evans

In Memory of Gene Gilbert
Diane Anderson
Richard & Patsy Aster
Richard & Kay Bibler
Andi & Jack Bidwell
Dick Bradley & John Stewig
Beth Brandon
Tony & Pat Busalacchi
Shirley Connell
VA Downey
Joanne Gennaro
Leonard & DeeDee
Goldstein
Joan Hardy
Herbert Hiller
Kathy Kain
Steve & Sheri Lear
Lois LeVine
Carol & Len Lewensohn
Lloyd Lewis
Richard & Susan Lindberg
Timothy & Susanna Lodge
Ann MacIver
Joan Mandel
Cheri McGrath
Sandra Nieman
Suzanne Osetek
Dottie Palay
Susan Ploetz
Allen* & Patricia Rieselbach
Joseph & Michele Rifelj
Carol Ryan
Ferne Scheffrin
Bud & Sue Selig
Barbara Shafon
Morton & Naomi Soifer
Eleanor Swentkofske
Judith Tolan
Jane Zioli

In Memory of Beverly Gorsuch
Dick Bradley & John Stewig
Richard & Susan Lindberg
Ann MacIver

In Memory of
Josette Grossberg
Sidney Grossberg

In Memory of
Caroline Haig-Case
Sharla Guinn
Randy Miller &
Jana Troutman-Miller

In Memory of
Mizie Rolle Hanna, RN
Florence Dukes

In Memory of
William Edward Harley
Kathleen Harley

In Memory of Charles Harper
Dick Bradley & John Stewig
Pat Harper
Susan Ploetz
Jane Zioli

In Memory of John Haydon
Kathy Kain
Gerry & Elaine Mainman
Mary Ellen Winter
Jane Zioli

In Memory of
Herbert S. Heavenrich
Jill Heavenrich

In Memory of Edie Hibbard
Kathy Kain
Jane Reckmeyer

In Memory of Elizabeth Holtz
David Hiller
Richard & Susan Lindberg
Charles Sullivan

In Memory of Julia Hughes
Camille Bounocore &
Christopher Schmidt
Bob & Molly Canary
Joann Gannaway
Julia Smith Haydn
Kathy Kain
Ann MacIver
Northshore University
Health System: Pelvic
Health Therapy Department

Continued >>>

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Tribute and Memorial Gifts

January 1 – December 31, 2022

MEMORIAL GIFT

In Memory of Julia Hughes (Cont.)

Northshore University Health
System: Bannockburn
Rehab Services
Susan Ploetz
Michele Polvere
Ronald & Denise Pon
Harold Posniak &
Mary Olson
Dorothy Sparks
Mary Ellen Winter

In Memory of Anne LaBudde

Applied Systems
Paul & Maribeth Brunsell
Thea Brunsell
Richard & Susan Lindberg
Carol Ryan

In Memory of Nancy Laskin

Dick Bradley & John Stewig
The Laskin Family
Foundation
Jane Reckmeyer

In Memory of Bela Maroti

Angie Kopf
Richard & Susan Lindberg
Greg & Denise McCarthy
Norma Mitra

In Memory of Bob McCormick

Associated Bank
Ellen Debbink*
Donald Gore
Kathy Kain
Angie Kopf
Ann MacIver
Nancy Mayne
Jackie McCormick
Randy Miller &
Jana Troutman-Miller
William & Karla Rieth
Marge Ryan
Nancy Sommer
Saint John's On The Lake
Bridge Club
Charles Sullivan
Jane Zioli

In Memory of

Thomas E. Neubauer

Tom & Linda Neubauer

In Memory of Ab Nicholas

Jim & Betty Jo Nelsen

In Memory of Betty O'Neill

Joan McCracken

In Memory of Sophie Parker

Dick Bradley & John Stewig
Gail Coyer
John & Susan Brennan
John & Helen Curtis
Cher & Tony Driessen

In Memory of Sophie Parker (Cont.)

Greater Milwaukee
Foundation
Richard & Susan Lindberg
Porter Parker Hutto
Jane Reckmeyer
Barbara Stein
Julia Uihlein

In Memory of Elizabeth Pfeifer

Richard & Susan Lindberg
Mary Ellen Winter

In Memory of

Marvin & Adrienne Raday

David Raday

In Memory of Allen Rieselbach

Dick Bradley & John Stewig
Leonard &

DeeDee Goldstein

Joan McCracken
Susan Ploetz
Jane Reckmeyer

In Memory of Jerry Rochte

Tony & Pat Busalacchi
Penny Egan
Joan McCracken
Susan Ploetz
Mary Ellen Winter
Jane Zioli

In Memory of Fred Ruenzel

Richard & Susan Lindberg

In Memory of Jeanne Schmitz

Mike Schmitz

In Memory of Margery Senn

Greater Milwaukee
Foundation
John Klett &
Mary Nold-Klett
Richard & Susan Lindberg
Carol Rautmann
Claudette Robinson
Roxanne Trump Miles

In Memory of Don Shaw

Leonard &
DeeDee Goldstein
Marilyn Kosmider
Gerry & Elaine Mainman
Jane Reckmeyer

In Memory of Elaine Stalheim

Dick Bradley & John Stewig
Stalheim Family Fund
Scott Stalheim

In Memory of Sally Tolan

Betty Bostrom

In Memory of Renee Tolcott

Lynn Tolcott

In Memory of

Phyllis K. Wagoner

Roger Ruggeri, Jr. &
Andrea Wagoner



We thank **Jane Waldbaum and Steve Morse** for their generous donation of 21 colorful, original works which are on display in the North Tower Lobby and common areas. Jane's father, Max Arthur Cohn, was a prolific artist, painter, printmaker and author. We are honored to be able to add these pieces to Saint John's collection.

SAINT JOHN'S MISSION STATEMENT

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



Individuals who have named Saint John's as a beneficiary in their estate plans, assigned a portion of their residency refund to the Foundation or contributed to the opening of an endowment fund are members of our Legacy Society. Their generosity will support the work of the Foundation in a tangible expression of confidence in our commitment to aging well and lifelong learning. We extend thanks to all our members.

Renée Anderson & David Ham
Anonymous (2) **
Jon & Terrie Barsanti
Tom & Sally Basting
Art & Karen Beaudry
Richard Bibler
Richard Bradley & John Stewig
Susan Wright Brennan
Ellen Debbink*
Carol Erwin DeLind
VA Downey
Penny Egan
Gene* & Inez Gilbert
Claire Greene*
Jill Heavenrich
Sally Dohoney Holt
Bill & Char Johnson*
Barbara Kloman
Alice Kuramoto**
Lloyd (Alice) Lewis
Bela & Julie Maroti*
Kent Mayfield & Jack Ford

Mary McAndrews
Bart & Margaret McCown*
Richard Miller* & Miriam Reading
Erik & Carol Moeser
Jim* & Alice Nelson
Ab* & Nancy Nicholas
Patricia Parsons
Holger & Mary Beth Petersen
Susan Ploetz
Bob* & Marjorie Polack
Allen* & Pat Rieselbach
Marcia Slater Johnston (*)(**)
Donna Spars
Carolyn Sweers
Bill & Nicole Teweles*
Connie Tresch
Trustees of Funds & Endowments
Miles Vilski
Jim & Kathie Vint
Andrea Wagoner
Greg Wagoner

As of May 2023, Saint John's future Legacy gifts total \$1.7 million.

LEGEND: * Friends we lost
** new member