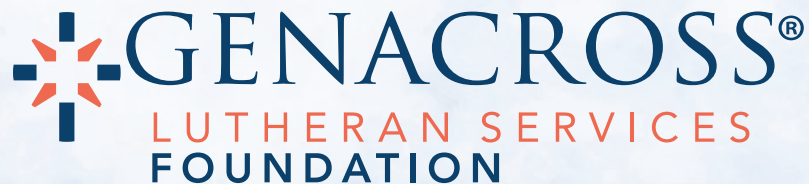


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**Genacross**

# *Promise*

**Living Our Values**

**2019 Annual Report**

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# Genacross Promise. Living Our Values.

As we reflect on the past year, the Genacross Lutheran Services Foundation thanks the individuals and congregations who have entrusted their funds to the Foundation. In addition, we thank our board members for their dedicated leadership in overseeing a sound investment strategy and ensuring the necessary systems are in place to allow for portfolio growth.

We also thank the individuals who have sponsored an endowment, as well as those who are considering establishing a new fund. Planned gifts provide funds for future endowment growth. Earnings from endowment investments have enhanced the mission and ministry of Genacross Lutheran Services. In 2019, endowment distributions were made of over \$160,000.

As Genacross responds to the evolving market, capital is necessary. It is incumbent upon the Foundation to ensure that funds exist for future endeavors. We assure you that the Foundation Board members will work toward this objective. Additionally, we pledge that the Foundation's vigilant oversight of the Genacross Lutheran Services endowment funds will continue.

At the close of 2019, the Foundation's consolidated portfolio value was \$19.2 million, an increase of \$2.8 million over the 2018 value. As we begin 2020, we are excited about the possibilities of future donor and congregational investments.

Thank you for your generous support of and commitment to the ministry of Genacross Lutheran Services. Together, we change the lives of more than 3,500 individuals.

Sincerely,



David Polzin, Chair  
Genacross Lutheran Services  
Foundation Board



Kathleen B. Lemmerbrock  
Executive Director  
Genacross Lutheran Services Foundation

**Portfolio  
Value  
\$19.2  
million**



## Foundation Mission Statement

**We embrace the ministries of Genacross Lutheran Services and faithfully manage fundraising and investment resources to provide for current and future ministry needs.**

# Foundation Board of Directors

The volunteers who serve as members of the Genacross Lutheran Services Foundation Board have the responsibility of ensuring a sustainable financial future for the ministries of Genacross Lutheran Services. They are financial management and nonprofit management professionals who provide sound governance and financial management policies, to ensure that Genacross will have both short- and long-term resources to advance its mission.

## Chair

David Polzin\* *Thrivent (Retired)*

## Vice Chair

Katrin McBroom\* *Semro, Henry & Barga, Ltd.*

## Secretary

Rev. Dr. Tim Philabaum *Zoar Lutheran Church, Perrysburg*

## Assistant Secretary/Treasurer

Rick Marshall\* *Genacross Lutheran Services*

Judy Ashley *Thrivent, Perrysburg*

Ron Gabel\* *Teledyne (Retired)*

Paula Hicks-Hudson *Ohio House of Representatives*

\*indicates members of the Foundation Investment Committee



Foundation Board members (left to right) Rev. Tim Philabaum, Katrin McBroom, Rick Marshall, David Polzin, Paula Hicks-Hudson and Ron Gabel. Not shown: Judy Ashley.

## Ron and Mary Lou Gabel



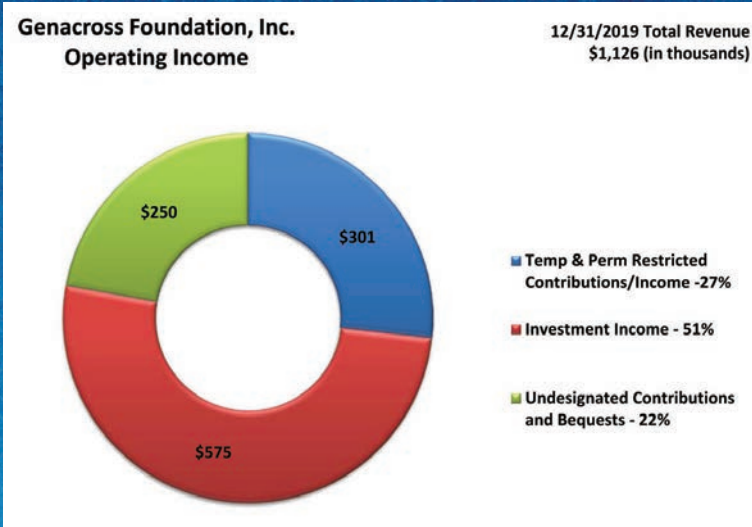
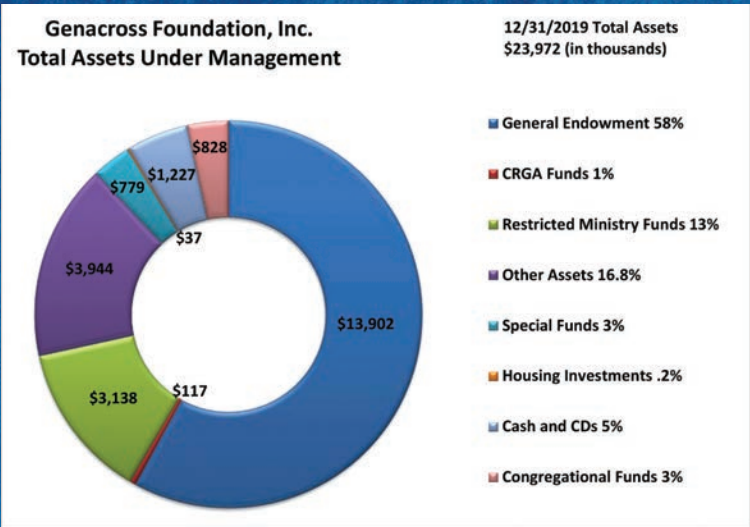
For 24 years, Ron Gabel has been a faithful volunteer for Genacross

Lutheran Services. A retired corporate executive with oversight of all engineering operations, Ron also has an extensive background in financial services. Ron's guidance to the Genacross Lutheran Services Foundation has been invaluable and instrumental to the growth and management of the Foundation.

Ron and his wife, Mary Lou, have sponsored a new endowment, The Ron and Mary Lou Gabel Memory Care Endowment, which will enhance and create programs and services to benefit Genacross residents and their families living with Alzheimer's disease and other memory-related conditions. According to the Alzheimer's Association website ([www.alz.org](http://www.alz.org)), every 65 seconds, someone in the United States develops Alzheimer's; by 2050, 14 million Americans are projected to have the disease. Ron and Mary Lou are committed to advancing the care of individuals with memory-related conditions. These funds, generously donated to Genacross, truly reflect the Foundation's philosophy of, "Together, we change lives!"



# 2019 Financials



## Foundation Gift Summary

We thank our donors for their financial contributions which enable Genacross Lutheran Services to provide compassionate care and services to our clients and residents.

### Matured Planned Gifts (41 gifts from 12 donors)

Perpetual Trusts	\$ 81,369
Estate Gifts	\$ <u>151,560</u>
Total Planned Gifts	\$ 232,929

### Total Annual Gifts (1,570 total gifts from 484 donors)

Designated by donor	\$104,181
Undesignated	\$ <u>97,727</u>
Total Annual Gifts	\$201,908

**TOTAL GIFTS     \$434,837**

For information on how to include Genacross Lutheran Services in your will and participate in the many planned giving options available, visit the Foundation section of the

website at [GenacrossLutheranServices.org/Foundation](http://GenacrossLutheranServices.org/Foundation), call 419.861.4965, or email [ABiel@Genacross.org](mailto:ABiel@Genacross.org).

# Current Endowments

Some donors have funded endowments in their names or in a name that reflects a commitment to a particular program or service. These endowments provide financial resources for both current and future needs as designated by the sponsor(s).

In 2019, the Foundation held the following endowments:

- \$316,504

**The Celia and Jim Findlay Endowment Fund**

Earnings are used for Genacross Family & Youth residents' tutoring needs.
- \$132,388

**The Youth Assistance Endowment Fund**

(anonymous sponsors)  
Proceeds are used for the needs of youth who will "age out" of the Family & Youth program funding, but will remain with Family & Youth for housing and related services.
- \$60,823

**The Staff Benevolence Endowment Fund**

Sponsored by David and Pamela Roberts, the proceeds are directed to be used by Genacross employees who have suffered financial hardship as a result of catastrophic loss.
- \$738,642

**The Lawrence and Adele Youngbauer Endowment**

This endowment was established to fund four annual scholarships to high school seniors pursuing careers in social service, health care or other service occupations. In addition, the funds are used for unbudgeted program needs.
- \$45,424

**The Bunge Youth Scholarship Endowment Fund**

This endowment was established to assist youth with educational needs and expenses.
- \$1,844,178

**The R.A. & F.D. Stranahan Endowment Fund**

This endowment was established to fund the capital needs of Family & Youth or, if not needed there, the capital needs of other ministries.
- \$3,137,959

**Total 2019 endowment market values**



## Board Member Giving

We value stewardship of resources when our board members serve as volunteers for the Genacross parent board and the individual ministry boards. In addition to their leadership contributions, the following board members donated to Genacross Lutheran Services:

Michael Bogdan	Judy Pfaffenberger
Kimberly Bordenkircher	Rev. Dr. Tim Philabaum
Robin Burkett	Jeanene Pifer
Jason Fisher	David Polzin
Ron Gabel	Rev. Richard Rentner
Rev. Richard Habrecht	Mary Satterfield
Rev. Keith Hunsinger	Rev. Logan Scheiwe
Eric Johnson	Duane Shively
Burt Luring	James Sommers
Rick Marshall	Christine Spohn
Ed Mauntler	Eileen Stough
Paul Nelson	Rev. Lori Strang
Marie Obrock	Lynn Warren
Lynn E. Olman	Lee Wunschel
Rev. Frank Paine	

# Doerfler Fellowship and CRGA Giving

Donors in this group, named after the organization's founding director, Rev. Johannes Doerfler, have pledged estate and other planned gifts or have invested in the Charitable Remainder Gift Annuity (CRGA) program with Genacross Lutheran Services Foundation.

Dale Avers	Darrell & Joyce Fox	Kathleen B.	Lynn & Joyce Olman	Janice & David
Harlan & Lois Billow	Ron & Mary Lou	Lemmerbrock	Delores M. Pratt	Serwin
Robert Bosse	Gabel	Sylvia Leonard	Miriam Ringquist	Duane Shively
Terry Bossert	Glenn Geldien	Dewayne & Bernice	Dave & Pam Roberts	Rev. James
Mary Bricker	Charlotte H. Kirk	Lohmann	Dean Roberts	VanBrussel
Robert & Darlene Cook	Dan & Julie Kunos	Wilma Lupe	Jim & Pat Roemer	Delores Van-Kirk
Dorothy A. Delker	Dorothy	Carol L. Meuser	Mary Satterfield	Steve & Susan Voigt
Hazel Deuble	Landskroener	Blair & Anita Miller	Tim & Heather Semro	Carole Wittenberg
Jean Emery		Mrs. Thomas Moon		

## Donor Appreciation Dinner Sponsors

Through the generosity of the following corporate sponsors, the Foundation is able to hold its annual Donor Appreciation Dinner. The Foundation is grateful for their benevolent support.

CWS Environmental, Perrysburg	Lee and Jan Odegaard, Perrysburg
ECS Billing & Consulting South, Inc./ ECS Solutions, Dublin	Plante & Moran, PLLC, New York, NY
The Employers' Association, Maumee	Signature Bank, N.A., Toledo
GlynnDevins, Richmond, VA	Teamsters Local 20, Toledo
Hylant, Toledo	Trust Company Family Offices, Holland
Marshall Melhorn, LLC, Toledo	

*The 9th annual Donor Appreciation Dinner was held in October at Parkway Place in Maumee.*



## Employee Giving

The generous employees who donated in 2019 are listed below. Their gifts show how they live out their values through financial support for our ministries.

Beverly Apel	Julie Krauss
James Beardsley	Molly Laux
Jason Beyer	Kathleen B.
Anne Biel	Lemmerbrock
Patricia	Rick Marshall
Blankenship	Melanie Moore
Stephen	Rev. Greg Olsen
Bowsher	Jeff Przysiecki
Kari Bucher	Jon Russell
Vicky Chambers	Lorinda Schalk
Angela Clay	Amanda
Diane Cline	Schroeder
Cheryl Daman	Jeff Schulte
Jenny Darr	Jane Sharp
Tamara Dawson-	Scott Slee
Kynard	Meg Stieber
Rev. Dr. Jim	Carol Taylor
Dumke	Wyatt Vaughn
Lori Fields	Bethany Watkins
Bruce Flory	Linda Weaver
Victoria Harris	Darlene Williams
	Katie Zawisza





## Nondiscrimination and Accessibility Requirements Notice

Genacross Lutheran Services complies with applicable Federal and State civil rights laws and does not discriminate on the basis of race, color, national origin, sex, age, disability or other protected classes. Genacross Lutheran Services does not exclude people or treat them differently because of race, color, national origin, sex, age, disability, creed, ancestry, gender identity or expression, marital status, lawful source of income, familial status, learning disability, or physical or mental disability.

Genacross Lutheran Services:

- Provides free aids and services to people with disabilities to communicate effectively with us, such as:
  - o Qualified sign language interpreters; and
  - o Written information in other formats (large print, audio, accessible electronic formats, Braille, other formats)
- Provides free language services to people whose primary language is not English, such as:
  - o Qualified interpreters
  - o Information written in other languages

If you need these services, contact Marty Jan, Senior Executive Director.

If you believe that Genacross Lutheran Services has failed to provide these services or discriminated in another way on the basis of race, color, national origin, sex, age, disability, creed, ancestry, gender identity or expression, marital status, lawful source of income, familial status, learning disability or physical or mental disability, you can file a grievance with: Marty Jan, Senior Executive Director, 2001 Perrysburg Holland Road, Holland, Ohio 43528, 419-861-5601, 419-861-2234 (fax), MJan@Genacross.org. You can file a grievance in person or by mail, fax, or email. If you need help filing a grievance, Marty Jan is available to help you.

You can also file a civil rights complaint with the U.S. Department of Health and Human Services, Office for Civil Rights electronically through the Office for Civil Rights Complaint Portal, available at <https://ocrportal.hhs.gov/ocr/portal/lobby.jsf>, or by mail or phone at: U.S. Department of Health and Human Services, 200 Independence Avenue SW, Room 509F, HHH Building, Washington, DC 20201, 1-800-868-1019, 800-537-7697 (TDD). Complaint forms are available at <http://www.hhs.gov/ocr/office/file/index.html>.

**English:** ATTENTION: If you speak [insert language], language assistance services, free of charge, are available to you. Call 1-888-546-7745 (TTY: 1-888-546-7745).

**Spanish:** ATENCIÓN: si habla español, tiene a su disposición servicios gratuitos de asistencia lingüística. Llame al 1-888-546-7745 (TTY: 1-888-546-7745).

**Chinese:** 注意: 如果您使用繁體中文, 您可以免費獲得語言援助服務。請致電 1-888-546-7745 (TTY: 1-888-546-7745)。

**German:** ACHTUNG: Wenn Sie Deutsch sprechen, stehen Ihnen kostenlos sprachliche Hilfsdienstleistungen zur Verfügung. Rufnummer: 1-888-546-7745 (TTY: 1-888-546-7745).

**Arabic:** مقرر لخدماتنا لغوية مجانية. إذا كنت تتحدث لغة أخرى، يمكنك الحصول على خدماتنا لغوية مجاناً. اتصل بنا على 1-888-546-7745 (TTY: 1-888-546-7745).

**Pennsylvania Dutch:** Wann du [Deutsch (Pennsylvania German / Dutch)] schwetzschts, kannst du mitaus Koschte ebber gricke, ass dihr helft mit die englisch Schprooch. Ruf selli Nummer uff: Call 1-888-546-7745 (TTY: 1-888-546-7745).

**Russian:** ВНИМАНИЕ: Если вы говорите на русском языке, то вам доступны бесплатные услуги перевода. Звоните 1-888-546-7745 (телетайп: 1-888-546-7745).

**French:** ATTENTION: Si vous parlez français, des services d'aide linguistique vous sont proposés gratuitement. Appelez le 1-888-546-7745 (ATS: 1-888-546-7745).

**Vietnamese:** CHÚ Ý: Nếu bạn nói Tiếng Việt, có các dịch vụ hỗ trợ ngôn ngữ miễn phí dành cho bạn. Gọi số 1-888-546-7745 (TTY: 1-888-546-7745).

**Cushite:** XIYYEEFFANNAA: Afaan dubbattu Oroomiffa, tajaajila gargaarsa afaanii, kanfaltiidhaan ala, ni argama. Bilbilaa 1-888-546-7745 (TTY: 1-888-546-7745).

**Korean:** 주의: 한국어를 사용하시는 경우, 언어 지원 서비스를 무료로 이용하실 수 있습니다. 1-888-546-7745 (TTY: 1-888-546-7745) 번으로 전화해 주십시오.

**Italian:** ATTENZIONE: In caso la lingua parlata sia l'italiano, sono disponibili servizi di assistenza linguistica gratuiti. Chiamare il numero 1-888-546-7745 (TTY: 1-888-546-7745).

**Japanese:** 注意事項: 日本語を話される場合、無料の言語支援をご利用いただけます。1-888-546-7745 (TTY: 1-888-546-7745) まで、お電話にてご連絡ください。

**Dutch:** AANDACHT: Als u Nederlands spreekt, kunt u gratis gebruikmaken van de taalkundige diensten. Bel 1-888-546-7745 (TTY: 1-888-546-7745).

**Ukrainian:** УВАГА! Якщо ви розмовляєте українською мовою, ви можете звернутися до безкоштовної служби мовної підтримки. Телефонуйте за номером 1-888-546-7745 (телетайп: 1-888-546-7745).

**Romanian:** ATENȚIE: Dacă vorbiți limba română, vă stau la dispoziție servicii de asistență lingvistică, gratuit. Sunați la 1-888-546-7745 (TTY: 1-888-546-7745).

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## Our Mission

Inspired by the Christian faith, we embrace individuals and families with compassionate care and services throughout life’s journey.

## Our Vision

Through our faith and work, we strive to be a forward-thinking, compassionate organization that improves the lives of current and future generations.

## Our Values

- |                        |                          |
|------------------------|--------------------------|
| Faithfulness to Christ | Integrity                |
| Equality and Justice   | Quality of Service       |
| Wholeness of Life      | Stewardship of Resources |

## Our Ministries

- Genacross Lutheran Services-Napoleon Campus
- Genacross Lutheran Services-Toledo Campus
- Genacross Lutheran Services-Wolf Creek Campus

### Genacross Home & Community Based Services

- |                        |               |
|------------------------|---------------|
| Bethany Place          | Luther Hills  |
| Covenant Harbor I & II | Luther Meadow |
| Kettle Run             | Luther Oaks   |
| Luther Crest           | Luther Pines  |
| Luther Grove           | Luther Ridge  |
| Luther Haus            | Luther Woods  |

- Genacross Adult Day Center
- Genacross at Home
- Genacross Family & Youth Services
- Genacross Lutheran Services Foundation

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