



OHIO PRESBYTERIAN
RETIREMENT SERVICES
FOUNDATION

CELEBRATING
25 YEARS
of donor generosity

ANNIVERSARY
25th

fiscal year 2011 annual report
(July 1, 2010 - June 30, 2011)

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

we believe in being **DONOR CENTERED:**

- Fostering relationships with our donors and prospects is key to our success.
- Gifts of all sizes create an enhanced quality of life for all those we serve.
- We are dedicated to sharing our gratitude with enthusiasm.
- Donors have the right to designate gifts and we are committed to carrying out their intent.

we believe in operating with **STEWARDSHIP & INTEGRITY:**

- We practice the highest ethical standards of fund development and fiscal stewardship, consistent with the Donor Bill of Rights.
- We have the obligation to review all gifts to ensure that they are in the best interests of the donor, Ohio Presbyterian Retirement Services, OPRS Communities, Senior Independence and the OPRS Foundation.
- Raising funds in a cost effective manner and presenting clear and timely financial information are essential.
- Assets must be carefully managed to earn competitive returns and safeguard the funds for the long term.

we believe in **CONTINUOUS ACHIEVEMENT:**

- Visionary, forward-thinking volunteers and staff are essential to our success.
- A team approach, collaborative environment and creativity are imperative for organizational growth.
- The continuing education of volunteers and staff is key to improving Foundation performance.
- We have a responsibility to educate our constituents about the charitable needs of OPRS, giving opportunities, and results of charitable gifts.

we couldn't have done it without you!

Twenty-five years ago, the OPRS Foundation was formed with big dreams and high hopes. Charitable giving had been a part of the OPRS culture since the organization was founded in 1922, but in 1986 it became an official part of the mission.

During the Foundation's first year, \$2.6 million was raised in support of OPRS – and we were thrilled! But we couldn't have imagined what was to come...

In 25 years, donors have given \$185 million in support of the older adults served by OPRS. Your generosity is simply astounding.

So in this year's annual report, we celebrate you – our donors – and the impact your generosity has had on our organization.



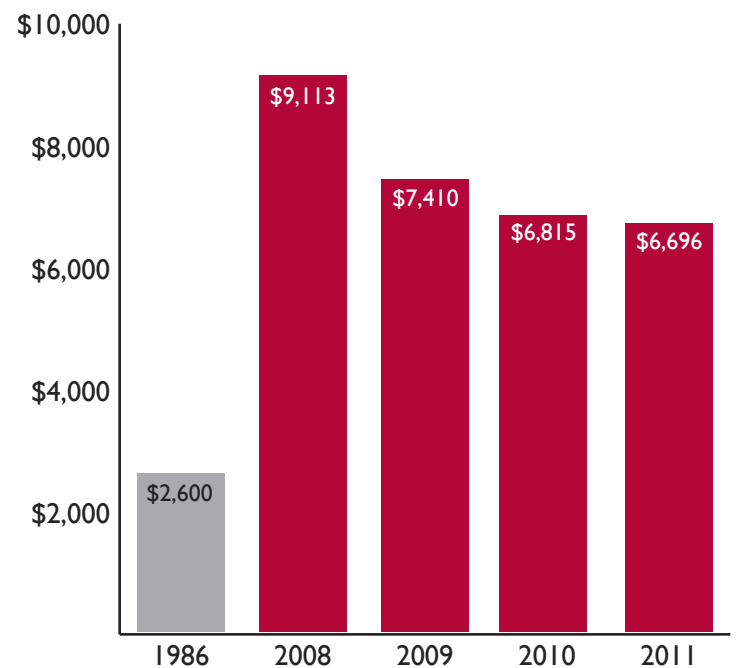
Let's see how far we've come...

Support for the OPRS mission has grown significantly since the OPRS Foundation's inception in 1986.

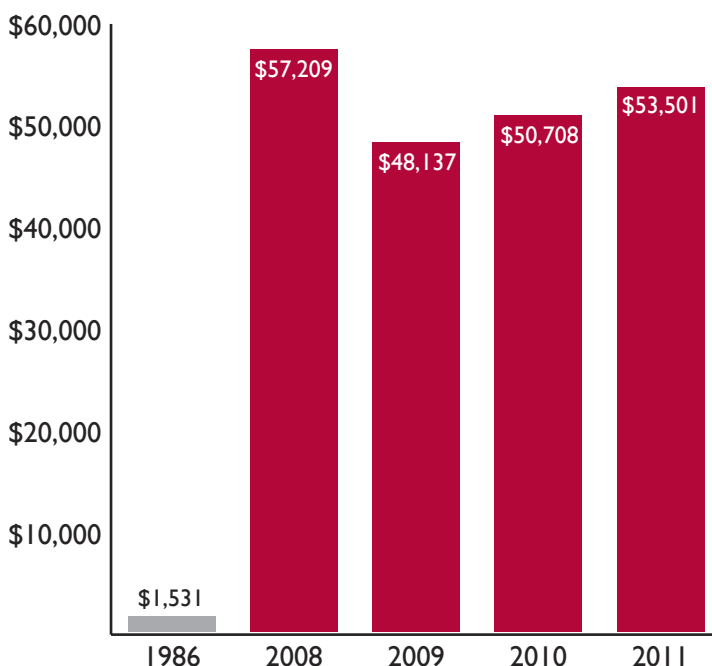
While some years in our history saw extraordinary results from campaigns or large estate gifts, the steadfast loyalty of our donors has been our greatest blessing.

Despite current economic challenges, we experienced another successful year; giving performance held relatively steady while total assets, total endowment and number of donors each increased.

Total Giving Performance (000s omitted)



Total Assets (000s omitted)



In fiscal year 2011 we continued our focus on research and planning, adapting our work in response to new economic realities.

We had an external review of our estate planning program, and incorporated the recommendations into our Strategic Plan.

An internal Case for Support was developed for overall fundraising operations, and a new OPRS Foundation mission statement, tag line and belief statements were launched on July 1, 2011.

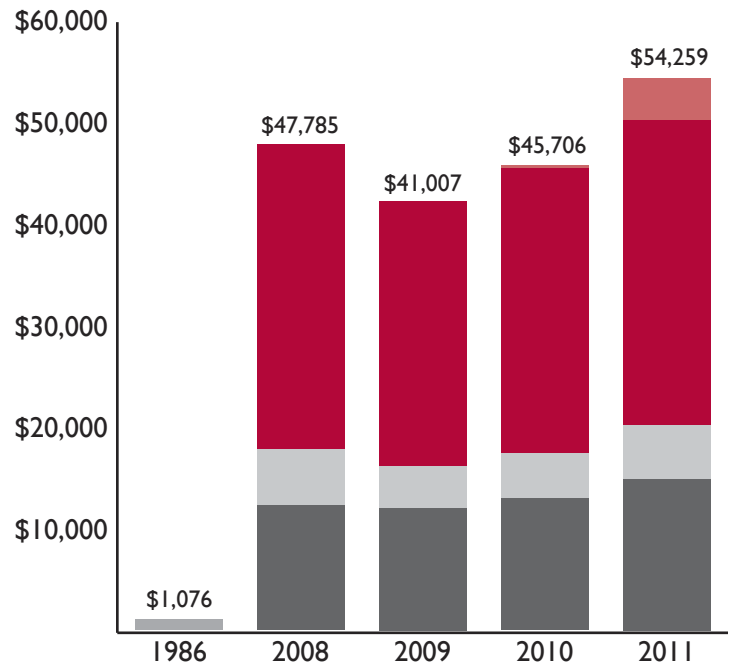
Endowment continues to grow, providing future security for the people and programs of OPRS.

Most notably, there are 25 Program Level endowments currently in place (endowment gifts totaling \$500,000 and above).

The most recent addition to this prestigious group is the Reed Whole Person Wellness Endowment at **Swan Creek Retirement Village**.

Endowment Total (000s omitted)

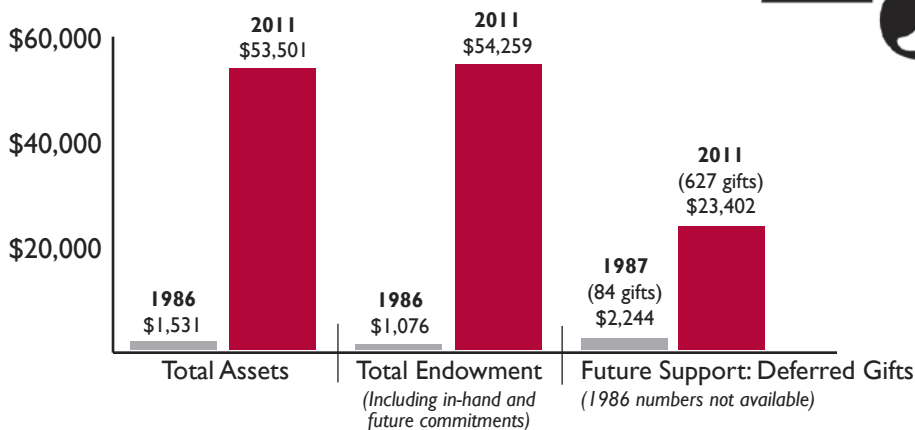
■ Pledged & Other ■ Annuities ■ Invested ■ Market Gain



total raised 1986 - 2011
\$185 million

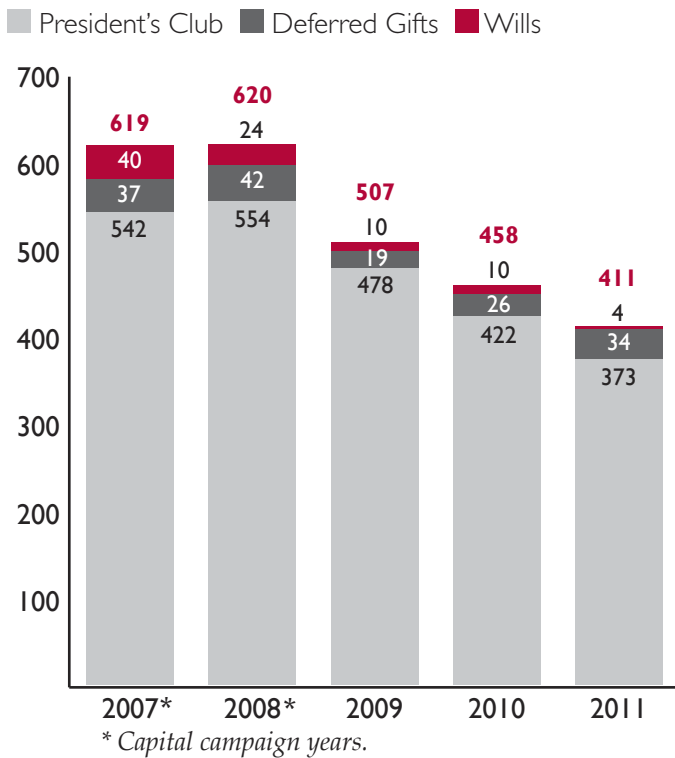
ANNIVERSARY
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(000s omitted)

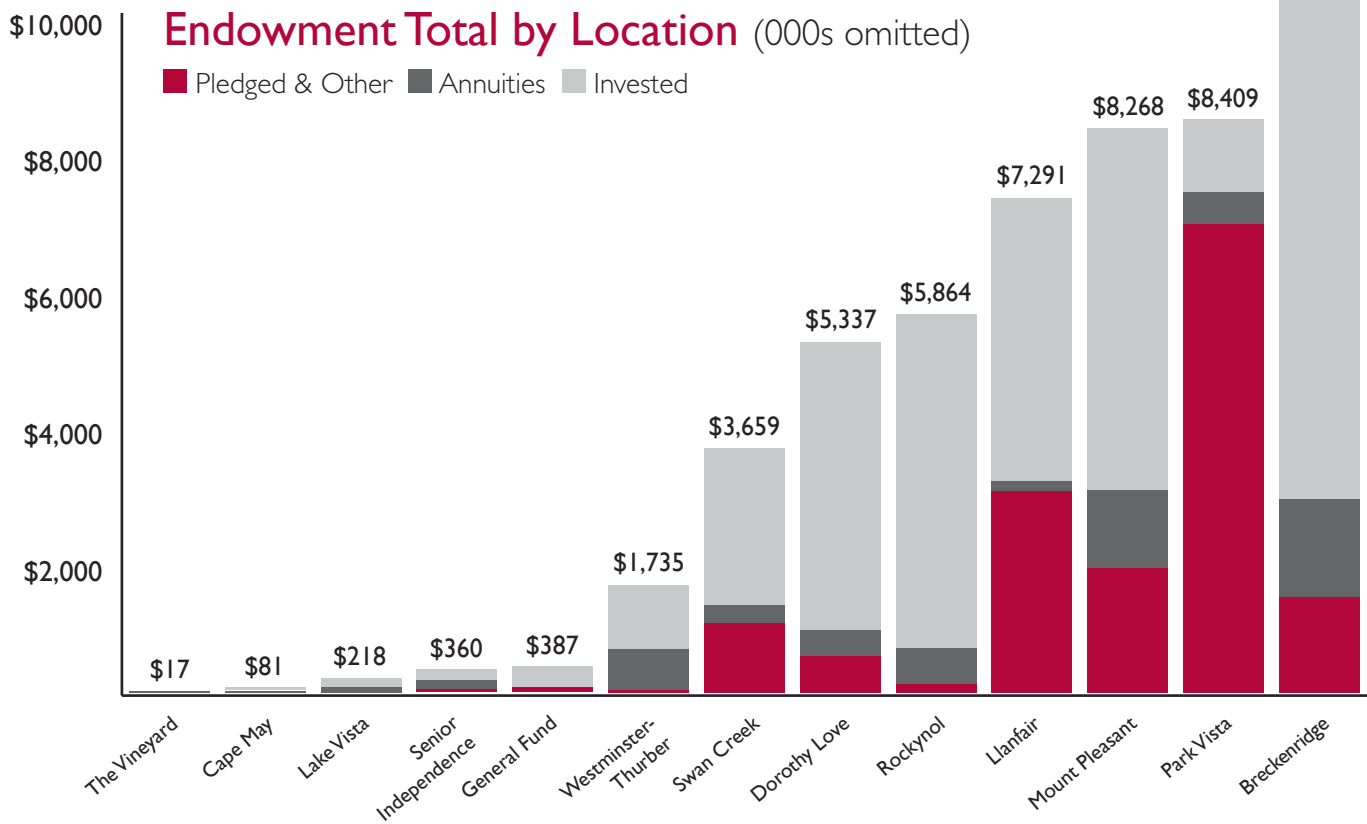


fiscal year 2011 performance and trends

Major Gift Trends

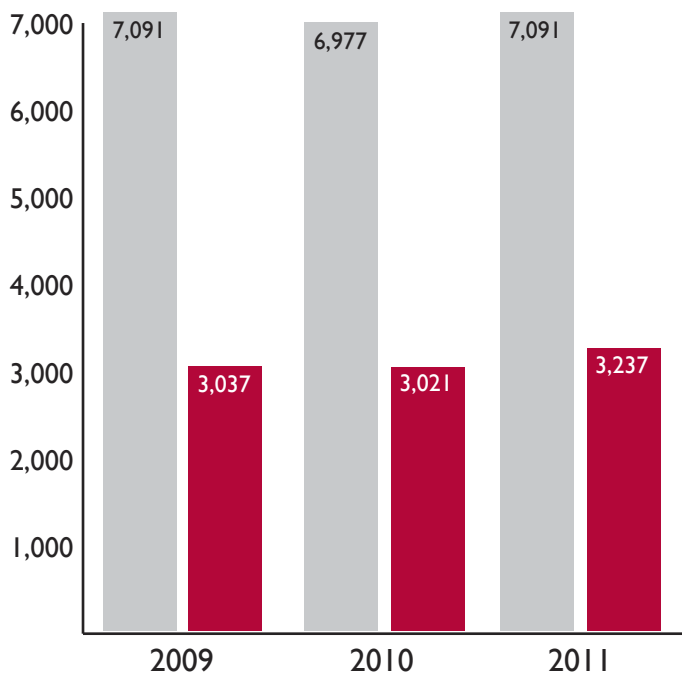


While the total number of major gifts has been declining since the culmination of The Mission, The Vision, The Promise Capital Campaign in 2008, we've experienced an increase in deferred gifts over the past three years. The number of individuals who continue to make lasting commitments to our organization leaves us optimistic about the strength of future support.



Total Number of Gifts & Donors

■ Gifts ■ Donors



Future Support



	# of Gifts	Total Value
Wills	184	\$5,887,448
Annuities	384	\$7,985,654
Trusts	20	\$6,327,747
Pooled Income	1	\$9,663
Insurance	2	\$37,000
Estate Notes	36	\$3,154,482
TOTAL	627	\$23,401,994

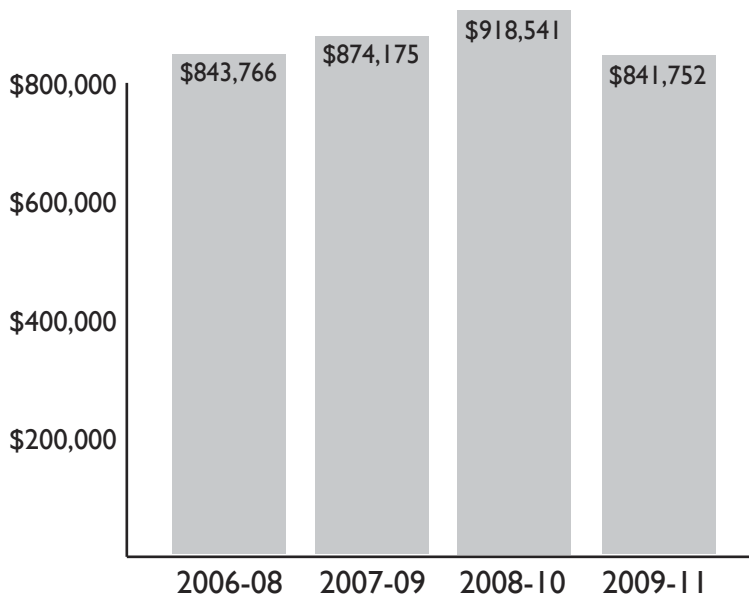
Investment Portfolio Performance



Cal. Year	Performance	Investment
2008	-20.27%	\$37,280,018
2009	20.73%	\$42,289,705
2010	12.58%	\$41,722,458

Senior Independence Giving Trends

(Three-Year Rolling Averages)



Senior Independence's broad spectrum of services continues to attract interest from grant funders and government agencies, despite a shift in funding priorities toward basic needs projects.

Also encouraging is that Senior Independence's hospice services are gaining support from individual donors. In fiscal year 2011, hospice giving from individuals increased more than 55 percent over fiscal year 2010's performance, a trend we hope will continue as hospice services expand.

simple gifts . . . extraordinary outcomes

The simple act of giving often results in profound benefits for both giver and receiver. Here's a sampling of how gifts have helped to enhance the lives of people throughout Ohio:

- Residents of the east wing of the health care center at **Dorothy Love Retirement Community** are enjoying recent renovations that make their living environment more like home.
- Upgrades to the special care dining room at **Swan Creek Retirement Village** mean that residents with Alzheimer's disease and other dementias have a more comfortable area in which to enjoy their daily meals.
- **The Vineyard on Catawba** expanded and renovated The Chalet assisted living building, bringing warm, cozy touches and larger resident rooms.
- **Mount Pleasant Retirement Village** and two adult day centers in **Senior Independence's Akron/Canton Region** implemented IN2L (It's Never Too Late) computer systems, giving residents and clients a fun and interactive tool for cognitive support.
- Residents are having fun, staying spiritually connected and getting fit since the opening of four major additions: The Veale Wellness & Aquatic Center at **Breckenridge Village**; the aquatic therapy area at **Park Vista of Youngstown**; the Reed Chapel and connector at **Swan Creek Retirement Village**; and the Resident Life & Arts Center at **Westminster-Thurber Community**.
- Individuals receiving rehabilitation services at **Llanfair Retirement Community** now have more therapy options with the addition of a Biodex Balance System, which assists individuals with balance, mobility and agility.
- Residents of Thurber Tower at **Westminster-Thurber Community** are enjoying a lovely covered entrance.
- Individuals in the Miami Valley are benefiting from two **Senior Independence iVillages**, which are lifelong communities with customized service plans that help keep older adults at home.
- Employees of **Senior Independence in the Mahoning Valley Region** are benefiting from a new laptop, projector and screen for their continuing education program.

- Residents around the state experience peace of mind through the Life Care Commitment, which helps assure all OPRS residents that they will always have a home in our communities even if – in good faith – they run out of the funds meant to see them through. Residents at **Park Vista of Youngstown** benefit from several large trusts that support Life Care annually.
- **Lake Vista of Cortland** residents are enjoying the shade and beauty of the pergola and trellis recently installed near the Haynam Walkway.
- Adult day center clients in **Senior Independence's Greater Toledo and Southwest Ohio Regions** are enjoying new furnishings.
- **Cape May Retirement Village** residents are enjoying a new dock at their pond as well as other capital improvements.
- When residents have been unable to sell their former homes, they've found that gifting them to the OPRS Foundation to fund a Charitable Gift Annuity (CGA) has been a smart move. The program, begun at **Rockynol**, frees the resident from the burdens and expenses of the property, while providing them with tax benefits and fixed annuity payments for life.
- Clients in **Senior Independence's Central Ohio Region** are receiving much needed transportation services to medical visits and other appointments.
- Older adults are able to maintain their independence and age in place with the help of volunteers from *Faith in Action of Lake County*, which works in conjunction with the parish nurse program of **Senior Independence in the Greater Cleveland Region**.



Thank you for all you've done to help enhance the lives of OPRS residents and clients, and their families.

Your generosity truly makes a lasting impact.

board of directors



FRONT ROW: Richard S. Reese | Louise F. Pence — *Chair* | William Dennler

MIDDLE ROW: Pauline M. Jernberg | Anne C. Cushnie | Cheryl A. Boyer | James H. Sisek | Allan L. Karchner | Michelle B. Tognetti | Elizabeth Ann Evans | David J. Kaasa — *OPRS President/CEO*

BACK ROW: Stanley R. Seagle | Edward S. Markel | John L. Gray | Stephen B. Croake | Richard L. Hart | Bruce Boyd | Rev. G. David Hawley

foundation board chairs 1986-2011

Herbert H. Schlater*
Calendar Years 1986, 1987

Roland P. Ely
Calendar Years 1988, 1989

Lewis E. Baughman*
Fiscal Years 1990, 1991, 1992

John L. Gray
Fiscal Years 1993, 1994

Sandy Shoemaker
Fiscal Years 1995, 1996

Donald R. Jackson
Fiscal Years 1997, 1998

William C. Shannon*
Fiscal Years 1999, 2000

Sue Mooney
Fiscal Years 2001, 2002

Judy D. McCormick
Fiscal Years 2003, 2004

Kristen J. Sydney
Fiscal Years 2005, 2006

Rev. Timothy F. Jones
Fiscal Years 2007, 2008

Cheryl A. Boyer
Fiscal Years 2009, 2010

Louise F. Pence
Fiscal Year 2011

** Denotes deceased*



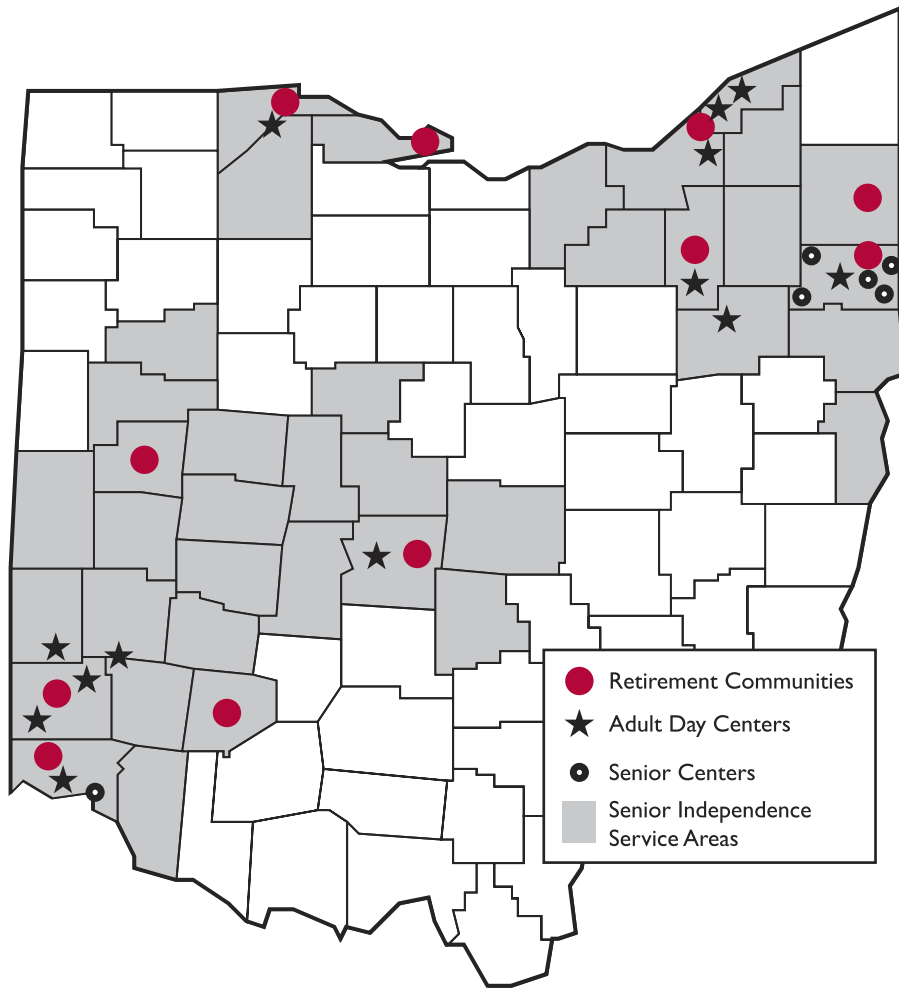
foundation officers

Pictured L-R: **Susan L. Ball**, Associate Vice President of Gift & Data Management | **Thomas G. Hofmann**, President | **Melissa A. Dardinger**, Associate Vice President of Communications | **Sue W. Welty**, Vice President of Gift Planning



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1001 Kingsmill Parkway, Columbus, Ohio 43229 | 1-800-686-7800

www.oprsfoundation.org