

# Annual Report

Fiscal Year 2016



**OHIO PRESBYTERIAN  
RETIREMENT SERVICES  
FOUNDATION**

*is now*



# Ohio Living

Foundation

Our name has changed; our mission,  
people and ownership remain the same.

## Why a new name?

Two years ago, the OPRS Board of Directors asked if our organization's name and brand were still serving us well. After extensive research we learned that there was a disconnect between the many brands within the OPRS system.

In fact, most people were unaware of the parent organization and the scope of its services.

Our recent rebrand is not the result of a change in ownership, merger or acquisition. Instead, it is the result of a thoughtful process that sought to honor our nearly 95-year history while remaining relevant to current and future generations.

We chose Ohio Living because we believe it embodies the essence of who we are as an organization – a community of people who celebrate living. It is our deepest desire to provide others with opportunities to live life to the fullest and make each day count. We believe this new name is an expression of our values and speaks to the principles we were founded upon, and we are proud to continue to honor our faith-based heritage.

Additionally, we believe this new brand will help to better position our organization in an ever-growing, highly-competitive senior living and health care marketplace. It will showcase our strengths and expertise, while remaining true to our mission and values. And it will allow us to be recognized as a leader in aging well.

With the name Ohio Living we will live our mission and values every day as we provide high-quality care and services to our residents and patients, helping them live life to the fullest.

We hope you share our excitement for this new direction as we move forward together as Ohio Living.



# 30 years of support, and going strong!

We may have a new name, but your generosity has been unwavering. Thank you for your support for our residents and patients!

No matter our name, we are **your** foundation. Since our establishment in 1986, we've been exceptionally blessed by the partnership of people like you who believe in our mission. In fact, throughout our history, donors like you have helped us reach some incredible milestones:

**\$224 million donated to benefit the people we serve**

**36 buildings or major spaces created through charitable gifts**

**167 Named Endowments**

Your work aligns perfectly with our new name, Ohio Living, as your charitable gifts help everyone we serve to live each moment to the fullest.

As we celebrate our 30th anniversary, we're proud of what we've accomplished together and look forward to what the future holds.



**Thomas G. Hofmann**  
Chief Foundation  
Officer



**John L. Gray**  
Chair, Foundation  
Board of Directors

FAITH ✦ COMPASSION ✦ COMMUNITY

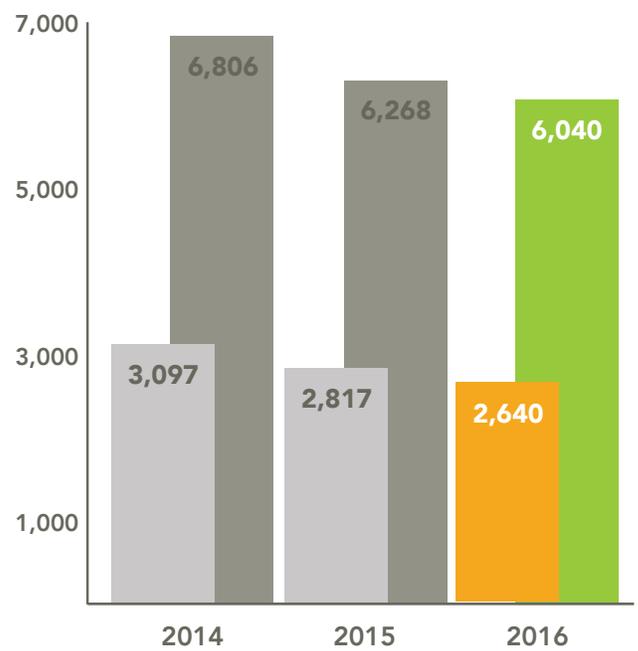
# Financial performance

Fiscal Year 2016 (July 1, 2015 – June 30, 2016)

## Total giving performance (000s omitted)



## Total gifts & donors ■ Gifts ■ Donors

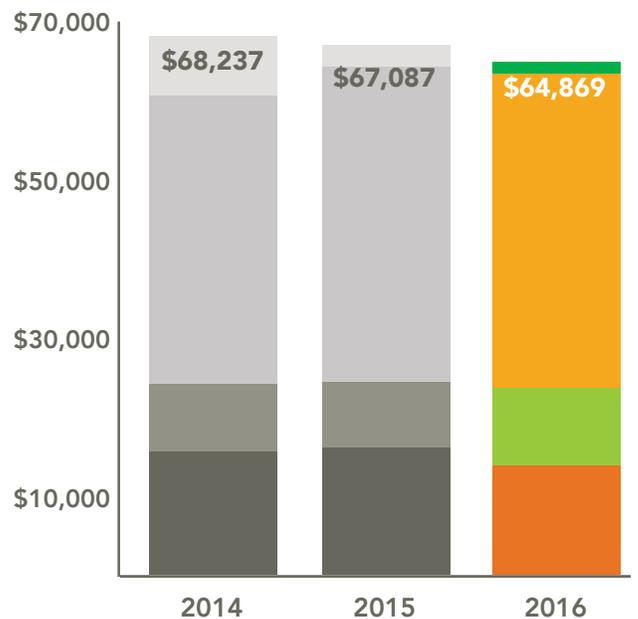


## Total assets (000s omitted)



## Total endowment (000s omitted)

■ Pledged/Other ■ Annuities ■ Invested ■ Market Gain

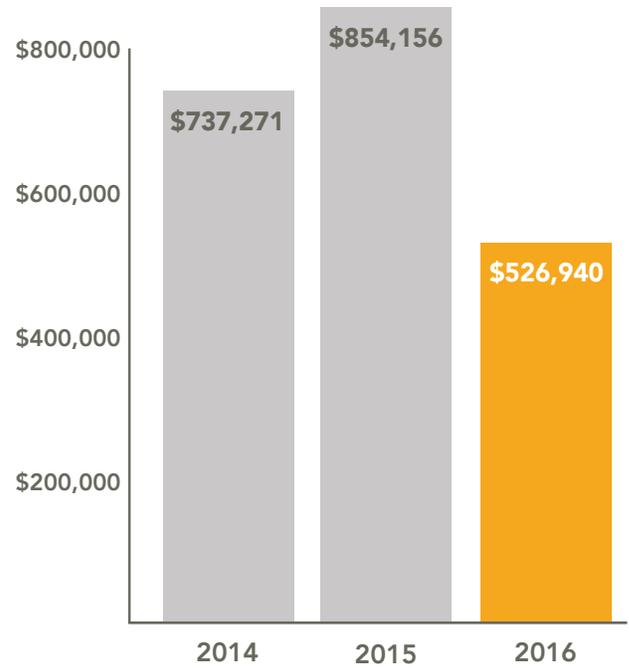


## Investment portfolio performance

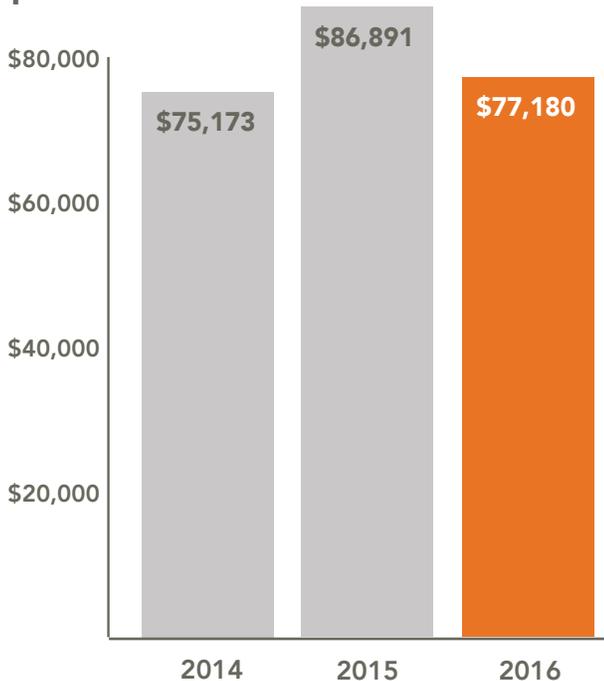
(based on calendar year)

	Performance	Investment
2015	-1.21%	\$48,005,455
2014	2.79%	\$50,626,043
2013	14.24%	\$49,038,624

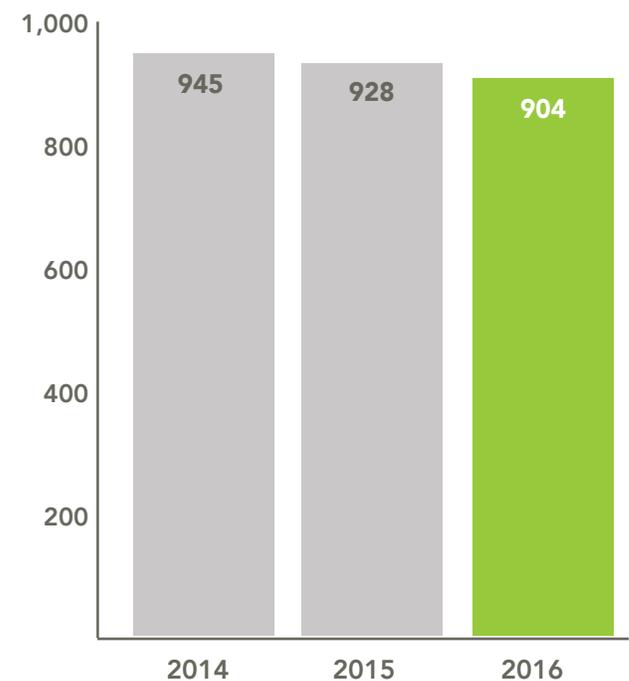
## Home health & hospice total giving performance



## Hospice annual giving performance



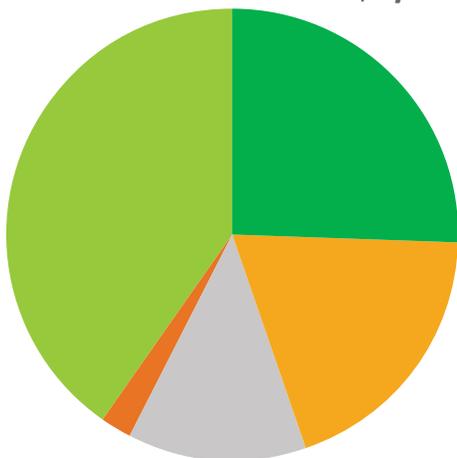
## Hospice donors



## Gift designations

### Communities

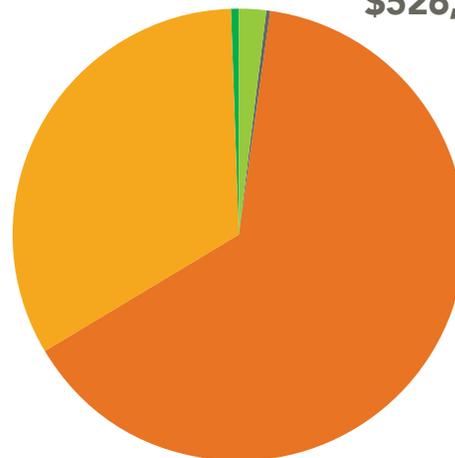
\$6,643,750



■ Life Care ■ Capital improvement  
■ Campaign ■ Program ■ Endowment

### Home health & hospice

\$526,940

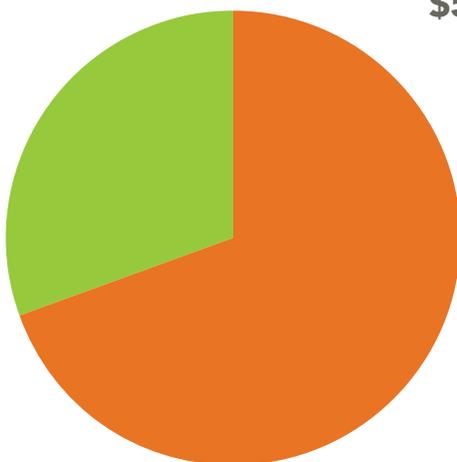


■ Program ■ Hospice ■ Endowment  
■ Charity care ■ Capital improvement

## Grant support highlights

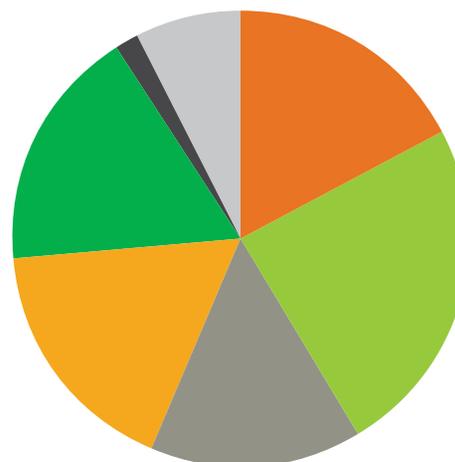
### Total grant support in FY16

\$515,831



■ Home health & hospice  
■ Communities

### Grants by projects



■ Personal care & basic needs  
■ Transportation ■ Adult day services  
■ Programming ■ Capital needs & operations  
■ Charitable care ■ Hospice

## Key Accomplishments

In fiscal year 2016, donors like you partnered with us to support the people, projects and programs of Ohio Living. Here are some of the things we accomplished together:

- Donors generously gave \$7,070,690 in fiscal year 2016, and assets remained strong at more than \$70 million.
- An External Fundraising department was created to explore corporate giving and facilitate innovation throughout Ohio Living.
- Ohio Living Swan Creek launched a \$1.5 million campaign for exterior improvements and endowment.
- Ohio Living Lake Vista finished a successful first campaign, raising more than \$426,000 for spiritual life programming, chaplaincy and endowment.
- Ohio Living Park Vista dedicated the Gelhaar Center and Mahoning Valley Lifelong Learning Institute after finishing a successful \$1 million campaign.
- Ohio Living Dorothy Love broke ground on the Sargeant Family Center for Aquatic Therapy & Rehab after raising \$1.5 million, surpassing its campaign goal by more than seven percent.
- Ohio Living Mount Pleasant held a grand opening for its newly expanded rehab center, made possible by charitable giving.
- Hospice fundraising was strengthened by the establishment of collaborative teams of Foundation and hospice operations staff, and in-service trainings for all hospice employees throughout the state.
- A Future Fundraising Task Force addressed changes in the fundraising environment and how to respond for future success.

**Our purpose is to partner with donors to support the people, projects and programs of Ohio Living.**

# Fiscal Year 2016 Board of Directors

**Front row:** Richard B. Uhle, Jr. | John L. Gray, Chair | Richard W. Mack, Vice Chair | Sandra M. Adam, Assistant Treasurer

**Middle row:** Kathryn Gonser Eloff | Maria Tarbell | Keith D. Boone | Dean E. Feldmeyer | David J. Jenkins | Robert E. Fischer | Martha Bixler Milligan

**Back row:** Thomas G. Hofmann, Ohio Living Foundation Chief Foundation Officer | J. Brann Young | Michael J. Kowalek | Michael Jagodzinski | Terry L. Hill | Robert E. Parker | Laurence C. Gumina, Ohio Living Chief Executive Officer | Andrew Singer | David Thompson Morgan

*Not pictured: G. David Hawley, Assistant Secretary*

