“The pessimist complains about the wind. The optimist expects it to change. The leader adjusts the sails.”
John Maxwell, respected author and leadership consultant, is attributed with the quote on the cover. The metaphor of “adjusting the sails” captures the philosophy of our activity throughout fiscal year 2009, fine-tuning several aspects of our operation to remain successful during these challenging times. With a focus on our core strengths, a “back to basics” attitude and a clear direction, we’ve moved beyond the capital campaign to a new era of donor collaboration.

We have also “adjusted the sails” to bring you this condensed fiscal year 2009 Annual Report for the Ohio Presbyterian Retirement Services (OPRS) Foundation. We’ve reduced the number of pages and production quality of the report to save on cost, while still providing the same detailed performance information you expect from us.

As you’ll see, you’ve helped us to report another great year, providing essential support for the more than 65,000 older adults served last year by OPRS.

Thank you for your partnership, your friendship and your support!

Our mission is to support the older adult services of OPRS by nurturing a philanthropic environment that fosters generosity, volunteer involvement, donor relations and stewardship.
The OPRS Foundation Board of Directors has been working diligently throughout fiscal year 2009 to transition fundraising efforts from capital campaign work to an ongoing focus on major and planned gifts. The three board committees (Fundraising Advisory Committee, Investment Committee and Planning/Communications Committee) have each guided efforts of staff and statewide volunteer councils, resulting in the following key accomplishments:

- A total of **$7.4 million** was raised in fiscal year 2009. While this total was below our expectations, it remains a positive affirmation of the importance of our mission and the commitment of our donors, even during a challenging economy.

- Diligence in investment oversight continues to pay off, with annuity and endowment funds regularly performing better than market indices. Quarterly investment summary reviews, along with detailed reports from investment managers, provide the information needed to make timely and ongoing adjustments.

- Safeguards were initiated for the endowment fund including lowering the endowment-spending policy from 5% to 4.5%. While this means that OPRS communities receive a slightly lesser amount from their endowments each year, the change makes a large impact on protecting the endowment principal from market downturns.

- Senior Independence fundraising grew 33% over that of fiscal year 2008, to reach a total of **$1.084 million**. In addition, formalized hospice fundraising programs were initiated with guidance from the Hospice Fundraising Council.

- Under the direction of the PR/Media Council, an online Newsroom was launched on www.oprs.org for journalists and other media professionals. The Newsroom includes press releases, story ideas, OPRS facts, logos for download and more.

- The first statewide Spiritual Life Summit was held, planned by the Church Relations Council. This Summit brought together chaplains, representatives of the campus Spiritual Life Committees, members of the Church Relations Council and staff.

- The Campus Fundraising Council guided efforts to initiate a Foundation Ambassador volunteer structure, to begin in fiscal year 2010. This change resulted from the Council’s feedback that there was a need to take a more individualized approach to volunteer service.
**Fiscal Year 2009 Performance and Trends**

### Total Giving Performance
(000s omitted)

<table>
<thead>
<tr>
<th>Year</th>
<th>President’s Club</th>
<th>Deferred Gifts</th>
<th>Wills</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>$8,589</td>
<td>$7,613</td>
<td>$13,325</td>
</tr>
<tr>
<td>2006</td>
<td>$7,613</td>
<td>$9,113</td>
<td>$13,325</td>
</tr>
<tr>
<td>2007</td>
<td>$9,113</td>
<td>$7,410</td>
<td>$13,325</td>
</tr>
<tr>
<td>2008</td>
<td>$7,410</td>
<td>$9,113</td>
<td>$13,325</td>
</tr>
<tr>
<td>2009</td>
<td>$7,410</td>
<td>$9,113</td>
<td>$13,325</td>
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</tbody>
</table>

### Total Assets
(000s omitted)

<table>
<thead>
<tr>
<th>Year</th>
<th>President’s Club</th>
<th>Deferred Gifts</th>
<th>Wills</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>$50,087</td>
<td>$52,712</td>
<td>$61,552</td>
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<tr>
<td>2006</td>
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<tr>
<td>2007</td>
<td>$57,209</td>
<td>$48,137</td>
<td>$61,552</td>
</tr>
<tr>
<td>2008</td>
<td>$48,137</td>
<td>$49,411,063</td>
<td>$61,552</td>
</tr>
<tr>
<td>2009</td>
<td>$49,411,063</td>
<td>$49,411,063</td>
<td>$61,552</td>
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</tbody>
</table>

### Major Gift Trends

- **President’s Club**
- **Deferred Gifts**
- **Wills**

### Investment Portfolio Performance

<table>
<thead>
<tr>
<th>Calendar Year</th>
<th>Performance</th>
<th>Investment</th>
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<tbody>
<tr>
<td>2006</td>
<td>8.94%</td>
<td>$44,287,278</td>
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<tr>
<td>2007</td>
<td>7.84%</td>
<td>$49,411,063</td>
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<tr>
<td>2008</td>
<td>-20.27%</td>
<td>$37,280,018</td>
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</table>

### Future Support

<table>
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<tr>
<th>Type</th>
<th>Number of Gifts</th>
<th>Total Value</th>
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<tbody>
<tr>
<td>Wills</td>
<td>195</td>
<td>$3,537,948</td>
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<tr>
<td>Annuities</td>
<td>428</td>
<td>$10,483,107</td>
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<tr>
<td>Trusts</td>
<td>17</td>
<td>$6,153,551</td>
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<tr>
<td>Pooled Income</td>
<td>3</td>
<td>$68,880</td>
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<tr>
<td>Insurance</td>
<td>2</td>
<td>$37,000</td>
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<tr>
<td>Estate Notes</td>
<td>29</td>
<td>$2,112,424</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>674</strong></td>
<td><strong>$22,392,910</strong></td>
</tr>
</tbody>
</table>
Look for the annual list of leadership donors in the OPRS Annual Report, published each November and mailed to all donors.
We Believe...

- Fostering relationships with our donors and prospects is key to our success.
- Gifts create an enhanced quality of life for all those we serve.
- In practicing the highest ethical standards of fund development and fiscal stewardship.
- Volunteers should be involved and play a major role in fund development.
- In the continuing education of volunteers and staff to improve the overall Foundation program.
- The Foundation has the obligation to review all gifts to ensure that they are in the best interests of the donor, the local retirement community, Senior Independence and the Foundation.
- In donors’ rights to designate gifts and we are committed to carrying out their intent.
- In raising funds in a cost effective manner and in presenting clear and timely financial information.
- The assets of the Foundation must be managed to earn competitive returns and safeguard the funds for the long-term.

Front Row: Richard S. Reesey, Cheryl A. Boyer - Chair, Jean E. Evans - Vice Chair, William Dennler

Middle Row: Rev. James Graham, Elizabeth Ann Evans, Pauline M. Jernberg, James P. Bruner, James Sisek, Louise Pence, Michelle B. Tognetti, Patricia Cash, David J. Kaasa - OPRS President/CEO

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Serving Cape May, Dorothy Love, Llanfair, Mount Pleasant, Westminster-Thurber and Senior Independence

Stow Office
4502 Darrow Road
Stow, Ohio 44224
1-800-362-3187
Serving Breckenridge, Lake Vista, Park Vista, Rockynol and Senior Independence

Maumee Office
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Maumee, Ohio 43537
1-800-826-9655
Serving Swan Creek, The Vineyard on Catawba and Senior Independence

www.oprsfoundation.org

foundation
officers

Thomas G. Hofmann
President
OPRS Foundation

Sandra M. Simpson
Vice President
Public Relations/Communications

Sue W. Welty
Vice President
Gift Planning

Susan L. Ball
Associate Vice President
Gift & Data Management

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