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BRIO LIVING SERVICES AND UMRC-PORTER HILLS FOUNDATION ANNUAL REPORT JULY 1, 2023 THROUGH JUNE 30, 2024



Meadowlark Executive Director Bruce Lyon with resident and Applefest Queen Joyce Dupras.





Brio Living Services

MISSION: Welcoming all, partnering together, enriching lives.

VISION: A world in which all are empowered to age well.



Mission and Gratitude

A Letter from Steve Fetyko, President & CEO, Brio Living Services and Russ Ives, Board Chair, Brio Living Services

ou may have heard the statistics around aging in our state. One of the most compelling is the following: in 2025—this year—Michigan's older adults 65 and up will outnumber children 18 and younger for the first time in history, a decade ahead of the national aging projection. This year, the oldest Baby Boomers will celebrate their 79th birthdays. By 2044, the population of adults over age 75 will double.

These statistics are not cause for alarm, but should make all of us consider how to best provide the care and services that older adults need and desire—both now and in the next few decades. How do we also encourage the next generation of direct care workers to choose aging services as a career, with fewer young people overall in our state?

At Brio Living Services, we are proud to serve 8,000 older adults annually across Michigan—from Detroit on the east to Muskegon on the west. We are grateful to all our extraordinary team members for the work they do in all areas of our organization to ensure the best possible care for those we serve. How fortunate we are that so many of our team members talk about their work as something they feel called to do.

We are also blessed with the support of the UMRC-Porter Hills Foundation and its pillars, including: Team Member Support Services, offering Scholarship opportunities and Emergency Aid that shows our team members how much we care about them; Capital Improvements and Life Enrichment, helping Brio Living Services to grow and be innovative to meet the changing needs of older adults; and Benevolent Care at the heart of all we do, ensuring continued love and care for eligible residents who outlive their resources.

We are grateful to each of you for your generous support as we lead this critical mission for older adults and our team members.

In Service,



Steve Fetyko
President & CEO
Brio Living Services



Russ Ives
Board Chair
Brio Living Services

UMRC-Porter Hills Foundation

MISSION: As faithful, philanthropic stewards and steadfast advocates for vibrant aging, we support the mission of Brio Living Services.



A Letter from Kelli Smith, President & CEO, UMRC-Porter Hills Foundation and Reezie DeVet, Board Chair, UMRC-Porter Hills Foundation

s we begin 2025, we are overcome with a deep sense of gratitude for each of you! Thanks to you, the UMRC-Porter Hills Foundation was able to accomplish so much over the past year to support vibrant living for those we serve! Your outpouring of love and caring for the wellbeing of older adults is inspirational, with gifts to the UMRC-Porter Hills Foundation totaling more than \$9 million last year!

Our communities are richer when we engage and include older adults in every facet. Yet, older adults in our culture often go unnoticed, even though they are the fastest growing group in our state and in the country. Aging is a journey to be celebrated and revered. All of us benefit when we appreciate the beauty, breadth, and diversity of experience and wisdom that older adults possess and the incredible ways they make our society more vibrant.

Philanthropy from friends like you helps support those we serve—and those WHO

serve—through our four fundraising pillars, including Capital Improvements, Life Enrichment, Team Member Support Services, and Benevolent Care, our cornerstone of providing continued care for qualified residents who outlive their savings. Your generosity contributes to the joy of our mission and, for that, we are exceedingly thankful.

With gratitude,



Kelli Smith, CFRE President & CEO UMRC-Porter Hills Foundation



Reezie DeVet Board Chair UMRC-Porter Hills Foundation

Gold Transparency **2024**

Candid.

he UMRC-Porter Hills Foundation recently earned the *Candid Gold Seal of Transparency* on GuideStar!

This symbol reflects our Foundation's integrity and stewardship, and we are grateful for your trust and support of our mission of caring for older adults.

Meet Our Donors







Pat Winton Remembers Wife, Elaine, and Honors Her Caregivers

e did everything together. She was my first mate," says Pat Winton of his wife, Elaine, who passed away in February 2024 after living with frontotemporal dementia for seven years. Pat's great appreciation for the care Elaine received at Chelsea Retirement Community's Towsley Village Memory Care Center has led him to make a pledge to support the UMRC-Porter Hills Foundation's Team Member Support Services Fund. This fund provides resources for team member Scholarships and Emergency Aid. After Elaine's passing, he knew this was something he wanted to support.

"Elaine was so well cared for in the Fall Neighborhood [at Towsley Village]," Pat shares. "Renae Tomshany and so many others took such good care of her. At the end, if Renae was working in another neighborhood, she would still come and check on Elaine."

Pat and Elaine were married for 62 years. They met in Flint, MI while Pat was a student at General Motors Institute (now Kettering) where he earned his degree in mechanical engineering. He later received his master's degree from Wayne State University. Pat's career began at GM, then led him to management, and finally as president and coowner of Globe Tool and Engineering Co. in Dayton, Ohio. Their three children also work in the engineering field.

Pat and Elaine loved to travel, often as part of Pat's work which took him to many parts of the world. As Pat neared retirement age,



Elaine and Pat Winton

he started a new career with his U.S. Coast Guard 100-ton captain's license. He and Elaine would spend weeks each summer cruising the Great Lakes where they logged thousands of hours on their boat, the Eleana, named for Elaine and their daughter, Deanna. They also sailed boats from boat building companies to deliver them to their buyers.

A resident of Brio's **The Cedars of Dexter** since 2019, Pat enjoys his independence there, yet it was close enough to CRC that he could be with Elaine each day. Pat is involved with the Cedars Chips writing group, started by a former Cedars resident, Paul Schubert. As a result, Pat has written a book, *Farmed Out in Ontonagon County*, which tells of his difficult childhood.

"I hope my story of overcoming adversity will help someone realize that they can persevere and be successful overcoming problems in their own life."





Vibrant Living

June Marshall Supports Quality Music at Porter Hills Village



t was bitterly cold outside but, inside, toes were tapping and hands clapping at Porter Hills Village on January 9. Residents were treated to an outstanding jazz concert by the Terry Lower Trio, courtesy of Shoreline Music Society and generous donors to the UMRC-Porter Hills Foundation, including fellow resident June Law Marshall.

June is a retired professor of voice at Aquinas College. She has been involved in a variety of musical groups and projects, including St. Cecilia Music Center in Grand Rapids and singing with the Shrine Band, Grand Rapids and Ann Arbor Symphonies, civic theatre, and church choir. She also played a part in launching the Grand Rapids Opera. So she knows good music when she hears it.

"Music soothes the soul," says June. "Our residents deserve the chance to enjoy quality music, and these concerts are fabulous. I tell everyone how exceptionally good they are. I invited three of my friends who love jazz to come today. They can't wait to come back!"

Porter Hills Village has been June's home for 19 years. She and her second husband, Bob Marshall, moved there in 2006. Both of them had been widowed and attended the same church. Because of Bob's poor health, they

chose Porter Hills Village because of "its good reputation for continued care," says June. "We were lucky to move into our brand new townhouse the day after it was completed!"

Bob passed away in 2011, and June continues to enjoy their townhouse with her dog, Henry: "The people are so friendly, and there is always something to do. If something goes wrong, the staff fixes it. It's a really good place for retirees.



June Marshall and the Terry Lower Trio

"The UMRC-Porter Hills Foundation is the backbone of Porter Hills Village, and I have been very happy to donate to the Benevolent Care Fund and to support team members who provide such excellent care," June says. "I am glad that Bob and I chose Porter Hills Village and I know that, if needed, thanks to the Foundation, I will be taken care of in the same way that Bob was taken care of."

Donations are making quality live music a reality at Cook Valley Estates and Chelsea Retirement Community as well. To learn more, contact the Foundation at Advancement@UMRCPH.org

Team Member Scholarships...

David Lovejoy: 'Education is always a benefit.'



David Lovejoy

avid Lovejoy, from Clinton, Michigan, is an HVAC Specialist at Brio's Chelsea Retirement Community (CRC) campus. He began five years ago in a facility support position, then quickly became part of the maintenance department where he could show his

mechanical skills and his willingness to lend a hand whenever needed, says Josh Kephart, CRC's Facility Maintenance Manager. "When the HVAC Specialist position became available, we knew David would be a great fit."

In 2022, David enrolled in the HVAC program at Washtenaw Community College, thanks to a scholarship from the UMRC-Porter Hills Foundation's **Team Member Support Services Fund**. David graduated in December with his residential HVAC certification.

"I spread out the program over three years, with work and family," says David. "I've been working in HVAC for a long time, building my skills. The coursework helped me pull my knowledge all together. It's really been beneficial. My bosses, Josh Kephart and Alan DeVaughn, Director of Environmental Services, encouraged me to go to school and were flexible with me."

In David's role at CRC, he maintains and diagnoses all of the HVAC equipment on campus. Last year, he assisted with the furnace upgrades for all the CRC residents in Dancey House Independent Living, made possible through an anonymous gift. Eventually, he plans to complete the commercial HVAC certification as well.

His favorite part of his job is assisting the residents of CRC. "I get gratification in fixing their appliances and being able to help them when they're stressed or uncomfortable. I'm glad to be able to give that comfort back to them."

David says he's enjoyed every minute of his work at CRC and now his brother, Luke, is also employed in maintenance in assisted living. For those considering going back to school and applying for a Foundation Scholarship, David says, "Going back to school is always nerve-wracking and you may doubt yourself, but, once you're in, it's actually quite easy, and you get comfortable. Education is always a benefit."

In 2023-24, the UMRC-Porter Hills Foundation awarded Scholarships of up to \$3,000 each to **24** Brio team members, across the organization, totaling **\$56,284!**

Since the program began in 2014, **150** team members have received more than **\$621,000** in Scholarships.





...and Emergency Aid

Brenda Parks: 'I'm just so grateful.'





renda Parks, Scheduling
Coordinator for Kresge Healthcare
and Rehabilitation Center at Chelsea
Retirement Community (CRC), has worked
in various roles at Brio Living Services since
2015, including CRC and Thome PACE in
Jackson. She says she loves scheduling: "It's
like a big puzzle. I love interacting with all
the team members and hearing their stories."

However, Brenda shares, "2024 wasn't the nicest to my family." Her husband suffered a knee injury which required emergency surgery and time away from work, creating a financial burden for their family. Needed car repairs and helping their adult children with a new baby also strained their finances. When their furnace went out in December, it was the last straw. The circuit board could no longer be replaced, requiring them to purchase a new furnace.

"It was the first time I had to call in during my time as a scheduler," says Brenda. "My supervisor suggested the Foundation's Emergency Aid Fund. My request was approved that same day. The check was sent directly to the company for my furnace—I didn't have to worry about anything."

Part of the UMRC-Porter Hills Foundation's Team Member Support Services Fund, Emergency Aid is available for Brio team members who experience an unplanned emergency causing financial hardship. Requests may be up to \$1,000 for eligible team members. Emergency Aid is paid directly to the vendor.

"It took a huge stress and a huge burden off of us," says Brenda. "Our furnace breaking down was not expected by any means. I'm just so grateful for the people who donate to this fund. Their caring hearts and willingness to help others in times of need is greatly appreciated."

In 2023-24, **40** team members, across the Brio organization, received Emergency Aid totaling **\$34,786**!

In the past ten years since the program began, **200** team members have received Emergency Aid totaling more than **\$186,000**.

Thank You, Sponsors!





Thank you to all who took part in the UMRC-Porter Hills Foundation's *Giving Gratitude* events held in Ann Arbor on October 3 and Grand Rapids on October 17. We are grateful to each of you—our many friends, donors, team members, and sponsors—who helped make our events so successful. Your generosity and

compassion create opportunities to live life with joy and purpose at any age!

We were delighted to welcome more than 200 attendees statewide and to celebrate all you do to support vibrant living for older adults through our **Benevolent Care Fund**. Together, we raised over \$138,000, split evenly between our Benevolent Care Funds on the east and west.

We are especially grateful for our Sponsors who made these events possible!



Thankful Giver





















Joyful Giver

Allied Electric, Inc.
Chelsea Hospital
Chelsea Lumber Co.
Emmanuel Hospice
Grand Wealth Management
Meijer, Inc.

NPF Investment Advisors
Plante Moran
Print-Tech
The Architectural Group Inc.

Williams Kitchen & Bath Ziegler

Caring Giver

Anonymous (2)
Chelsea State Bank
Complete Refrigeration
Mr. Bill's Land Tree Snow LLC

Strengthening Communities

Huntington – Presenting Sponsor

he UMRC-Porter Hills Foundation is grateful for this year's Giving Gratitude Presenting Sponsor, Huntington Bank, a long-time partner of the Foundation and Brio Living Services.



"This partnership represents a shared commitment to addressing critical community needs," says Lauren Davis. Huntington Bank's Regional President in West Michigan. "As a financial

institution, we recognize the economic and social challenges faced by older adults, and we are passionate about working with organizations like Brio to create solutions that empower individuals to live independently and with dignity.

"Supporting the *Giving Gratitude* events aligns perfectly with our mission to strengthen communities by uplifting organizations that prioritize care, connection, and quality of life," Lauren adds. "By sponsoring this initiative, we have the opportunity to show gratitude for those who dedicate their lives to serving others, especially older adults, and to contribute to their well-being in a meaningful way."

In addition, the Huntington Bank Foundation provided a grant for the UMRC-Porter Hills Foundation's *Tree of Life* initiative, supporting Benevolent Care. "This grant reflects our dedication to addressing the unique needs of older adults and helps ensure that residents in Brio's west-side communities can continue to receive care and support, even if they outlive their resources," explains Lauren. This year's *Tree of Life* gifts on the west exceeded the \$10,000 matching goal, raising a total of more than \$17,000!

Huntington Bank also offers financial education to residents of Brio's Affordable Living communities in Kent County. "We're thrilled that this is part of our ongoing efforts to empower individuals with tools to manage their finances effectively," says Lauren. "These initiatives are particularly meaningful because they provide tangible, lasting solutions."

Lauren adds, "We strive to build lasting relationships with organizations like UMRC-Porter Hills Foundation and Brio Living Services. Their missions resonate deeply with Huntington Bank's core values and are an inspiring reminder of the importance of community-centered solutions, a cornerstone of Huntington's approach to partnerships. We are grateful for the opportunity to work alongside Brio and the Foundation and look forward to continuing this impactful partnership in the years to come."

Express Yourself

New Technology Gives Brio Resident Back Her Voice

olleen C., a resident at Brio Living Services' GREEN HOUSE® Homes in Grand Rapids, has a blanket printed with her wedding picture. Her family gave it to her after her husband passed away. "My niece and nephew thought it would make me smile," Colleen is able to say through a new device that helps her communicate with others.

"Colleen has MS and her speech has become so impaired, she is difficult to understand," says Allison Kampmueller, a speech pathologist for **Porter Hills Home Health Care** who has been working with Colleen since 2022. Allison was able to get Colleen approved for a 30-day trial of a Tobii Dynavox communications system.

"It's basically an iPad with several apps and programs Colleen can use to communicate," explains Allison. "She can type what she wants to say, and it can be personalized with information about her family and her common requests/phrases so she doesn't have to type them over and over."

The trial period is intended to make sure it's a good fit for her although, in just her first week with the device, Colleen was already getting the hang of it. The iPad is lightweight, portable, and can be attached to her motorized wheelchair. In addition to communicating, Colleen can use her iPad for FaceTime and texting, playing games, and watching movies. "I should not have had



Allison Kampmueller and Colleen C.

my family buy me an iPhone," Colleen says. "This can do all of that."

Before, Colleen would receive a lot of nodding and smiling from others who couldn't understand what she said, according to Allison. The new iPad is changing that.

Says Traci Potter, Director of Clinical Services at the Green House Homes, "Colleen is still 'there.' She has a lot to say and has a great sense of humor. Now she can express herself, and our team can know her better and know what she wants."

Read more of Colleen's story at MyBrio.org/Blog.

The Pines Residents Rich and Bonnie Dennes Share Missionary Experience in Japan

n 1997, missionaries from Okutama Bible Chalet in Japan visited Rich and Bonnie Dennes' church in Ypsilanti. "Okutama offered summer camps for Japanese children," explains Bonnie. "Since Rich and I first met at a Methodist church camp, we were intrigued."

Rich and Bonnie had the opportunity to go to Japan to visit Okutama for two weeks. The next year, they raised enough money to go back, this time staying for ten years as missionaries.

"We weren't pastors, we don't have degrees, and we didn't speak Japanese," says Bonnie. "Still, we felt called to be there, and we could see God in every step."

This was especially true when, just six months into their stay, Rich required double bypass surgery. "Rich received care in the number one hospital from the cardiologist who cared for Japan's prime minister."

During their decade in Japan, Rich and Bonnie also served at the Christian Academy of Japan and SEND International. "Rich worked in maintenance at Okutama, then was Director of Development at the Christian Academy of Japan, and taught English as a second language," Bonnie shares. "Because Rich didn't speak Japanese, Rich's sermons were translated by Japanese instructors who taught English."

Bonnie also taught English as a second language to local people in their homes. "They were so happy to show me the Japanese way to do things, and we became friends." At SEND International, Bonnie worked as the president's administrative assistant. Rich and Bonnie also led a puppet ministry, teaching elementary students to perform with puppets in local Japanese neighborhoods.

"God opened so many doors for us," says Bonnie. "The head pastor there said we were true missionaries—we came to Japan because God told us to. I hope we made a difference in some lives."

Rich and Bonnie returned to the U.S. in 2008. Bonnie later became the Executive Assistant at United Methodist Retirement Communities for then President and CEO John Thorhauer. The couple retired to Florida, but returned to Michigan in 2023 to move to Brio's The Pines Senior **Apartments** in Chelsea. 10

Brio Living Services and UMRC-Porter Hills Foundation Highlights – July 1, 2023 through June 30, 2024



RELAUNCHING AVENUES PROGRAM

In 2024, Brio Living Services announced the re-launch of **Avenues by Brio Living Services**. A life plan community at home program for adults 55 and up, Avenues focuses on health and wellness and provides navigation services for its members to remain living independently in their own home.

"At Brio, we want to offer services where older adults wish to receive them—whether in one of our beautiful residential communities, or in the comfort of their own homes," says Luke Reynolds, Brio's Chief of Home & Community Based Services.

"Avenues offers an option for those who choose to stay in their home."





PACE Director of Finance Jackie Dukes, Executive Director Sonja Love Felton, and Medical Director Dr. Marjorie Almeda



CELEBRATING 10 YEARS OF HURON VALLEY PACE

Huron Valley PACE (Program of All-inclusive Care for the Elderly) celebrated its tenth anniversary with A Decade of Dedication Open House event at the PACE Day Center in Ypsilanti on March 8, 2024. Teresa Spencer, family member of a PACE participant, shared her experience. "Huron Valley PACE is so wonderful, and I especially appreciate the food pantry and the chance for respite that PACE provides me. I preach PACE wherever I go."



BEST AND BRIGHTEST COMPANIES - WEST MICHIGAN AND NATION

Brio Living Services was honored again in 2024 as a Best and Brightest Company to Work For® in West Michigan for 22 years running. Brio also earned a spot on the list of Best and Brightest Companies to Work For® in the Nation for the second year. Brio Living Services President & CEO Steve Fetyko says, "These awards are incredibly meaningful and recognize the thousands of incredible ways our team members bring our mission to life each and every day and the positive difference they make in the lives of the people we serve."





BREAKING GROUND FOR NEW INDEPENDENT LIVING

In May 2024, Brio Living Services hosted a public groundbreaking to celebrate its new independent living addition, The Ravines, located at Porter Hills Village in Grand Rapids. Called "The Ravines" for its picturesque views of the nearby woodlands, these spacious apartments offer high quality amenities and finishes, as well as access to all the care, comforts, and conveniences available at Porter Hills Village. A total structure of nearly 50,000 square feet, The Ravines is expected to be completed by Summer 2025.





EXPANDING LIFECIRCLES PACE

LifeCircles PACE celebrated a
\$1 million wellness gym expansion at its
Day Health Center in Holland, Michigan.
This 6,620-square-foot addition includes
state-of-the-art physical and recreational
therapy spaces. "LifeCircles' innovative model
allows PACE to invest in care that helps people
maintain or improve their independence for the
long term," says Heidi Gras, Executive Director
of LifeCircles PACE. "Our newly enhanced
spaces help us focus on reducing fall risks and
unnecessary hospitalizations for our
PACE participants."



Heidi Gras, center, cuts ribbon with members of LifeCircles PACE Board of Directors and LifeCircles Medical Director, Dr. Iris Boettcher (right).



EAGLE—COMMITMENT TO EXCELLENCE

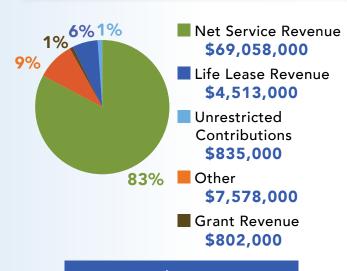
Brio Living Services earned EAGLE reaccreditation with commendation, the highest possible level, from the EAGLE Accreditation Commission of the Methodist Ministries Network. EAGLE, or Educational Assessment Guidelines Leading toward Excellence, is the only faith-based accrediting body in the world that focuses on ministries for older adults and children. Brio is one of just eight older adult ministries in the nation to achieve EAGLE accreditation and the only one in Michigan. Methodist Ministries Network President & CEO Mary Kemper stated, "We commend Brio's governing board and team for their commitment to excellence. We celebrate your success and extend our thanks for your commitment to EAGLE."



Fiscal Year Ending 2024 Financial Report

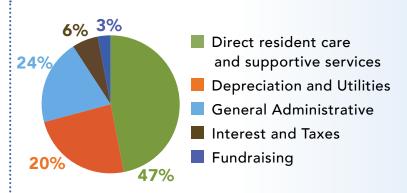
JULY 1, 2023 THROUGH JUNE 30, 2024

OBLIGATED GROUP* OPERATING REVENUE



TOTAL: \$82,786,000

OBLIGATED GROUP* OPERATING EXPENSES



Only **3%** in fundraising expenses!

UMRC-Porter Hills Foundation is committed to being a good steward of your gifts.

CAPITAL INVESTMENTS

Chelsea Retirement Community \$3,089,000

The Cedars of Dexter \$348,000

Huron Valley PACE **\$320,000**

Thome PACE **\$218,000**

TANDEM365 **\$43,000** Porter Hills Village **\$6,308,000**

Cook Valley Estates \$1,775,000

Meadowlark Retirement Village \$700,000

LifeCircles PACE \$579,000

Affordable Housing Communities \$346,000

Includes:

Bailey's Grove \$30,000
 Harvest Way \$39,000
 Oak Ridge \$70,000
 River Grove \$161,000
 Station Creek \$15,000
 Walker Meadow \$31,000

Brio Living Services made total Capital Investments of \$13,726,000 to improve the lives of older adults across Michigan.

As a nonprofit,
Brio Living Services
reinvests ALL margin
and philanthropic dollars
to uphold and expand
our mission.

^{*}Obligated Group is comprised of Brio Living Services and UMRC-Porter Hills Foundation.

\$9,871,000 Total Contributions UMRC-Porter Hills Foundation

THANK YOU for your gifts that support our initiatives of:

Benevolent Care
Team Member Support Services

Life Enrichment
Capital Improvements

OLDER ADULTS SERVED

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Feeling of Security

Avenues – Aging in Place in the Home You Love.

r. Bobbi Thornburg, a retired radiologist, recently became a member of Avenues by Brio Living Services. Avenues is a continuing care at home program that allows you to age in the home you love.



Katlin Mills and Bobbi Thornburg

Bobbi grew up in Nebraska, completed X-ray tech school in Colorado, then worked in Tucson while completing her undergraduate degree part-time. Bobbi decided to go to medical school and came to Michigan in 1990 for a radiology residency. She started her career at Butterworth Hospital in Grand Rapids.

In 2012, Bobbi and her partner

purchased their dream home in coastal California, but her partner became ill with lung cancer the following year. They were able to be married in their California home before her partner passed away. Bobbi retired from her career as a radiologist during the COVID pandemic.

At this point, Bobbi realized her friends and support system were in Michigan. Her parents in Nebraska had passed away, and her younger brother and his family live in Kansas. "What do you do when you don't have family close-by?" Bobbi says. "You never know—your life can change in an instant."

Bobbi decided to stay in Michigan in the home she remodeled, with Asian and vegetable gardens and her chickens. She learned about Avenues from friends of hers who are members. She made a call and joined Avenues in October.

"They do a thorough vetting process," says Bobbi about Avenues' executive director, Paige Hendrickson and team. "Paige met with me and told me about the program. Katlin Mills, Sales Advisor, is wonderful, very smart and compassionate. Jessica Lincolnhol was assigned as my Avenues navigator I can go to with questions. We really clicked."

For Bobbi, the best part of Avenues is the feeling of security it provides for her. "It has taken away a great deal of anxiety for me and worrying if I would need some kind of help in the future. Now, I have someone to call. It's really nice to have that—to know someone is there, and they're a good team."

A Key Role in Foundation's Mission



e are honored to feature Karen Owen, recently promoted to Senior Director of Foundation Operations. Karen first joined the Foundation in 2016, playing a key role in the Foundation's previous campaign and supporting the successful affiliation of

the UMRC Foundation and Porter Hills Foundation into one. Today, Karen's focus is on the strategic oversight and management of the Foundation's operational functions, ensuring efficient and effective administration of its programs and processes.

"While much of her work is behind the scenes, Karen's position is critical to our mission, our strategic objectives, and the Foundation's overall success," says Kelli Smith, Foundation President & CEO. "Karen embodies the greatest qualities of the UMRC-Porter Hills Foundation. She is an exceptional team member and integral to our ability to achieve our goals."

Plan Your Giving in the New Year!

id you know that about 30% of all charitable donations occur in December? While that month is significant for giving, contributions can be made year-round. With a Donor Advised Fund (DAF), you secure your tax deduction when you contribute to the fund, not when you direct a grant. Don't limit your generosity to December — make an impact any time!

Start the New Year with a conversation with your financial advisor and map out your

charitable giving in 2025. They can help you think about the charities that are important to you, like the UMRC-Porter Hills Foundation, consider your giving goals for the year, and provide you with guidance on long-term strategies.

Our UMRC-Porter Hills Foundation team is also available to answer any questions you may have. From all of us, we wish you a Happy 2025!

To learn more, visit Foundation.UMRCPH.org or contact 734.433.1000 ext. 7397 (east) | or | 616.577.2297 (west) Foundation.UMRCPH.org



LEGACY SOCIETY

We are honored to remember the following group of more than 400 treasured friends who have made—and continue to make—a difference in the lives of older adults by including the UMRC-Porter Hills Foundation in their estate plans. Their generous gifts, totaling over \$24 million, reflect their steadfast belief in our faith-filled mission of service to older adults. Though they are gone, their legacy lives on.

\$1 MILLION +

Mrs. Edith K. Brinkman Mrs. Flsie Flaishans James and Anne Ford Trust

\$100,000 - 999,999

Anonymous (3) Janet Alford Mildred Asselstine Eleanor and John A. Bott Dr. and Mrs. David C. Boyce Della Boyer Lena Brummel Mrs. Helen Carow Kay Christenson Marjorie and William James Connor Pat and Peter Cook Francis C. and Mary Ann Curtis Mrs. Beatrice Edwards Mr. Paul E. Egelkroud Mr. Stanley A. Evans Ruby I. and Harold W. Fassold Mr. Fred W. Ford and Mrs. Vesta Pauline (Ford) Hons Julia Freer Carl and Virginia Geis Mary V. Good Mildred A. Grams Mary D. and Floyd L. Haight Lena G. Harberts Helen Harrigan Alta and Gerald Henry Louise E. Herald

Robert and Evelyn Hext

Lemmie A. Jenkins

Mrs. Rose H. Kahn

Mrs. Maxine Lahti

Rev. James and Mrs. Viola Hilliard

Audrey Lang Evelyn McSweeney Hazel Mead Harris M. Mever Elizabeth C. Nace Mildred L. Nims Arnold and Marion Ott Ann and Calvin Owen Rev. John Parrish Mrs. Jean A. Parrott Cary and Marion Peabody Margaret E. Rink Audrey and James Sebastian Mr. Delbert Seybold Stella Shields Alice D. Stuck Alice C. Terry Herbert and Margaret Trapp Lois and William Triplett Angie Van Hoven Peter and Anne Van Wingen Dori and Herb Vander Mey Mrs. Bernita Vandervoort Patricia A. Weimeister Mrs. Ruth V. Williams

\$10,000 - 99,999

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James Young moved to The Thome Rivertown Affordable Assisted Living Neighborhood in Detroit with virtually no belongings. Executive Director Julia Szuper helped James get settled, including furniture provided by donations to the UMRC-Porter Hills Foundation. When Julia's father, a member of the American Legion Post 217 Honor Guard, heard James was a veteran, his group assisted with James' move. "It's the best thing that's happened to me in a lot of years," says James.



American Legion members assist with James' move to Rivertown.

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The vision of our Legacy Society members will make a significant impact on the older adults of tomorrow.

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We'd love to include you in our Legacy Society! If you have included the UMRC-Porter Hills Foundation in your estate plans, please let us know. If you're thinking about it, we can help. Contact the Foundation at 734.433.1000 ext. 7502 (east) or 616.577.2297 (west) to learn more.





A generous gift from the Hamlin Family Foundation is providing a music therapist for residents at Porter Hills Village and Green House® Homes! Kristen Kimball is passionate about working with older adults. Here she is leading an impromptu music session with some Memory Support residents! Said Maegan Garlock, Director of Lifestyle and Wellness at Porter Hills Village, "This was a spontaneous opportunity for residents to enjoy the beautiful day, and Kristen just happened to have her trusty guitar in hand. She guided them through an experience of music and community. We are so thankful for the support of the Foundation and the donor to offer this service to our residents!"



LifeCircles PACE participant Dorene P. loves PACE and is not shy about telling others. "Dorene is our super advocate," says Sarah Milanowski, Enrollment and Marketing Manager. "At PACE Day at the Capitol in Lansing, she shared with her State Representative how PACE has helped her reach new goals, live independently with complex health issues, reduce her pain, and build meaningful relationships."



Dorene talks to State Representative Slaugh at PACE Day at the Capitol.

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Sharon UMC*

Thank you for partnering with the UMRC-Porter Hills Foundation to serve older adults with a gift from July 1, 2023 through June 30, 2024.

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We first met Edna at 92 when she moved to independent living at one of our Brio communities. Growing up as one of eleven children in a farm family near Alpena, she led a fulfilling life as a wife and mother. Edna enjoyed ballroom dancing with her husband, walking, and staying active.

Edna thrived in independent living, but at the age of 103 moved to get a little more care in assisted living, before eventually needing memory support. Her family worried that her finances were quickly running out.

That's when the beauty of Benevolent Care came into play.

Edna was able to get the care she needed. Your gifts to Benevolent Care make this a reality for residents like Edna and so many others. You are the hero in her story. "I want you to know the incredible care and love my mom and family received, and the deep peace of mind the Benevolent Care program offered us."—Edna's son, Jim





Chef Spencer Grab of Porter Hills Village recently took 2nd place at the 10th Annual Chef's Specialty recipe contest, sponsored by Meals on Wheels Western Michigan. With competition from many popular Grand Rapids restaurants, Spencer's cabbage and noodles with kielbasa, or *haluski*, was a crowd-pleaser. Thank you for showcasing the quality and dedication that make Brio's dining experiences so exceptional!



UMRC-PORTER HILLS FOUNDATION DONORS

We are grateful to each of our friends who have supported the older adults we serve through their gifts to the UMRC-Porter Hills Foundation from July 1, 2023 through June 30, 2024.

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2024 **Grow Bolder** conference panel hosted at Cook Valley Estates.



Brio's **Cook Valley Estates** hosted a pre-conference event for the Center of Innovation's 2024 *Grow Bolder* conference in Grand Rapids. Bringing together Green House® Project and Pioneer Network members, the event included a presentation by Brio's Chief of Residential Services Nicole Maag, tours of Brio's Green House® Homes and Cook Valley Estates, and a panel discussion with members of the Green House® Homes care team.

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Jay Wisentaner's beloved Aunt CeCe lived at Porter Hills Village for more than eight years before passing away in December. To honor her caregivers, Jay made a generous gift to the Foundation's *Tree of Life* initiative, supporting Benevolent Care on the west. This former board member says, "CeCe made many wonderful friends among the Cedar Court team members. I am grateful to honor those who so diligently and lovingly cared for her."



Three honored Porter Hills Village team members pose by the Tree of Life.

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WORDS OF GRATITUDE

Following a collision with a deer, Celeste Rodriguez, R.N.,
Infection Preventionist Nurse, applied for and received
Emergency Aid from the UMRC-Porter Hills Foundation.
Celeste writes: "I am truly grateful for the Foundation's
support. Thank you again for your thoughtfulness, and I look
forward to continuing my career with an organization that
consistently goes above and beyond for its team members."



Suzanne Waterbury and Deb Erke gear up for Walk to End Alzheimer's.

BRIO LIVING SERVICES TEAM MEMBER HONOR ROLL

We are grateful for the dedicated, compassionate team members of Brio Living Services who make a difference in the lives of older adults each day. A special thank you to those who made a gift to the UMRC-Porter Hills Foundation from July 1, 2023 through June 30, 2024.

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To err is human; to forgive, divine.

Every effort has been made to ensure the information contained in this Annual Report is as accurate and complete as possible. In the event of an error or omission, please accept our apology and contact the UMRC-Porter Hills Foundation office at 734.433.1000 ext. 7502 (east) or 616.577.2297 (west) so that we may update our records. Thank you very much.

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