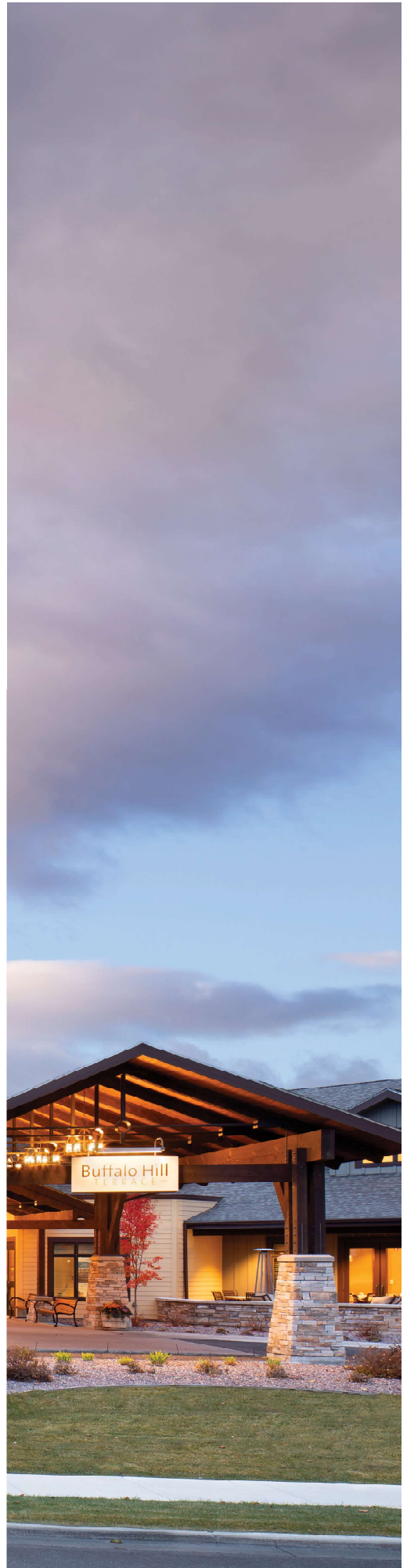


# 2019

## ANNUAL REPORT

### IMMANUEL LUTHERAN COMMUNITIES





# THE IMMANUEL SPIRIT

To do my part in providing stellar service I promise to...

Embrace and value our differences, while assuming positive intentions.

Treat everyone with courteous respect.

Greet everyone warmly, by name, and with a smile.

Strive to anticipate others' needs and act accordingly.

Treat everyone with importance.

Hold myself and my colleagues accountable.

Listen and respond positively in a timely manner.

Put the well-being of our residents, guests, and fellow team members ahead of my own.

Maintain high levels of professionalism, in both conduct and appearance, at all times.

Respond to every problem I see.

Pay attention to details.

Ask, "Is there anything else I can do for you?"

Contribute to an atmosphere of positivity, teamwork, and mutual support.

Focus on living a balanced life- body, mind, and spirit.

Lead by example.



## **BUSINESS PARTNER OF THE YEAR**

SWANK ENTERPRISES in Kalispell has been named Business Partner of the Year because of their dedication to the mission and ministry of Immanuel Lutheran Communities. Without their sincere efforts, responsiveness, and smart calculations, our community wouldn't be able to enjoy the many beautiful spaces our campus has to offer.

Although there are many aspects of their service that could be highlighted, we are most grateful for the level of service and excellence that they provided to our community. Their desire to align with our vision throughout recent assignments truly brought a deeper purpose and meaning to the project, and it is a pleasure to see our campus as it is today and witness our residents and guests enjoying the fruits of this project, thanks to the help of Swank Enterprises.

## **MISSION IN MINISTRY PARTNER OF THE YEAR**

Immanuel Lutheran Communities recognizes DIANA KEAGY as our Mission in Ministry Partner of the Year. Immanuel Lutheran is blessed with a long list of volunteers that continually stick with us. We know they are a huge value to us, with their commitment, generosity, and honest love of the residents and staff.

This acknowledgement of all our terrific volunteers leads us to one of our treasures, Diana Keagy. Diana has a heart full of love for others and no desire for recognition or adulation. Serving our residents is her hearts' desire.

Our team counts on Diana, and she always finds the time in her busy life to meet so many of our needs, always with the comment, "I just love to be here." She is committed to our ministry, and we are a better place to live and work because of her spirit.





# RAISING THE STANDARDS RISING TO MEET THE NEED

Immanuel Lutheran Communities has been meeting a need for seniors in Kalispell, Montana since 1957. Over the past 60+ years, we have grown from a single nursing home, to a 13.5-acre Life Plan Community, with a campus occupying over 280,000 square feet, offering a variety of services such as Independent Living, Assisted Living, Rehabilitation Services, Skilled Nursing Care, and much more!





# WE ASK WE LISTEN WE SERVE

Dear Friends and Neighbors,

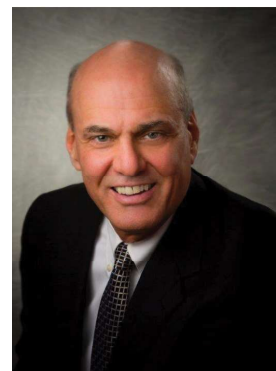
We have been inspired by the overwhelming number of people who helped in positioning us this year to meet the needs of others. There is no better feeling than a life dedicated to helping others. The purpose of this year's annual report is to showcase our progress through our development, while highlighting that we could not do it without the generosity and support of YOU. Thank you for helping us live out His command to shelter and care for those in need.

Our board members willingly share their gifts and talents to expand the great work of our organization, and we recognize many special and meaningful contributions that are of lasting value to our Foundation and community.

Thank you to our donors, friends, supporters, board members, and staff for your faith in action, and for illuminating the impact of our work.

May God bless you and walk with you,

*Sam*      *Tom*



**Tom Lund**  
Board President



**Jason R. Cronk**  
Chief Executive Officer



# FINANCIAL SUMMARY

## TOTAL REVENUE & EXPENSES FISCAL YEAR 2019

### REVENUE

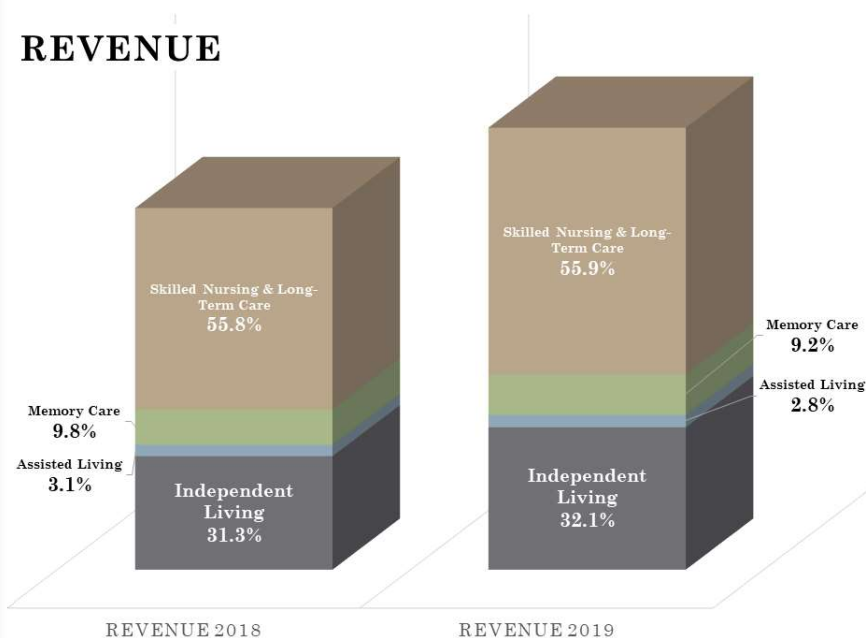
Health Services Revenue, Net	\$10,614,222
Resident Services Revenue	\$8,368,468
Other Revenue	\$1,380,130
<b>TOTAL OPERATING REVENUE</b>	<b>\$20,362,820</b>

### EXPENSES

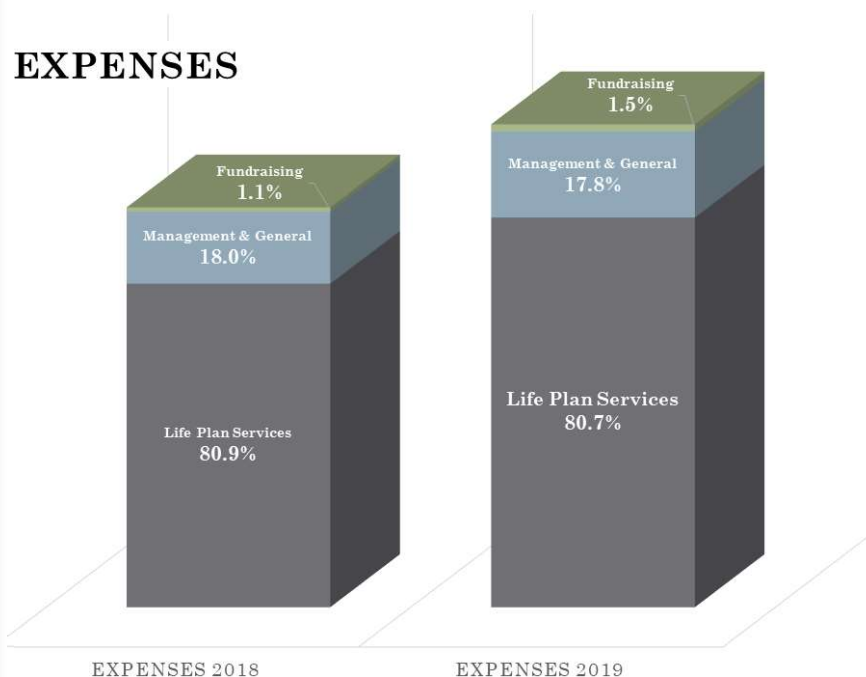
Salaries and Benefits	\$12,171,695
Supplies	\$2,059,153
Contract Services	\$1,074,129
Repairs and Maintenance	\$257,113
Occupancy	\$493,197
Depreciation	\$2,687,118
Interest	\$2,700,095
Insurance	\$285,345
Advertising	\$670,582
Other	\$1,420,888
Provision for Bad Debts	\$316,095
<b>TOTAL OPERATING EXPENSES</b>	<b>\$24,135,410</b>

Annual Debt Service Coverage Ratio	1.44
Minimum Debt Service Coverage	1.20
Days Cash on Hand	244
Minimum Days Cash on Hand	150

### REVENUE

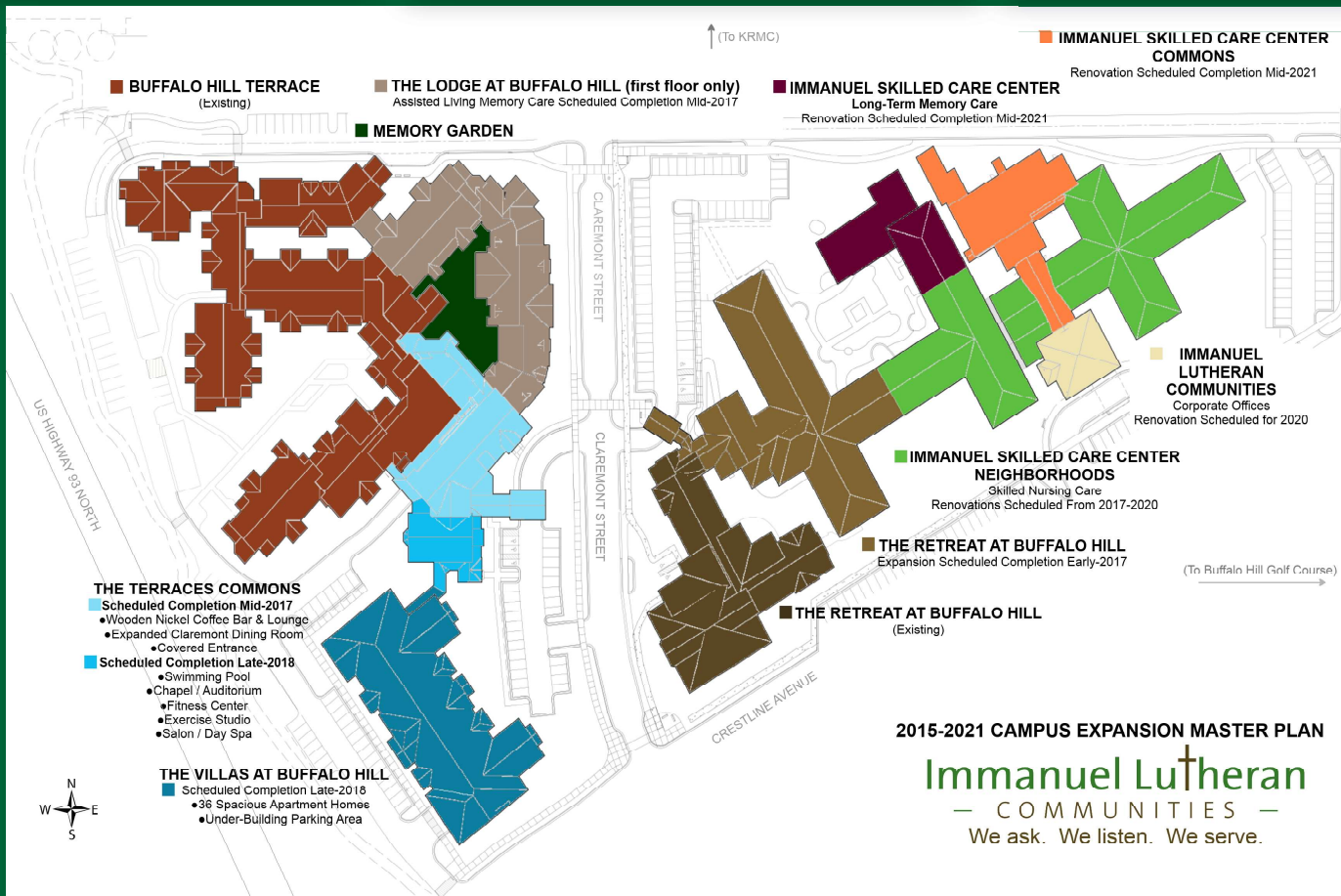


### EXPENSES



Immanuel Lutheran Communities undertakes an annual financial examination performed by an independent auditor engaged by the board of directors. The financial information compiled here is based upon the most recent audited financial reports. For more information, please contact Teryn Waldenberg, Chief Financial Officer, at 406-300-4922 or [twaldenberg@ilcorp.org](mailto:twaldenberg@ilcorp.org).





# Immanuel Lutheran Communities CAMPUS DEVELOPMENT PROJECT

Immanuel Lutheran Communities is always in the market for new challenges. Beginning in 2016, we broke ground on our most ambitious construction project to date: a seven-year campus expansion and remodeling master plan. Now entering into Phase 4 of this project, we have nearly tripled the capacity of the Retreat, our short-stay rehabilitation neighborhood, opened a new memory support community, increased our independent living capacity by over 30%, and are currently in the process of bringing our Skilled Care Center up to date.

Because our industry is ever-changing, we don't anticipate any rest in the coming years. The need for independent and assisted living and skilled nursing care is constantly growing and changing, so we are already forecasting for the future, to see what our next project to meet the needs of our aging community should be.

In the past year alone, we have accomplished multiple grand openings and celebrated the success of many projects to improve the lives of our residents and guests. For more information about how you can help, contact Dave Jolly, Director of Facilities and Operations, at 406-890-8005 or [djolly@ilcorp.org](mailto:djolly@ilcorp.org).









# Immanuel FOUNDATION

## **ABOUT US**

The Immanuel Foundation, a 501(c)3 nonprofit organization, was founded in 2018 to raise funds to serve the needs of seniors in Montana through Immanuel Lutheran Communities in Kalispell. Opened in 1957 as the Immanuel Lutheran Home, the community was founded as a ministry of area Lutheran congregations. It embraces residents, staff, and partners from all faith backgrounds, while maintaining an active relationship with its founding denomination. Being rooted in a faith tradition means that Immanuel sees its work as ministry. It views all Montana seniors as equally deserving of safe, secure homes in vibrant communities. The Foundation is cultivating a community of philanthropy and raising charitable support for Montana's seniors and those who care for them.

## **OUR MISSION**

The mission of Immanuel Foundation is to cultivate and secure charitable gifts so that Immanuel Lutheran Communities can provide safe homes in vibrant communities for Montana's seniors in need.

## **IMMANUEL FOUNDATION BOARD**

Jason Cronk, ILC CEO, Ex Officio  
Jim Heim, ILC Board Liaison  
Kelly Rieke, President  
Gini Ogle, Vice President  
Teryn Waldenberg, ILC CFO, Treasurer  
Laura White, Secretary  
Stan Pine  
Margie Simpson  
Debbie Snyder  
Joe Unterreiner  
Candy VanFrachen

## **IMMANUEL FOUNDATION STAFF**

Heidi Hicketier, MBA, Foundation Director  
Lauren Davis, PhD, Communications and Office Manager

## **RESIDENT ADVISORY COMMITTEE**

Susanne Beck  
B. J. Carlson  
Barbara Gould  
Mark Norley  
Shelby Thompson

*a year's review*

# DEAR FRIENDS,

It has been quite a year of change and transition in the Immanuel Foundation. Both of us are new leaders in this young organization, and we are excited about the future! 2019 was the first full fiscal year of the Immanuel Foundation. We have already launched a program to support low-income families in need of daytime dementia care, installed a new stained-glass window in the new auditorium/chapel, and secured over \$52,000 to purchase a new ADA-accessible medical van to transport Immanuel residents to and from over 2,000 medical appointments each year.

As we look to the future, we are aware that seniors in the Flathead Valley have significant needs. Immanuel is already here for those who need a safe, comfortable, engaging place to live. Through donations to the Foundation, generous individuals like you help extend these services to seniors at all income levels.

Donations to the Foundation also support the hardworking employees who help make Immanuel such a wonderful place for seniors to live.

Gifts to the Employee Development fund and the Employee Christ Care fund have helped individuals further their education and provided emergency support in times of crisis.

Of course, nothing the Foundation does would be possible without you, our supporters. Your gifts help area seniors and Immanuel employees every day. Thank you so much for your generosity and your caring spirit. As we go forward into the future, we are eager to work with you to help Immanuel Lutheran Communities continue to serve seniors at all income levels.

Sincerely,

*Heidi*



Heidi Hickethier  
Foundation Director

*Kelly*



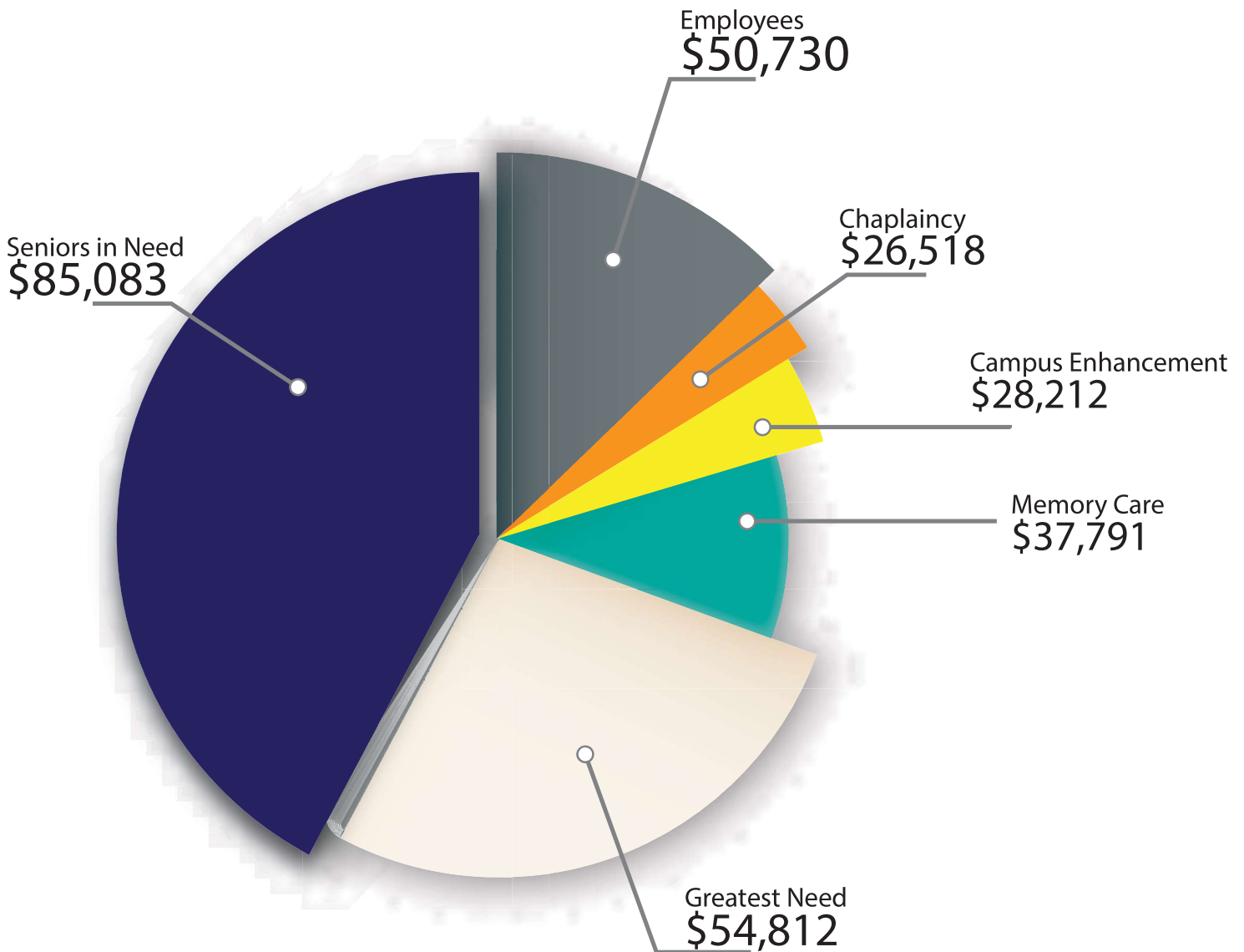
Kelly Rieke  
Board President



# FINANCIAL SNAPSHOT

**\$283,146**  
**FUNDS RAISED IN**  
**FISCAL YEAR 2019**

The administrative overhead and costs for the Immanuel Foundation are funded by Immanuel Lutheran Communities. 100% of funds raised by the Immanuel Foundation directly benefit needs within our community.



# PHILANTHROPY LEADER OF THE YEAR

The Immanuel Foundation and Immanuel Lutheran Communities are delighted to name Ivan O'Neil Philanthropist Leader of the Year for 2019. Ivan is a lifelong Flathead Valley resident who has been connected to Immanuel Lutheran Communities from the organization's earliest days, when his father-in-law, Peter Fosland, was on the Board of Directors.

Ivan himself first came onto the Immanuel board in the 1970's. In the first of his two terms, Ivan helped lead the organization in its pioneering decision to open one of the first specialized dementia units in the United States. In fact, it was Ivan's idea to name the new dementia wing after Dr. E.O. Bratsberg because Dr. Bratsberg, who originally had the idea for the Lutheran Home, saw a need and figured out how to meet it. Similarly, the board during Ivan's first tenure saw a need for dementia care in the Valley and set to work to see how Immanuel could make it happen.

When Immanuel was ready to take another big, innovative step - opening Buffalo Hill Terrace - Ivan was once again ready to step up and assist. As the board went through the process of deciding whether to build independent senior living apartments, Ivan offered to help in any way he could. At first, he volunteered to handle the financials, but the organization found him to be so valuable that he was invited to serve on the board again. Ivan accepted the request and rose to the challenge of leading the organization through this critical time. In the famously close 5-4 decision, he voted in favor of building the Terrace. In total, Ivan served on the Immanuel board for 13 years.

In addition to the board leadership, Ivan has always been involved in fundraising for the organization. He has designated Immanuel as a beneficiary of more than one charitable gift annuity, and he also shares information with others about this mutually beneficial method of giving. And when the organization has a specific need, Ivan is always ready to listen and often ready to give. Just this year, he made a significant contribution toward the much needed new ADA-accessible medical van. That's why Ivan is this year's Philanthropy Leader of the Year!





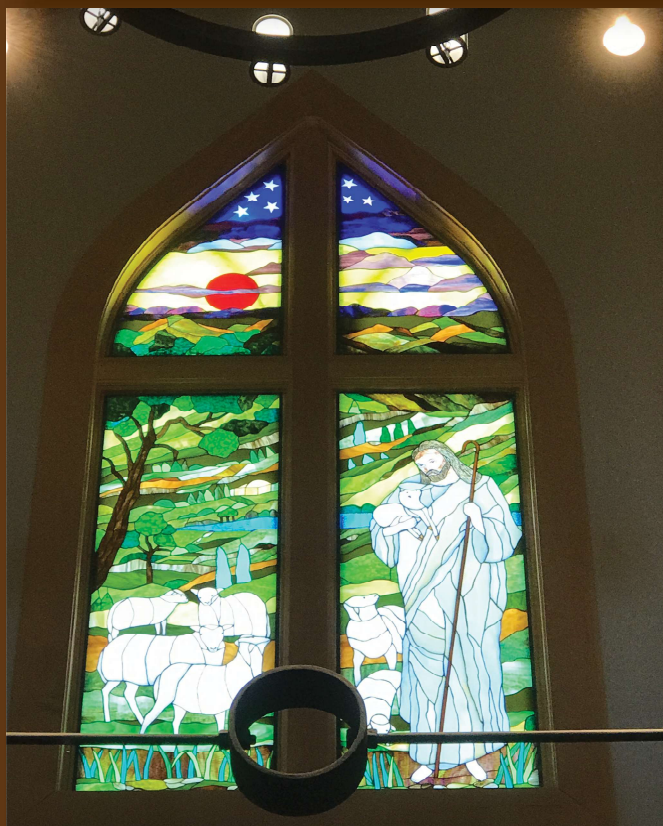
# IMMANUEL FOUNDATION IN THE COMMUNITY



Thanks to support from around the Flathead Valley, the Immanuel Foundation Estate sale raised \$23,000 to extend Immanuel Lutheran Communities' Lodge Day Services program to seniors in need. This program provides respite services to family caregivers, allowing them time to run errands or rest. At the same time, it offers seniors with dementia opportunities for socialization and recreation. The fee for these services is not always in the budget for seniors on fixed incomes. Along with other philanthropic funds, proceeds from the Immanuel Foundation Estate Sale make this program accessible to Flathead Valley families at all income levels.



Members of the Flathead Valley business community sponsored Immanuel Lutheran Communities' Summer Concert Series and provided \$7,000 for our Greatest Needs. These funds support all aspects of Immanuel Lutheran Communities' programs, services, and campus needs. In 2019, our greatest need was a new ADA-accessible medical van needed for over 2,000 resident medical trips made by Immanuel's transportation department each year. Corporate Sponsorships from the Summer Concert Series helped to purchase this van and other equipment for Immanuel's residents.



Residents of Buffalo Hill Terrace and the Villas rallied around the cause of a Stained Glass Window for the new chapel/auditorium at the Terrace. The residents joined together to raise \$15,000 for a beautiful image of Jesus as the Good Shepherd that adds a lovely splash of color to the worship space.

Immanuel Lutheran Communities' member churches continued to give toward the Chaplaincy Fund. Immanuel Lutheran Communities is the only retirement community in the area with a full-time pastor, and the Chaplaincy fund helps ensure that residents, staff, and families can continue to experience weekly worship services, hospital visitations, Bible studies, and other pastoral care.

# For their generous philanthropic contributions in Fiscal Year 2019, Immanuel Lutheran Communities and the Immaunel Foundation would like to thank:

## Gifts of \$250-\$499

Shirley & Bob Anderson  
John & MB Bertram  
Diana Blankenship  
Christina Brown  
Budget Blinds of the Flathead  
Danielle Coffmann  
D.A. Davidson & Co.  
Virginia Doerschlag  
Barbara Gould  
Greenery Park Dentistry  
Frances Hawks  
James & Linda Heim  
J2 Business Products  
Dean & Joan Jellison  
Louise & Roy Jimmerson  
Ken & Rhonda Kalvig  
Rebecca Kovarik  
June Leverson  
Mary Jo & Robert Look  
Frank Lundquist  
Mirza Hearing Services, LLC  
Montana Hospital Association  
Barbara Nowaczyk  
Fay Pemble  
Maxine Pistorese  
Pastor Peter Ramseth  
Retractable Screens  
Beverly & Samuel Reynolds  
James Robischon  
Florence Schmautz  
Glenna Small  
Blain & Laurie Steller  
Naomi Streich  
Eleanor Weidman  
Ken White, Properties Northwest  
Whitefish Credit Union  
Marceline Yates  
Sandra Magnan & Robert Wagnild

## Gifts of \$500-\$999

Amore Salon & Spa  
BC Ziegler & Company  
Susanne & Bill Beck  
Suzanne Booker  
Joshua Brown  
Roger & Deane Claridge  
John Cowan  
Dorothy Donahoe

Flathead Electric Cooperative, Inc.  
Alice Ford  
Helen & Charles Gerry  
Laura & Russ Gregory  
Douglas & Catherine Hetrick  
Dr. Larry & Teri Iwersen  
Thelma Johnson  
Kalispell Regional Healthcare  
Martha & David Maurer  
Kelly & Robert Morrow  
Dr. Doug & Barb Nelson  
Janie & Stuart Nicholson  
Gini & Randy Ogle  
Lorraine Ondov  
Margaret Pack  
PayneWest Insurance  
Debbie Snyder  
Jim & Lisa Stack  
Carol Stewart  
Betty Stoick  
Swank Enterprises  
Linda Tabatt  
Shelby & Fred Thompson  
Thrivent Financial  
Marjorie Tuma

## Gifts of \$1,000-\$9,999

Margaret & Bill Baird  
BNSF Railway Foundation  
B.J. & Milt Carlson  
Central Heating, Cooling, Plumbing & Electrical  
Jeanine & Clyde Pederson  
Linda & Doug Conners  
Jason Cronk  
Crowley Fleck PLLP  
Glacier Bankcorp, Inc.  
Priscilla Gunter  
Bruce Harris  
Janice & Neil Hart  
Hospice Care Foundation of Missoula  
Diane & Jim Jenks  
Marilyn Knutson  
Kalispell Foot & Ankle Clinic  
Sallie & Pete Larson  
Mrs. Wm. I. Maclachlan  
MacArthur, Means & Wells Architecture  
Kathryn Mercord  
Cathy & Dave Meredith

Florence Natelson  
Polly Nikolaisen  
Marilyn Reynolds  
Carolyn Rhodes  
Laura Reynolds & Walter Rowntree  
Marlene Rutherford  
Bernadine Sather  
Sawgrass Partners  
Susan & Bill Schottelkorb  
Marvin Schultz  
Margie & Larry Simpson  
Pastor Larry & Charmaine Stappler  
Joyce Street  
George Thompson  
Harold Tutvedt  
William & Blanche Hetzel Foundation  
Carla & Ron Wilton  
Helen Working

## Gifts over \$10,000

Dick Irvin  
Ken Larson  
Margaret Mohl  
Ivan O'Neil  
Charles & Lottie Stewart

## In Kind Donations (\$500+)

Gelena Akimova-Lystne  
Backslope Brewing  
Estate of John Cowan  
Myrna Culham-Fish  
Ann & Dan Fagre  
Flathead Industries  
Charlotte & Wilson Higgs  
Estate of Royce Mikelson  
Polly Nikolaisen  
Judy & Lyle Phillips  
Stan Pine  
Peter Ramseth  
Laura Reynolds & Walter Rowntree  
Marlene Rutherford  
Shelby & Fred Thompson  
Mark Norley & James Udick  
United Way of Northwest Montana  
Gerry Wachholz  
Marceline Yates



# DONATIONS TO THE IMMANUEL FOUNDATION WERE MADE IN LOVING MEMORY OF:

Robert Ace, Karen Alma, John Benningfield, Jenny Bornman, Delsie Brooks, Ted Burton, Steven Cameron, Linda Coy, Virgie Dawson, Bill Donahoe, Olda Dotson, Orma Fairbank, Billie Gossett, Russell Gregory, Bruce Harris, Janice Hart, Margaret Hart, Neil Hart, Helge Helgeson, Harold Herbig, Regine Hoag, Elsie Jimmerson, Thelma Johnson, Judith Jones, Margaret Keith, Elizabeth LaCroix, Richard Lorenz, Brenton Mays, George McFarland, William Meyers, Royce Mikelson, Delno (Del) Moore, Diane Moussiaux, Florence Natelson, Dennis Nielsen, Florence Noble, Rita Otten, Gordon Payne, Janice Peterson, Rose Pfosch, Alda Pierce, Hans Polte, Lila Pritchard, Beverly Reynolds, Marilyn Reynolds, Mary Riddle, Mary Sachkowsky, Marvin Schultz, Alda Smithson, Ruth Soderstrom, Vern Stewart, Milena Stoddard, Joyce Street, Naomi Streich, Joyce Taylor, Harold Tutvedt, Luella "Juanita" Uhde, Luther Wachholz, Geraldine Whitehead, Jacqueline Wildgen

## Current Church Partners:

All Saints Lutheran (Clancy)  
Atonement Lutheran (Missoula)  
Bethany Lutheran (Dutton)  
Bethel Lutheran (Great Falls)  
Bethlehem Lutheran (Kalispell)\*  
Christ Lutheran (Libby)\*  
Eidsvold Lutheran (Somers)\*  
Faith Lutheran (Hamilton)  
Faith Lutheran (Ronan)  
First Lutheran (Plains)\*  
First English Lutheran (Great Falls)  
Galata Lutheran  
Gloria Dei Lutheran (Butte)

Gold Hill Evangelical Lutheran (Butte)  
Good Shepherd Lutheran (Polson)\*  
Hope Lutheran (Anaconda)  
Immanuel Lutheran (Missoula)  
Jocko Valley Lutheran (Arlee)  
Lutheran Church of Sunburst  
New Life Lutheran (Helena)  
Northridge Lutheran (Kalispell)\*  
Our Redeemer Lutheran (Helena)  
Our Savior's Lutheran (Bonner)  
Our Savior's Lutheran (Great Falls)  
Our Savior's Lutheran (Thompson Falls)  
Redeemer Lutheran (Great Falls)

Shepherd of the Valley Lutheran (Townsend)  
St. John Lutheran (Great Falls)  
St. John's Lutheran (Helena)  
St. Luke's Lutheran (Shelby)  
St. Paul Lutheran (Missoula)  
St. Paul Lutheran (Cut Bank)\*  
St. Paul Lutheran (Fairfield)  
Trinity Lutheran (Choteau)  
Trinity Lutheran (Hot Springs)  
Valley of Christ Lutheran (Frenchtown)

*\*churches who financially support Immanuel Lutheran Communities' Chaplaincy Program.*



Dear Friends,

Over the past year, Immanuel Lutheran Communities has continued to be a place where all peoples' beliefs are respected and where your Pastoral Care Team tries to embody God's love and grace to all. The team consists of Kathy Buffington, our Volunteer Coordinator, and Pastor Larry Stappler, who is the chaplain.

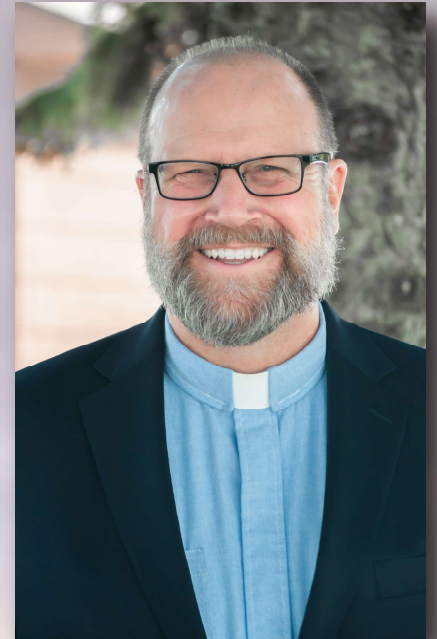
Immanuel, God with us, is our heart and soul of ministry. With a wide variety of residents, staff, and their families, we seek to be a caring pastoral presence to everyone.

We provide three Sunday worship services, three Bible studies on Mondays, devotions, visitation, hospital visits, and "on call" ministry to all. We also regularly host weekly Catholic services and other ecumenical Bible studies.

First and foremost, we are a community, where we live and serve together, and where your Pastoral Care Team seeks to live out the "Immanuel Spirit" both here and in our communities.

May God continue to bless our mutual ministry, and this place called Immanuel!

Peace,



**Pastor Larry Stappler**  
Director of Pastoral Care



## THANK YOU TO OUR VOLUNTEERS

Immanuel Lutheran Communities benefits from the gift of shared time and talent of over 300 volunteers. Flexible schedules allow for volunteering nearly every day, several times a week, monthly for programs, or on the occasion of an annual event. Volunteers do a variety of things with residents, such as: reading, going for walks, teaching to knit, playing bingo, or sharing highlights from a recent trip. All of these things and more contribute to building relationships with residents. Volunteers also assist in other tasks including: making lefse, playing piano, helping in the gift shop, making lattes for staff and residents, accompanying a resident to the doctor, or going on special outings, and many other activities too numerous to count. Each of these serves as a bright light within our community, and we truly appreciate all that the volunteers do to care for our residents.



# LEADERSHIP

## IMMANUEL LUTHERAN COMMUNITIES EXECUTIVE TEAM



**Jason Cronk**  
Chief Executive  
Officer



**Teryn Waldenberg**  
Chief Financial  
Officer



**Carla Wilton**  
Chief Operating  
Officer



**Heidi Hickethier**  
Foundation Director



**Dave Jolly**  
Director of Facilities



**Rebecca Timis**  
Director of Human  
Resources



**Pastor Larry Stapler**  
Director of  
Pastoral Care



**Dwight Shaffer**  
ISCC Asistant  
Administrator



**Michael Weideman**  
Assisted Living  
Director



**Andrew Nelson**  
Director of Food  
& Beverage



**Kathy Lembrich**  
Director of Nursing



**Lizzy Sheeran**  
Executive Assistant  
to CEO



**Tracy Bridges**  
Director of Marketing  
& Public Relations



**Rebecca Kovarik**  
Guest Services  
Coordinator



**Renah Thompson**  
Rehab Services  
Manager



**Deb Walton**  
Director of Life  
Enrichment



**Hannah Brown**  
Recreation &  
Wellness Manager



**Sue Malinowski**  
Director of Social  
Services



**Curt Lamm**  
Corporate Compliance  
& Risk Officer

## OUR CORE VALUES

COMPASSION, EXCELLENCE, RESPECT, INTEGRITY,  
POSITIVE WORKPLACE, STEWARDSHIP



# A PASSION FOR POSSIBILITIES

IMMANUEL LUTHERAN COMMUNITIES BOARD MEMBERS

**Tom Lund**  
President

**Linda Conners**  
Director

**Dan Johns**  
Director

**Bill Schottelkorb**  
Director

**Jim Heim**  
Vice President

**Mike Conner**  
Director

**Colleen Karper**  
Director

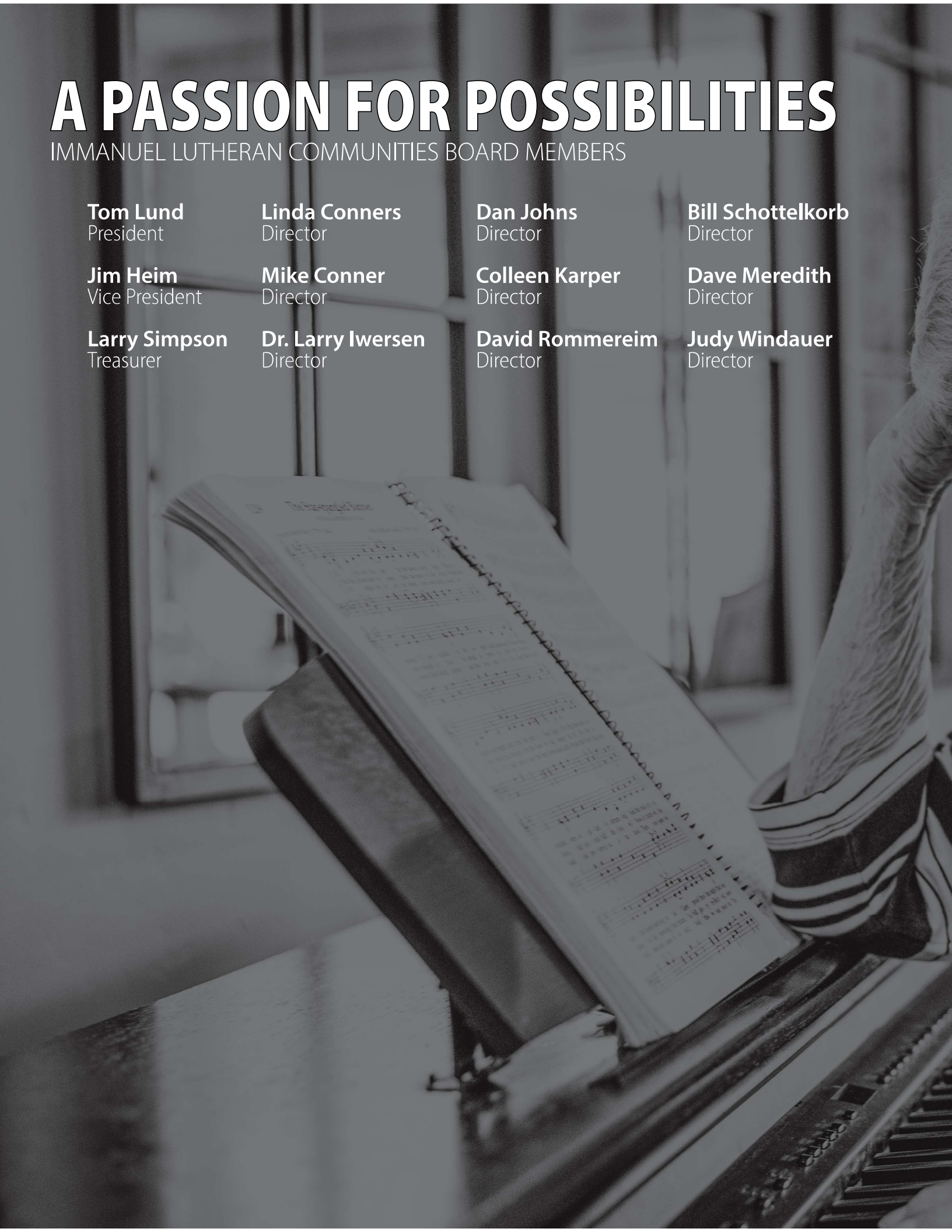
**Dave Meredith**  
Director

**Larry Simpson**  
Treasurer

**Dr. Larry Iwersen**  
Director

**David Rommereim**  
Director

**Judy Windauer**  
Director









# Immanuel Lutheran

— COMMUNITIES —

We ask. We listen. We serve.

185 Crestline Avenue  
Kalispell, MT 59901

