2018 annual REPORT

David Relf Carlsen, Board Member, continues the legacy of his great, great, great aunt Sister Annette Relf, founder of Episcopal Homes.

125 YEARS Celebrating Generations of Generosity
Dear Beloved Community,

As I look back on the past 125 years, I am humbled by the continued commitment to serving the needs of our elderly population within our Twin Cities community. Many individuals have contributed to ensuring our founding values remain at the center of our day to day work. Whether serving the first two residents of the Church Home back in 1894 or the 1,400 we touch today, it is clear the driving force behind our daily work is the desire to serve our neighbor.

Since our humble beginning, philanthropy and generations of family support have been vital to the excellence and growth of Episcopal Homes. Most significantly, in the last twenty years, your support has expanded our reach and enriched our community experience beyond what I could have ever hoped. You have helped us find new ways to serve elders while achieving national recognition for quality and unparalleled resident satisfaction levels.

Your support remains vital as we respond to the challenges of today, like new regulations that put pressure on already tight budgets and the heartbreaking percentage of elders experiencing homelessness. Because of your support we are able to embrace a vision that goes beyond simply helping elders survive. We aspire to help elders live fully—to thrive.

As we look to the future, we will continue to seek dynamic ways to ensure the least fortunate among us are cared for. You—our donors, families, volunteers and community members—remain critical to our continued success just as you have been for the last 125 years.

With gratitude,

Sister Annette Relf
Founder, Episcopal Homes of Minnesota

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**Our Mission:**

*Enriching life and building community with older adults*

**Our Values:**

- **Respect:** We honor the inherent worth, dignity and unique individuality of every human being.

- **Community:** We establish relationships of trust and belonging where each person benefits from and contributes to a culture of mutual care and commitment.

- **Tradition:** We celebrate our Episcopal spiritual heritage, our 125 years of history and reputation of quality of service, and the multicultural traditions of our urban community.

- **Learning:** We are responsive to changing needs and embrace innovation in our programs, facilities and services.

- **Hospitality:** Everything we do has a heartfelt message of welcome and our home is a place of comfort and nourishment.

- **Stewardship:** We hold ourselves accountable for our decisions that affect people and to high standards of ethics and prudent use of resources.

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*Today,* Episcopal Homes serves 1,400 older adults annually who reside within ten communities situated at key light rail stops along University Avenue in St. Paul and at Becketwood Cooperative in Minneapolis.

Episcopal Homes’ communities offer a full continuum of service, including independent apartment; home care; assisted living; and memory, skilled and rehabilitative care. Sixty-nine percent of apartments offer subsidized affordable housing, the majority of all residents are low income and 40% are people of color.

While offering top rated quality, housing and healthcare, the true differentiator of Episcopal Homes is its unique focus on building communities that enrich the lives of older adults. We do this by promoting holistic wellbeing, active civic engagement and vitality of a diverse population of seniors.
Many families have come together to support Episcopal Homes’ mission across generations. One family can trace its commitment to serving the needs of St. Paul elders all the way back to Episcopal Homes’ beginning.

David Relf Carlsen, Episcopal Homes’ newest board member, is the great, great, great nephew of Sister Annette Relf. David’s sister, Mary; mom, Katy and uncle John have served on the board before him. Others in his family have been involved in various capacities throughout the 125 years since our founding.

David’s mother, Katy, who joined the Church Home board in the 1970s and father, Ted, often spoke of Episcopal Homes’ heritage to their four children and were proud of their family ties hearkening back to the organization’s roots. The family learned from an early age they should give back to their community by finding ways to continue the tradition of serving older adults. “We were taught that Sister Annette did something very special here and that we should be proud, but also that we should support the Episcopal Homes mission,” says Carlsen.

“When my sister, Mary Lilja, could no longer serve on the board of trustees, I decided it was my turn to be involved here and contribute in whatever ways I could. It’s been an honor to be asked, and I’m excited to continue the family legacy.”

Recently, David’s siblings came together to decide how to direct a significant gift given from Katy’s estate. The family will provide endowed support to Episcopal Homes’ wellbeing programs, including Spiritual Life, Creative Ventures and Active Living.

“Many families have come together to support the mission of Episcopal Homes—not just ours. We are thankful to be a part of this broader family of supporters spanning the last 125 years,” says Carlsen.

Before reaching their decision, the family ensured that these wellbeing programs provide tangible and meaningful benefits to residents of Episcopal Homes’ memory care community, Katy’s Cottage. Family contributions in 2015 helped create Katy’s Cottage, a place that holds special meaning for the Relf Carlsen family. David’s mother, Katy, developed Alzheimer’s disease while residing at Iris Park Commons.

After serving many years on the board of trustees and in various other volunteer roles, Katy had to leave her residence at Episcopal Homes because there was no secured memory care unit on campus. David’s grandfather, Kenneth, also suffered from memory issues, further elevating the families’ commitment to ensuring others facing this condition have opportunity to reside in a supportive community setting like Episcopal Homes. In addition to the devoted commitment of Sister Annette herself and these important gifts to Katy’s Cottage and the wellbeing programs, David’s parents also contributed to significant advancements to care and services in other areas, including funding to help add nursing staff in the 1990s; renovate the Church Home in 2006; build Seabury in 2002, Episcopal Homes’ first affordable housing community; and build Cornelia House, Coventry Chapel and a spiritual life endowment as part of a 2002 capital campaign. In sustaining his family’s tradition of support, David has made a significant contribution of his own to the Episcopal Homes Foundation’s new Living Fully Endowment this year as well.

Nancy and Doris met the first day of class. They sat side by side in their wheelchairs and have become lasting friends. One day, as Nancy struggled to paint, Doris said, “I wonder how we can make this happen?” Doris didn’t step in and paint Nancy’s piece. Like Delamater, she honored Nancy’s capacity to discover new ways to grow, create and share.

From Delamater’s perspective, participating in painting class empowered Nancy to connect with others, helping her unwrap herself in a way that her disease wasn’t the lens through which she lived. “Since I met Doris in the painting class, I find myself venturing further out of my comfort zone and doing more than I would have ever dreamed. Without her encouragement, I don’t think I would go anywhere. Last week we ventured down the block in our wheelchairs. Recently, I also started taking the bus to the store. These are things I just wouldn’t have even tried before,” says Nancy.

Episcopal Homes’ wellbeing programs, like Creative Ventures, are funded through generous contributions from families, churches, residents and the Twin Cities community. Please visit www.episcopalhomes.org/enrichment/ for more information on our wellbeing programming.

“Without connections that happen through wellbeing programming, elders would feel isolated and disconnected. They would not be living a full life, and the people at Episcopal Homes live life fully until they are no longer living.” – Joanie Delamater, Creative Ventures Teaching Artist and Spiritual Life Volunteer
Social Accountability is our responsibility and history

2018 Benefit of $2,822,489

Episcopal Homes’ mission is to enrich life and build community with older adults. We fulfill our non-profit mission through a commitment to social accountability and responsibility.

In 2018, Episcopal Homes contributed over $2.8 million in resources to support unmet community needs.

**Enrich quality of life**

$643,218

Episcopal Homes enriches lives through delivery of Creative Ventures, Active Living, and Spiritual Life wellbeing programming to all elders, regardless of their ability to pay.

**Reach out to the underserved**

$59,216

Episcopal Homes facilitates resident and staff-led initiatives to give back to the St. Paul community, such as toy drives, clothing drives, quilt donations, meal services and access to community spaces.

**Serve regardless of ability to pay**

$1,918,048

Episcopal Homes subsidizes housing and services for the 69% of independent apartment residents who have incomes below the federal poverty level, as well as elders served in skilled care settings.

**Improve community health**

$51,599

Episcopal Homes offers health clinics, diabetes education, healthy eating programs and physical fitness initiatives to residents and older adults in the greater community.

**Demonstrate leadership**

$95,249

Managers, directors and staff share time and talents with the greater community and industry through educational presentations, committee participation, professional services, employee scholarships, training and more.

**Improve access to needed services**

$55,160

Episcopal Homes provides free or limited-fee transportation to and from grocery stores, social and cultural venues that older adults may not otherwise have access to. Episcopal Homes also provides space for health providers to deliver clinical services.

**donor event highlights**

**Episcopal Homes’ History; Impact on Midway Neighborhood**

This spring, Brian McMahon, St. Paul historian and former director of University United, an advocacy and building organization promoting University Ave in Saint Paul, shared his research and passion for Episcopal Homes with generous donors and longtime supporters at an appreciation event hosted at Becketwood Cooperative.

A long-time friend of Episcopal Homes, McMahon spoke about the history of University Avenue, its linkage between downtown St. Paul and Minneapolis and the important role the Episcopal Homes land played even before it was annexed by Saint Paul. Sitting inland from the river, he reflected on how the Episcopal Homes land has always been a special place and an important connector.

“It connected the cities, it connected neighborhoods, it connected people — always! That has been its history.”

Connectedness was needed because as Minneapolis grew as a manufacturing center and St. Paul was a head of navigation and transportation – a warehousing hub, McMahon noted that being in close proximity did not mean working together and very few functions were shared.

Episcopal Homes has invested $100 million in housing along the Midway corridor to meet the growing needs of older adults. The investment and development of the area and focus on seniors’ wellbeing since Episcopal Homes founding aligns closely with early visions of the land to be a connector among people as well as the Episcopal Homes mission.

Bishop Brian Prior, Episcopal Church of Minnesota, closes the event with prayer.
125TH ANNIVERSARY FUNDRAISER

Save The Date – September 20th, 2019

125 YEARS
Homecoming
FUNDRAISING CELEBRATION

Come home to an evening of celebration, history and the opportunity to make a difference at the Minnesota History Center.

Call For Anniversary Sponsorship

Sponsorship packages are available at a variety of levels and interests. Join us in supporting Episcopal Homes, our elders and our community with a sponsorship from your business, church or family.

With your steadfast support, Episcopal Homes can continue to make a difference in the community our residents, staff, volunteers and partnering organizations have called home for the next 125 years!

Contact the Foundation at (651) 632-8857 or foundation@episcopalhomes.org

2018 Foundation Financials

2018 Sources of Funds
Contributions (unrestricted and restricted) $846,674.00
Charges to related parties for fundraising $336,040.00
Investment (net) $(361,624.00)
Total Revenue $821,090.00

2018 Uses of Funds
Grants/Transfers to Episcopal Homes of MN $434,677.00
Administrative Expenses & Depreciation $399,109.00
Total Expenses $833,786.00

Foundation Net Assets as of December 31, 2018 $10,344,165.00
Honorng by Giving

Thank you to all of you who remembered family, friends and loved ones through a recent memorial or tribute gift. The listing below reflects gifts given from Dec. 1, 2018 – March 31, 2019.

**Gifts Given in Memory Of:**

- Emily Jay Amore
- Bryan and Virginia Johnson
- Gloria DiFiore
- Tom and Kimberly Dufek
- Joie Healy
- Dr. Margaret Jacob and Lynn Hunt
- Marvin Placer
- Richard “Rick” Randk
- Malcolm McElhaney
- Phil Roe
- Lisa DuVall
- Kristin Swenson
- Rosanna Freese
- Wadi Tekle
- Donald and Suzanne Nevin
- Ellen Walters
- Kathleen Warren and David Furguson
- Peggy and Milton Wright
- Susan Armestone
- Bridgette Triggle
- Georgiana Anderson

**Gifts In Memory Of:**

- Lawrence “Moby” Biever
- Denny Marx
- Logan Patrick
- William J. Bartholomew
- Ann Barkholder
- Elaine Clark
- Pat and Henry West
- Ron Dorsch
- Patricia Freeman
- Logan Patrick
- Felix Debrina
- Julie and Scott Boner
- Kate Gagliano, Parce
- Donna and Lee Gaglian
- Nancy Gaglian
- Thea and Patricia Gaglian
- Rose and Kenneth Peterson
- Gary Foy
- Jeff Tracy
- Ronald Zohrer
- Lisa Bader
- Carve and Bovenman
- Sammy and Cynthia Cauldwell
- Anne Cooks
- Mark Curran
- Riccy and Darcy Ehrman
- Andy Helling
- Jane Helling
- Jeannie and Charles Hallo
- Christy Janty
- Esther Kohler
- Jovian Liddell
- Carol Nordlen
- Ernest Ove
- Angela Roed
- Beth and Michael Record
- Mike and Kathy Schore
- Melissa and Greg Sorensen
- Rose Mary Uve
- Denise Ward
- WELCA Board
- SWOS-St. Paul Synod
- Jessica Wite
- degree Fother
- Marly and Randal Gwosch
- Alby Flood
- Sandy Gilman
- Pat and Henry West
- Virginia Greenman
- John Gruenewald
- Doreen Hiet
- Jerry Quinn
- Isadore M. Jabeen
- David A. Johnson
- Ann Moizer
- Nan Skorton and Peter Leahz
- Gerald and Julie Nickerson
- Phyllis and Stanford Lohmann
- Karlen C. Phillips
- Lorraine Kumble
- Barbara Quinn
- Pat and Henry West
- Florence Schaller
- Dorey Marx
- Jill and John Thompson
- John Alfred Simon
- Malcolm McDonald
- George T. Fine
- Patricia Evanson
- Logan Patrick
- Yolanda Tung Vogran
- Jay and Sharon Overbaugh
- Jennifer M. Williams
- Lorensv and Stanley Williams
- Irene Wang
- Troy and Ronanee Wong

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**In Memory of Love and In Memory of the lives of people for education, Lois’s family and friends designated more than $1,300 to support local scholarships.** We are grateful to have had Lois and her family as part of our community for so many years and to have had her family honor her memory in this way.

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**Sister Annette Society**

- Anonymous (2)
- Sharon Irvin Adkins Estate
- Joseph H. Albracht Estate
- John B. and Virginia Edgerton Foundation

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**Lifetiming Giving $4,500 or More**

- Carol Nordeen
- Jacqueline Lerdahl
- Christine Janty
- Betsy and Duey Erlien
- Sammy and Cynthia Casalenda
- Alice Baier
- Ronald Zweber
- Gary Smith
- Bruce and Kristin Petersen
- Thomas and Patricia Galligan
- Nancy Galligan
- Dennis and Lori Galligan
- Fern Doherty
- Logan Patrick
- Eleanor Clark
- Ann Burkholder
- Georgiana Anderson
- Peggy and Milton Wright
- Susan Armestone
- Bridgette Triggle
- Georgiana Anderson

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**2018 Donor Honor Roll**

We pay tribute to all of you who supported Episcopal Homes in 2018. We offer our deepest gratitude to you who make a difference in the lives of residents and families we serve.

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**In Memory Loe Wertz 1927 – 2019**

Lois Wertz was a treasured resident of Geneva House, 6th floor of The Park Commons for many years.

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**In Memory of love and in honor of her lifetime of education, Lois’s family and friends designated more than $1,300 to support local scholarships.** We are grateful to have had Lois and her family as part of our community for so many years and to have had her family honor her memory in this way.
The Rev. Diane McGowan & James Chip Otness
Helen Olson
Mr. Richardson B. & Susan Okie††
Doris E. Nowlin†
Eliphal Nichols Estate
Messiah Episcopal Church, St. Paul
Alice J. McIntosh†
Harold & Mary Mattlin††
Dianne Marshall
Mary E. Lowry†
Elizabeth & Peter Lockwood††
George Latimer
Richard & Jan† Kohout
Lawrence & Josephine King††
Mr. & Mrs. Arthur Kemp††
Mildred Haley Kellogg Estate
Mike & Christine Karel
John G. Ordway, Jr.†
Donald Jones†
Jim & Jan† Johnson
Erling O. & Geneva Johnson††
Mary Heltsley
Dorothy Havlisch†
The Rev. Rosalie Heffelfinger Hall†
Elsie Grimes†
Nicholson Family Foundation
Charles & Elizabeth Woehrle††
Grace Willard Estate
Mary Whiteman
Western Bank
Wellington Management
Marion Warwick
Philip & Carol Armstrong
Laurie Jepson & Steve Rowley^*
James & Marjorie Jacobsen
Gertrude Ingebritson*
Anne H. & Kenneth E. Hultberg
Mary Hassell^*
Dr. Lyn & John Lawyer^*
Dr. Margaret Jacob & Lynn Hunt
Carol Forbes
John & Virginia Edgerton Estate
Darrell Butterwick^*
Brian & Jane Ostenso^*
Mairs & Power, Inc.
George Latimer
Chris & Dick Howard^*
Mary & Peter Gove
Dr. Mitchell Pearlstein^*
Robert Bishaw^* Virginia Betlach†
Lindsay & David Becker^*
Nancy Baker & Dan Olson
Cheryl Bailey^*
Kristin Aitchison^*
Josepha R. Petrus
Nancy & Marvin McNeff
Malcolm McDonald
Anne & Lewis Kamiri^*
David A. Johnson
Regina Hogarth*
Jean Dean^*
Mark & Mary Davis Foundation^
Ann E. Burkholder
James & Bonnie Boehm
Mark Beatt^
Friends & Family of Bob Abel
Patricia Schumacher
Marion Phyllis Sandberg Estate
Lily Rothchild Estate
Bob & Judith Rau
William B. & Margaret Flamm††
The Rev. Kay Pryor
R. T. Moore
Bob & Judith Raz
Marge & John Rolf
Bill & Susan Reif
The Salvation Army
Rosalind F.
The Rev. John and Joan Luth
Brenda Libby
The Rev. Jan & John Luth
Brenda Libby
The Rev. Janie M. & John Luth
Brenda Libby
The Rev. John Luth
Brenda Libby
The Rev. John J. Luth
Brenda Libby
The Rev. John H. Luth
Brenda Libby
The Rev. John G. Luth
Brenda Libby
The Rev. John F. Luth
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The Rev. John E. Luth
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The Rev. John D. Luth
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The Rev. John C. Luth
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The Rev. John B. Luth
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Brenda Libby
The Rev. John W. Luth
Brenda Libby
The Rev. John V. Luth
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The Rev. John P. Luth
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Gifts in Kind

Sherry Schack
Steven Sarrazin
Jean Probst
Sarah Nowlin
Chanpraney Nhul
Mac McClellan
Dusty Mairs
Mary Leinfelder
Marianne Kosel
James Huber
Chris Howard
Tom Hove
Dick Guiton
Peter Gove
Melissa Gilbertson
David Gemmel
Dianne Del Giorno
Christina Boehm Carlson

YMCA Teen Thrive
St. Thomas University
St. Mark’s Catholic Church
St. Clement Episcopal Church Choir
SPPS Focus Beyond
Secondhand Hope
MLK Day of Service Volunteers
Minnesota Internship Center
Hubb Center for Lifelong Learning
Holy Apostle’s Episcopal
Don’t you Feel It, Too Dancers
Cub Scout Pack 70
St. Edwards Episcopal Church,
Karen Wendt
Elizabeth Canelake
Ronald Zweber
Gayle Reynolds & Paul Windschitl
Brian Willette
Bruce & Cheryl Warkentien
Marlene E. Walsh

Alzheimer’s Buddies
Church Healing Ministry
Episcopal Church Choir
Transition Services
(MNIC)
St. Paul Community Group
Church Youth

Call for suggestions for improvement

As part of our commitment to the Baldridge quality improvement standards, we invite your suggestions and ideas for improvement.
Email: compliance@episcopalhomes.org
Phone: 651-272-4910
Web-based comments and suggestions:
episcopalhomes.org/contact-us/report-complaint-2/
Our Communities

Transitional Care & Long-Term Care
Episcopal Church Home
1879 Feronia Ave
St. Paul, MN 55104
651-646-4061

Long-Term Care
The Gardens
1860 University Ave
St. Paul, MN 55104
651-632-8801

Assisted Living & Memory Care
Iris Park Commons & Katy’s Cottage
1850 University Ave
St. Paul, MN 55104
651-646-1026

Catered Living
The Terrace at Iris Park
502 E. Lynnhurst Ave
St. Paul, MN 55104
651-272-4960

Independent Living
Cornelia House
1840 University Ave
St. Paul, MN 55104
651-288-3931

Affordable Living:
Seabury
1830 University Ave
St. Paul, MN 55104
651-379-5102

Kings Crossing
500 N Dale St
St. Paul, MN 55103
651-493-4606

Carty Heights
412 Dunlap St N
St. Paul, MN 55104
651-288-1142

Midway Pointe
1880 University Ave
St. Paul, MN 55104
651-209-8500

Managed by Episcopal Homes: Becketwood Cooperative
4300 W. River Parkway
Minneapolis, MN 55406
612-722-4077

KINDER VILLAGE
Intergenerational Child Care
Summer Enrollment Open!

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EMAIL: ktonda@episcopalhomes.org

www.episcopalhomes.org