

Community

A MAGAZINE *from* UMRC

Special Edition: UMRC AND PORTER HILLS ANNOUNCE AFFILIATION

Shore *to* Shore

UMRC AND PORTER HILLS
SERVING MORE OLDER
ADULTS ACROSS MICHIGAN



Letter from John Nixon III

Remarkable Harmony

A retired wealth advisor, John has served the UMRC and UMRC Foundation Boards in various roles.

John also serves as Vice Chair for the Porter Hills Board.

Last fall, UMRC became acquainted with Porter Hills, a like-minded, faith-based organization with a tradition of excellence in serving older adults, their families, and their employees who provide compassionate care. Porter Hills was considering UMRC as a potential new partner to collaborate with and prepare for future growth.

Board members and strategic team leaders from both organizations pored over thousands of pages of financials and pro formas as part of a six-month due diligence process. While important, of course, the

final piece that completed the puzzle was our shared mission and philosophy of providing innovative care for older adults and their families, benevolent care for residents who have exhausted their resources, and outstanding places for our staff to work. To our great delight, we found remarkable harmony between our respective ideals, team cultures, and visions for the future.



John Nixon III

Our affiliation announcement on March 1, 2019 marked a historic moment, not only for UMRC and Porter Hills, but for senior living in Michigan as well. We believe these two mission-driven organizations are stronger together, as we cement our efforts to constantly pursue excellence and consistently seek out new and better ways to serve a growing population of older adults and their families.

Sincerely,

John Nixon III
UMRC Board Chair

UMRC and Porter Hills Announce Affiliation.



Letter from Mary Wagner

Strong Connections

Mary brings experience as both a registered nurse and a leader in health care strategy and operations to her role as Board Chair of Porter Hills and Vice Chair of the UMRC Board.

As Porter Hills began looking at potential partners for affiliation, we kept coming back to UMRC. 'They're our kind of people,' was a recurring statement among our leadership team. We felt a strong connection between our two organizations – including UMRC's beautiful facilities; the way UMRC treats and cares for its residents, families, and staff; and its thoughtful planning and vision. It has been a fabulous experience to work with an organization like UMRC with an ethos and priorities that so closely mirror our own.

In many ways, there will be no changes as a result of this historic affiliation. Both UMRC and Porter Hills will remain in existence, guided by their faith-based missions to serve older adults as they have since being founded. Residents of each organization will continue to enjoy the same caring relationships with staff.

However, as an affiliation, UMRC and Porter Hills are stronger together, leveraging our combined strengths to create opportunities for greater efficiency and effectiveness to serve the growing number of Michigan's older adults. Over time, you will see enhancements to our locations and services for older adults as part of adopting each other's best practices.

We look forward to taking this journey with you!

Sincerely,



Mary Wagner
Porter Hills Board Chair



Mary Wagner



Stronger Together

Shore to Shore

UMRC AND PORTER HILLS ANNOUNCE
AFFILIATION TO SERVE MORE SENIORS ACROSS MICHIGAN

Michigan's growing older adult population makes it the fastest aging state in the U.S. Recently, two of the state's top-rated senior living organizations made a monumental announcement to advance care and services for older adults.

On March 1, United Methodist Retirement Communities (UMRC) and Porter Hills Presbyterian Village (Porter Hills) finalized their decision to affiliate under shared governance and leadership. The announcement was made at a press conference and official signing event held at LeadingAge Michigan, of which both are members.

UMRC is now the sole shareholder of Porter Hills; previously the share was held by Westminster Presbyterian Church in Grand Rapids. Both UMRC and Porter Hills remain in existence as nonprofit organizations and will continue to serve older adults as they have since being founded. Each will maintain

separate boards, with representatives of both organizations serving on each board. The UMRC and Porter Hills senior leadership teams have combined to become one joint strategic team, with Stephen Fetyko serving as interim CEO and John Thorhauer as President and Chief Strategy Officer. Both will serve UMRC and Porter Hills until a president and CEO is chosen by both boards.

The UMRC Foundation and Porter Hills Foundation will also remain as separate entities with Wendy Brightman serving as president. Donations will remain local and be used for the purposes designated by the donor.

John Nixon III, Chair of the UMRC Board, shares the excitement of both UMRC and Porter Hills for affiliation: "We believe this affiliation will allow us to serve even more seniors, from shore to shore, across Michigan. With over 160 years of combined history, serving thousands of older adults and their families, and a strengthened financial footing, UMRC and Porter Hills are well positioned for the future." ■

Dave Herbel, President and CEO of LeadingAge Michigan (center) presents proclamations from the State of Michigan to Mary Wagner and John Nixon.



UMRC, PORTER HILLS, AND THEIR AFFILIATES:

RANK IN THE TOP

75

OF U.S. NONPROFIT ORGANIZATIONS.

2

MAKE UP THE SECOND LARGEST NONPROFIT SENIOR LIVING ORGANIZATION IN MICHIGAN IN TERMS OF REVENUE.

OFFER A COMBINED

24

SERVICE LINES AND LOCATIONS TO PROVIDE STATE-OF-THE-ART CARE FOR OLDER ADULTS.

ARE PLACED AMONG THE COUNTRY'S TOP

25

NONPROFIT AFFORDABLE HOUSING ORGANIZATIONS.

SERVE MORE THAN

6,700

OLDER MICHIGAN ADULTS ANNUALLY ACROSS 22 COUNTIES IN THE LOWER PENINSULA.

REPRESENT A

\$150

MILLION ORGANIZATION.

EMPLOY OVER

1,300

STAFF AND HAVE EARNED RATINGS AS TOP PLACES FOR PEOPLE TO WORK.



WEST MICHIGAN'S
BEST AND
BRIGHTEST
COMPANIES
TO WORK FOR
WINNER 2018

The Guiding Compass

While UMRC and Porter Hills each can boast of beautiful, state-of-the-art facilities, it is the personal touch of their care partners that truly make these communities feel like home to the older adults we serve. Nadine Byrum and Shirley Evans are two that truly care about each resident like family.

Nadine Byrum from UMRC

Nadine Byrum, R.N. has seen a lot of changes in the healthcare field over the years during her career as a nurse, including two decades at UMRC's Kresge Healthcare and Rehabilitation Center. "From paper records to computers, dial phones to texting, and moving to a more homelike atmosphere," says Nadine. "It has been exciting to be part of all that has evolved at Chelsea Retirement Community (CRC)."

Nadine is now involved as a member of the Action Pact steering team as UMRC implements the culture change model of care at the Kresge Center.

"It is always a challenge to start something new, but I am excited to be part of working toward a more positive experience and a feeling of home for the older adults in our care."

"I feel so close to the residents," says Nadine. "Each person has their own stories, wants and needs. It has been an honor to meet them and to get to know their families. I am thankful to be their friend."

"She builds such close connections and relationships with the residents, their families, and her co-workers as well," adds Kathy Russell, Associate Executive Director for CRC. "Her longevity and devotion are such assets to the quality of care we provide to older adults and the camaraderie among our staff."

"We have so many caring people here in every department," says Nadine. "It is my pleasure to be part of the CRC team." ■

Shirley Evans from Porter Hills

Shirley Evans loves her job as a care partner at Meadowlark Retirement Village in Sparta, and it shows. A 2017 recipient of LeadingAge Michigan's Caring Spirit award, Shirley "has a very warm heart," according to Life Enrichment Coordinator, Catherine Kuzma. "She genuinely cares about the residents' well-being and will do everything in her power to provide for their needs."

Phyllis Alber Shares a Smile with Nadine Byrum.





Shirley Evans Enjoys Visit with Mary Jean Herwaldt at Porter Hills Meadowlark.

Shirley says learning about the rich history of the residents is her favorite part of working at Meadowlark. "I love to hear about their lives and vocations," says Shirley, including one resident who played piano and organ for silent movies as a teenager. "This generation is so appreciative and thankful for every single thing you do for them."

Meadowlark utilizes the Household Model of care, which Shirley says has really helped staff get to know their residents. "It gives us more flexibility to attend to each resident's needs and wishes. Because we care for the same residents each day, there is consistency and a feeling of trust that is so very important. They are my second family."

With nearly 30 years of service at Meadowlark, Shirley is a highly regarded member of the team by residents and staff and has even cared for three generations of elders. Says Catherine, "Shirley is the one that other care partners go to for wisdom. She is very much valued here." ■

Honoring Our Faith-Based Heritage and Guiding Beliefs

United Methodist Retirement Communities and Porter Hills share similar origins. UMRC got its start in 1906 when a group of Methodist pastors and lay leaders envisioned a way to provide a lifetime of caring and dignity for "the lonely aged." Some fifty years later, pastors and members of Westminster Presbyterian Church in Grand Rapids dreamed of building homes for the aging and accepted the challenge, creating Porter Hills. Today, the faith-based missions of both UMRC and Porter Hills serve as the compass that guides this affiliation, ensuring a future of caring for older adults and their families.



Steve Fetyko
interim CEO, Porter Hills

"As organizations built on faith, we continue to be committed to our guiding belief of inclusiveness of all aspects of human diversity," says interim CEO, Steve Fetyko. "We seek to honor our faith-based heritage and our commitment to our guiding beliefs. Together, our faith continues to resonate through all we do to provide outstanding, compassionate care and services for older adults and their families." ■



Affiliation Announcement Attracts Statewide and National Media Attention.

Letter from Wendy Brightman

Effective Stewards

A seasoned, nonprofit leader, Wendy's personal mission is to elevate funding for the needs of older adults. She joined the UMRC Foundation in 2012.

"What we do today sets the stage for growth and opportunity for each and every one of the older residents we serve, and for future generations."

— Wendy Brightman

The United Methodist Retirement Communities (UMRC) Foundation and Porter Hills Foundation are privileged to have earned your generosity and trust over the years. While our organizations are affiliating, each foundation will remain as a separate entity.

After leading the UMRC Foundation as its president since 2012, I am delighted for the opportunity to now serve as president of both the UMRC Foundation and Porter Hills Foundation as we move forward in this affiliation.

In addition, I am thrilled that Joanna Hogan has joined our team as Vice President of Philanthropy. Joanna brings more than two decades of philanthropic leadership and a passion for serving the needs of older adults, including her former role at Clark Retirement Community in Grand Rapids. Most recently, as President of Impact for Success, Joanna used her experience as a strategic fundraising coach to educate and train fundraising professionals and nonprofit leaders.

All of us at UMRC Foundation and Porter Hills Foundation appreciate how important philanthropy has been in our history and how vital it is for our future. Thoughtful donors have made a tremendous impact on the lives of the older adults and communities we serve, and we are committed to upholding each donor's intent. Both Foundations are committed to remaining effective stewards of the funds with which we have been entrusted, assuring that all donations will remain local and will be used for the purpose designated.

We look forward to visiting with you in the months to come to share initiatives and progress.

With warmest regard,



Wendy Brightman, MML, CFRE
President, UMRC Foundation and Porter Hills Foundation



Wendy Brightman



Sharing Best Practices

A retired public servant, Mark is active in the community and shares his expertise in many local boards and fundraising campaigns. Mark joined the UMRC Foundation Board in 2013.

The UMRC Foundation has accomplished so much in its 20+ year history – from bringing Towsley Village Memory Care Center to fruition on UMRC's Chelsea campus in 2000; to raising \$27.7 million through the **Growing to Serve** comprehensive campaign which completed in December 2018. The success of the UMRC Foundation has been pivotal in launching and expanding capital projects, resident services, life enrichment activities, and the Benevolent Care Fund – the cornerstone of the UMRC Foundation.



Mark Ouimet

This level of fundraising in the senior living industry is virtually unheard of. It is made possible only through the dedication of the UMRC Foundation staff, the commitment of its board members, and the generosity of thousands of friends and donors. Each has made it a priority to support the needs of older adults and to fulfill the UMRC Foundation's mission: to promote the wellness, dignity, and independence of older adults by supporting the residents, staff, and communities UMRC serves.

Since just 2013, the UMRC Foundation has raised over \$33 million, creating a tremendous impact on the lives of older adults in Michigan, their families, our excellent staff that provides care and services, and the communities where UMRC has a presence.

I am thrilled to have an opportunity to extend this reach through our affiliation with Porter Hills. The UMRC Foundation is in a unique position to share its best practices with Porter Hills Foundation and, in the process, touch the lives of additional older adults across the state and those who care for them. We look forward to what the future holds!

With warmest regard,

Mark C. Ouimet

Mark Ouimet,
UMRC Foundation Board Chair

"I am thrilled to have an opportunity to extend this reach through our affiliation with Porter Hills."

— Mark Ouimet



Honoring Faith-Based Traditions

A Chartered Financial Analyst, Jay brings 25 years of experience in equity and fixed income portfolio management and research to his role on the Porter Hills Foundation Board where he has served since 2014.

*"I am excited
and eager to
unpack all
that the future
holds for the
Porter Hills
Foundation."*

— Jay Wisentaner



Jay Wisentaner

The Porter Hills Foundation was established in 1995 to support three goals for the older adults in our care: provide benevolent financial assistance to eligible residents who have outlived their financial resources, enhance care through resident enrichment projects as well as staff education and training, and support Porter Hills' capital needs and projects.

Through the due diligence process that led up to our recent affiliation with UMRC, we were pleased to see that not only were UMRC and Porter Hills a good fit, but that the purpose and missions of our Foundations were closely aligned as well. Our similar faith-based traditions that focus, particularly, on those who are low-income or who have outlived their savings, make it clear that this affiliation will have a lasting and positive impact on Michigan's older adults. Rest assured that all donations will remain local and will be used as intended by the donor.

On behalf of the Porter Hills Board of Trustees, I am excited and eager to unpack all that the future holds for the Porter Hills Foundation. We welcome Wendy Brightman who is taking the helm as President for both the UMRC Foundation and Porter Hills Foundation, and Joanna Hogan joining the Porter Hills Foundation team as Vice President of Philanthropy. These two share a combined total of nearly forty years of success raising tens of millions of dollars on behalf of older adults.

Stronger together, I anticipate great things ahead for the Porter Hills Foundation and those we serve.

Sincerely,



Jay Wisentaner,
Porter Hills Foundation Chair



UMRC

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