

Celebrating

135
YEARS

FY23 Annual Report



 **Immanuel**
Here for you. Not for profit.

Our Story

Serving Seniors in Nebraska & Iowa since 1887.

The beginning

Immanuel began with Pastor E.A. Fogelstrom and five deaconesses. They were dedicated to “works of mercy” and established programs that cared for the community’s most marginalized — the sick, orphaned, and elderly.

1887

Early days

Immanuel spends time as an orphanage, a hospital, a home for “invalids” and the elderly, and a nursing school.

1880-1959

Identity

Immanuel became a part of the newly formed Lutheran Church in America.

1963

1974

1982

A vision

Immanuel Village opened, the first of Immanuel’s modern senior living campuses.

1998-2011

A future

The foundational years of modern-day Immanuel (1998-2008). Lakeside (Omaha), Trinity Village (Papillion), The Landing (Lincoln), Immanuel Courtyard (Omaha), and The Lighthouse (Omaha) were opened, and Pacific Springs (Omaha) was acquired.

Development

Immanuel Hospital and Community Mental Health Center Open.

Immanuel Pathways was formed (2010), and the Immanuel Community Foundation was created (2011).



2012

2013

2015

2019

2021

2023

A change

Immanuel resigned sponsorship of Alegent Creighton Health to develop a full continuum of post-acute care ministries and expand areas served.

PACE® in Iowa

Immanuel opened PACE® (Immanuel Pathways) in Des Moines, its second campus in Iowa (Southwest Iowa PACE®, 2012.)

Two new faces

Immanuel acquired Deerfield (Des Moines, Iowa) and Grand Lodge (Lincoln, Nebraska) from Life Space Communities, bringing the number of market-rate communities to ten.

PACE® in Nebraska

Immanuel pioneered PACE® (Immanuel Pathways) in Nebraska. Today, Immanuel is still the only PACE® provider in Nebraska.

Who we are

Immanuel has eighteen independent living, assisted living, memory support, and long-term care communities on eleven campuses and three PACE® locations serving eighteen counties in Nebraska and Iowa.

Growth

Immanuel acquired Copper Shores Village (Des Moines, Iowa) and opened Newport House (Omaha, Nebraska.)

Our mission is to “Provide Christ-Centered Service to Seniors, Each Other, and the Community.” At our core, we believe that all people will grow and age with dignity, safety, and wellness.

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A Letter from the CEO

To our Immanuel Community,

With immense pride, I present our Fiscal Year 23 Annual Report, celebrating our 135th anniversary. This remarkable milestone serves as a testament to our organization's enduring legacy and unwavering commitment to positively impacting the lives of seniors in Nebraska and Iowa.

Since our founding in 1887, our nonprofit organization has been dedicated to providing exceptional care and support for seniors in their well-deserved retirement. Over the years, we have built a strong reputation for excellence, and I am pleased to report that our mission remains as steadfast as ever.

Our continued success and growth have been possible thanks to the collective efforts of our passionate and dedicated team. From the compassionate caregivers who provide hands-on support to our residents and participants, the innovative leaders who drive advancements in senior healthcare, and the tireless administrative



staff who ensure the smooth operation of our communities and centers, each member of our organization plays a crucial role in delivering outstanding services.

Throughout this year, we have witnessed firsthand the profound impact of our efforts on the lives of those we serve. Our commitment to providing a nurturing and enriching environment for seniors has enabled countless individuals to embrace their retirement years with grace and dignity. We have seen stories of resilience, joy, and fulfillment unfold within the walls of our communities and centers, and it is a privilege to be a part of these journeys.

In addition to the exceptional care we provide, our organization remains deeply committed to serving our local communities. Through strategic partnerships, our foundations, and initiatives focused on enhancing the quality of life for seniors beyond our communities and centers, we have extended our impact far and wide.

As we celebrate our 135th anniversary, we reflect on the remarkable achievements of the past and look ahead to the opportunities and challenges that lie before us. We remain committed to innovation, constantly seeking new ways to improve our services and enhance the overall experience of our residents, participants, and staff. We are investing in cutting-edge technologies, fostering partnerships with leading experts in the field, and exploring novel approaches to retirement living and senior care that will further elevate our organization's impact.

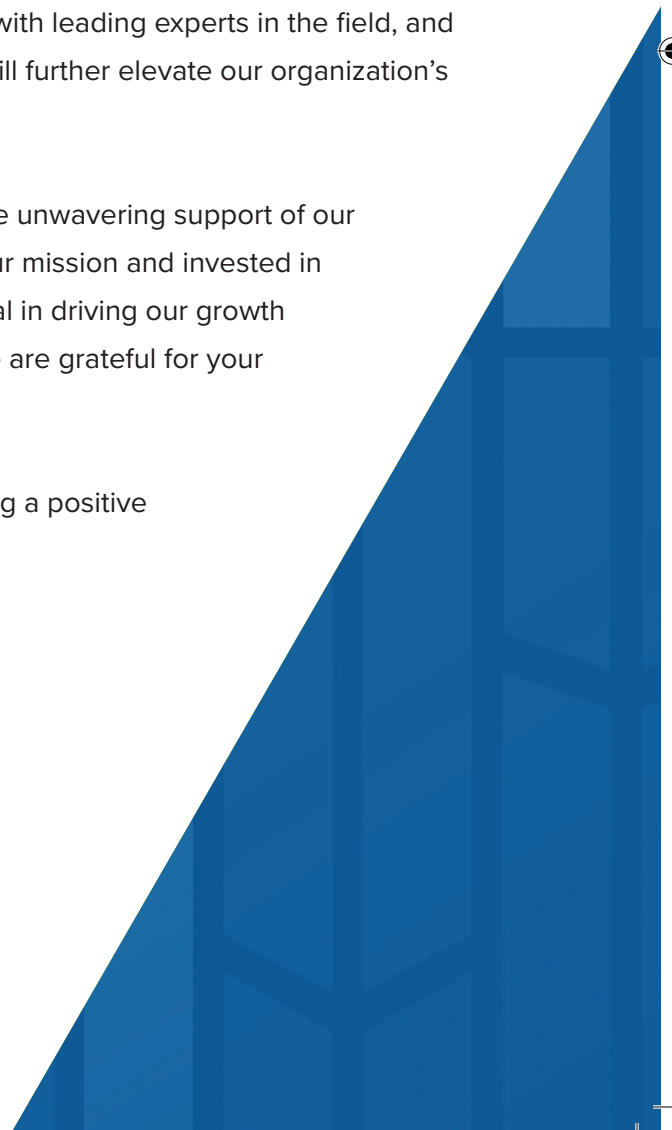
None of these accomplishments would have been possible without the unwavering support of our residents and participants, staff, and partners, who have believed in our mission and invested in our vision. Your continued trust and confidence have been instrumental in driving our growth and enabling us to make a lasting difference in the lives of seniors. We are grateful for your ongoing support.

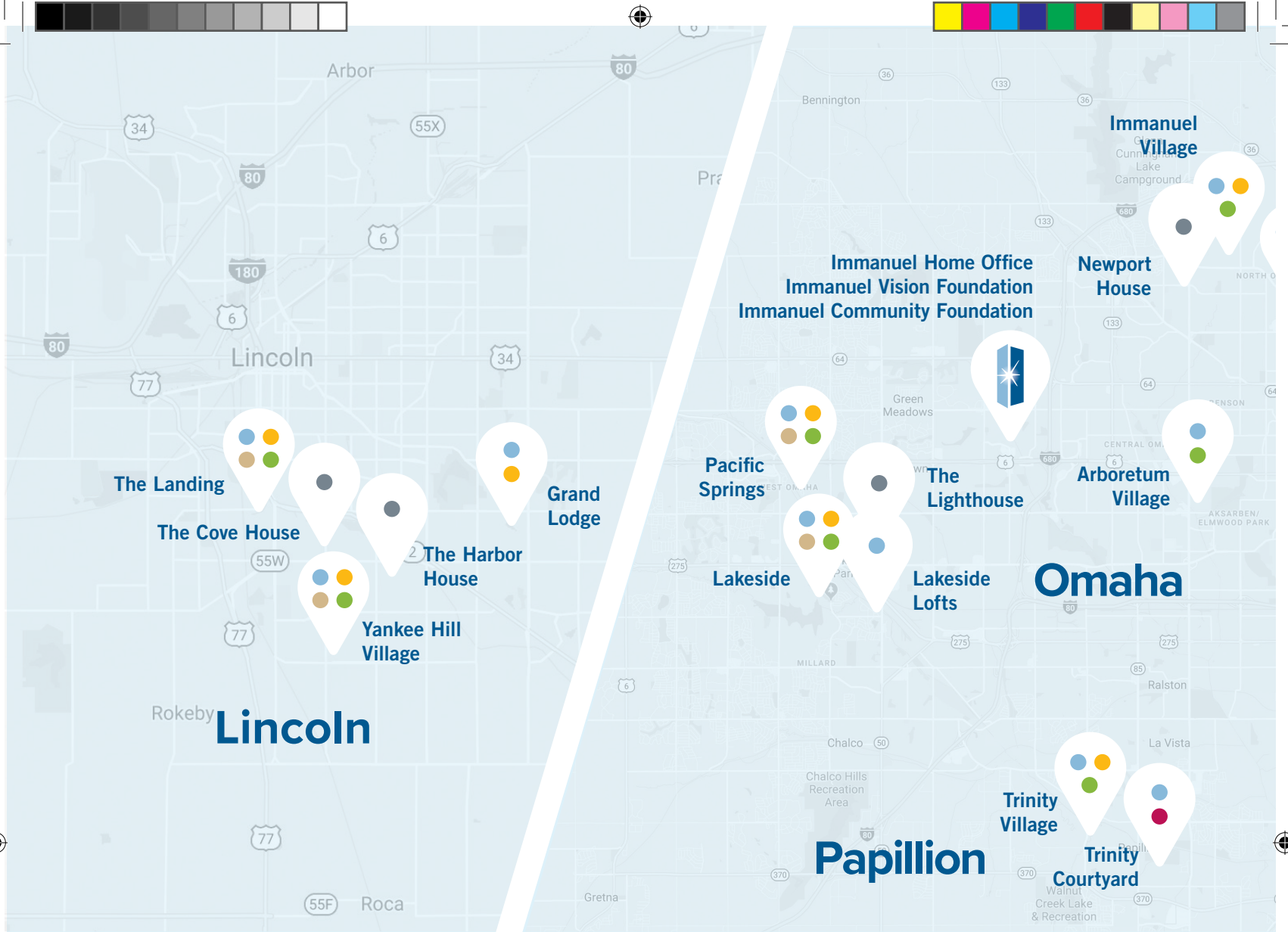
Here's to another 135 years of enriching the lives of seniors and making a positive impact in Nebraska and Iowa.

Sincerely,

Eric N. Gurley

President & CEO





Our Communities and Centers

Where we Serve

Immanuel has eighteen active independent living, assisted living, memory support, and long-term care communities on eleven campuses, and three PACE® locations serving eighteen counties in Nebraska and Iowa.

- **Active Living & Independent Retirement Living**

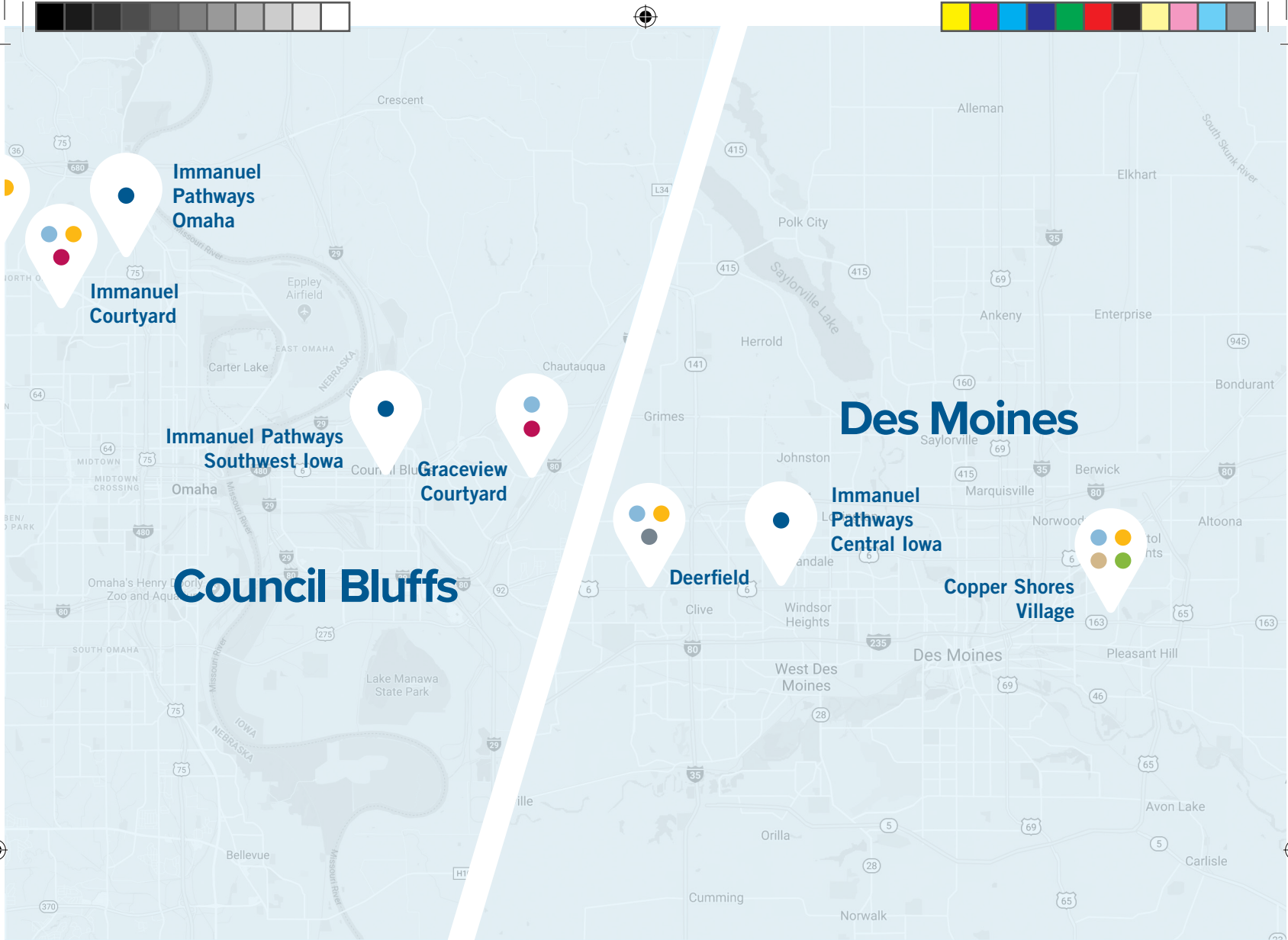
For active individuals looking for relief from the stress of home maintenance.

- **Assisted Living**

For residents who need a helping hand with activities of daily living.

- **Memory Support**

For individuals needing care for symptoms of Alzheimer’s or other forms of dementia.



- **Care Communities (Long-Term & Skilled Nursing Care)**

For residents who require more complex 24/7 medical care.

- **Classic Courtyards (Affordable 55+ Housing)**

For individuals who live with a limited income.

- **Thrive Fitness Centers**

For people fifty-five and older who want to keep their bodies moving and minds sharp.

- **Immanuel Pathways PACE®**

For individuals who are nursing home level of care and would like to remain living in their own homes.



Pictured: Cecil Hicks, Director of Talent, Development, and Culture, presenting a keynote at the annual Leadership Summit.



Our Leadership

Leading the Mission

Executive Leadership



Eric Gurley
President & CEO



Scott Bear
Chief Financial Officer



Julie Kaminski
Chief Operating Officer



Tammy Sealer
Chief Administrative
Officer

Leadership



Joseph Brown
Vice President,
Sales & Marketing



April Butterfield
Vice President,
PACE Operations



John Croghan
Vice President,
Community Ops



Rhonda Distefano
Vice President,
Construction



Dr. Devin Fox
Medical Director



Betty Harris
Vice President,
Human Resources



Alan Jarecki
General Manager,
Culinary Operations



Pr. Brian Maas
Vice President, Mission
& Spiritual Care



Jamie Pearson
Vice President,
IT





A Resident Story

A War Hero Looks Back

The year was 1942. The United States was heavily embroiled in World War II – in Europe, Africa, and the Pacific. It was just months following the attack on the U.S. Naval Base at Pearl Harbor.

Bill Brown, a 103-year-old resident at Immanuel Village in Omaha, Nebraska, was 22 and preparing to enlist when a neighbor who worked on the draft board approached him on the street. It was this conversation that changed his life.

“He said, ‘If you’re going to go in and choose your choice of action, you better do it soon because we’re going to draft you next week,’” Bill recalled. “So, I went and enlisted in the Air Force.”

In July 1942, Bill enlisted at Fort Crook – now Offutt Air Force Base. Flying had long been one of his dreams. He was 7 years old when American aviator Charles Lindberg made his historic flight across the Atlantic Ocean, and the achievement stuck with him.

“I thought that was the most wonderful thing in the world, him doing that,” Bill said. “I never dreamed that 17 years later, I would fly a plane. After I went through training, the Air Force gave me a plane and sent me across the ocean to combat.”

Bill trained in Texas for a year, learning how to fly B-24 Liberator planes, and later joined a crew in Lincoln. In July 1944, at 24, he was assigned to the 93rd Bombardment Group in Hardwick, England, as a bomber pilot. A young man from the Midwest, he never expected to travel to Europe.

“When the United States first started bombing Germany, you had to fly 25 missions to complete your tour,” he said. “It was extremely dangerous, they would send out 60 planes on a bombing mission, and maybe 25 to 30 would come back – they would get shot down and killed.”

During his time in England, Bill would fly 35 missions over German-occupied European territories. His first mission, however, was nearly his last. His plane was hit by anti-aircraft fire, tearing a hole in the aircraft and severing the wires to the electric suit that kept him warm in the frigid high altitudes.

In addition to bombing missions, Bill flew supplies to areas in France where food had become dangerously scarce.

“During the trips we made to France with food, we went to the airport near Paris,” he said. “Even though we had taken it back from the Germans, there were still snipers there who kept firing on us, so sometimes bullets would go whizzing by. We didn’t linger long ... I hated getting shot at.”

Bill flew with the 93rd until the war ended in 1945. His squadron survived all 35 missions without a casualty. For his service to the U.S., Bill was awarded the Distinguished Flying Cross and an Air Medal.

He also received the French Foreign Legion’s Medal of Honor – a thank you from the country for which he risked his life by delivering much-needed food and supplies.

After his service time was over, Bill returned to Omaha. He worked as an accountant and auditor for Union Pacific until his retirement in 1980.

“I became a golf bum,” he joked about his post-retirement life. “I would play three days a week, weather permitting. That’s what I attribute most of my old age to: I got outside, in the sunshine, and I got plenty of exercise playing golf.”

Bill’s independence has always been important to him. When he decided to move into a retirement community in 2018, he said he chose the place that best fit his lifestyle – Immanuel Village. He loves the outdoor courtyards and gardens and enjoys the available social activities.



Photo Credit: www.93rd-bg-museum.org



Photo Credit: www.93rd-bg-museum.org

“I went outside yesterday – it is lovely in the morning,” he said with a smile. “They have a putting green, so they took me out, and I putted a few balls. That brought back some old memories.”

Bill says the keys to a long life are fresh air, sunshine, and plenty of exercise.

Having celebrated his 103rd birthday in July, he may be on to something. Bill admitted that 103 was a birthday he never thought he would see. Even so, he likes to live each day to the fullest.

Bill is an avid reader who frequently gets audiobooks in the mail from the Lincoln (Nebraska) Public Library. His favorites include Westerns, mysteries, and historical novels. His favorite authors include Mickey Spillane and Sir Arthur Conan Doyle.

Bill has family all over the U.S., including a nephew in Omaha who often visits him. Bill said he also feels supported by Immanuel’s staff.

Though he still resides in independent living, he stayed in Immanuel’s Newport House for rehabilitation following a short illness. Newport House is on the same grounds as Immanuel Village, which helped put Bill’s mind at ease and allowed him to focus on getting well.

Senior Living Consultant Deanna Garcia said Bill is popular with and admired by those who live and work at Immanuel Village.

“He is very humble, although he had a remarkable career and served our country extremely well,” she said. “He is known and loved by staff and residents for his quick wit and kindness.”

A video of Bill’s Medal of Honor ceremony can be seen at: www.bit.ly/bill-brown.

Pictured below: The Distinguished Flying Cross, Air Medal, and the French Foreign Legion’s Medal of Honor awarded to Bill Brown.



Fiscal Year 23

What our Team Accomplished



Launch of New Employee Onboarding: We launched an updated first-day experience to help all new employees understand our organization and connect them with our mission, culture, and values. Year to date, 250 new employees participated in Omaha, Des Moines, Iowa, and Lincoln.



Launch of Leaders First Program: This spring, we launched a program to develop new leaders with the skills needed to succeed. Twenty-one leaders from thirteen communities and centers participated in the inaugural session. See more on page 18.



Hospice Certificate: Tabitha and Immanuel entered into a joint venture in 2021 to provide Tabitha Hospice and Home Health services to Immanuel's communities in the Omaha area. In September, we received our certificate to provide hospice service. See more on page 38.



Celebrating ONE Immanuel: 1,000 residents, participants, and staff gathered in Omaha for a resident/staff choir performance, a meal, awards, and a keynote by New York Times Best Selling Author Kate Andersen Brower.



Bloom Model House Opening: Our first 55+ first-stage housing community on the Lakeside campus saw its first house built and opened. The clubhouse is under way and will open in spring 2024. See more on page 22.



Leadership Summit: In March, 300 leaders from across Immanuel gathered in Omaha for the annual event. This year's summit focused on diversity, inclusion, and acceptance. See more on page 18.



Care Navigation Deployment: Omaha market-rate communities were the first to enroll in this new program, created to help navigate the overwhelming experience of a hospital or skilled nursing stay. See more on page 30.



Immanuel Culinary Cup: The Immanuel culinary team brought fourteen executive chefs to Lincoln for an all-day culinary competition. Kaz Yezdi and Brian Hunter were named winners. See more on page 27.



Best of Des Moines: Copper Shores Village in Des Moines, Iowa, was named the Best Retirement Community in Des Moines. They beat fifteen other communities for the award.



200 Participant Milestone: In April, Pathways of Southwest Iowa surpassed 200 participants in the PACE program. One participant said, "I don't believe there is another program as good as PACE. You have given 200 people a better quality of life." See more on page 20.



Graceview Phase II Opened: The addition in Council Bluffs, Iowa, opened and was full within eight weeks of the completion of construction. The expansion adds sixty-five apartments to the campus. See more on page 22.



Deerfield surpassed 90% occupancy: For the first time in its history, Deerfield in Des Moines, Iowa, exceeded 90% occupancy on its campus.





Developing and Acknowledging **Growing our Team**

We are committed to fostering a strong organizational culture and developing influential leaders. Recognizing these aspects' importance, we invested strategically in two essential programs in Fiscal Year 23.

The first program focuses on leadership development, aiming to equip individuals with the necessary skills, knowledge, and mindset to lead effectively.

The second program centers around diversity, inclusion, and equity, acknowledging the value of a diverse workforce and an inclusive environment.

“Leaders First” Implementation

This multi-session cohort program is designed to introduce new leaders with direct reports to the core competencies needed to be a successful manager at Immanuel.

Topics covered in the training included:

- Self-awareness, confidence, and collaboration
- Setting goals, coaching, and feedback
- Motivating, rewarding, and recognizing individuals and teams
- Interviewing, hiring, and onboarding new employees
- Managing conflict
- Self-care and team care
- Business acumen/legal basics



The program launched in February with twenty-one participants from thirteen communities and centers.

Diversity, Inclusion, & Equity

We strive to be a workplace that respects and celebrates individual differences, fostering an atmosphere of acceptance and belonging for all employees.

Through educational workshops, employee surveys, and policy evaluations, our goal is to create a culture where employees feel valued, heard, and empowered to contribute their unique perspectives.

In Fiscal Year 23, we took meaningful steps towards building a vibrant culture and nurturing exceptional leaders who embrace diversity,

inclusion, and equity as integral components of their organizational success.

Our leadership teams, both at the home office and from the field, participated in multiple training sessions with an outside consultant during the year.

At the start of the year, we formed a committee of leaders across the organization to help drive this initiative now and into the future.

Members include Michelle Grigsby (Director, HR Operations & Inclusion), John Croghan (Vice President, Community Operations), Cecil Hicks (Director, Talent, Development & Culture), Betty Harris (Vice President, HR), Cara Williams (Marketing Manager), and Tammy Sealer (Chief Administrative Officer).

Happy and Healthy at Home

Immanuel Pathways

What is PACE®?

Since 2013, Immanuel has been the sole provider of PACE® (Program of All-Inclusive Care for the Elderly) in Nebraska and one of two providers in Iowa. PACE®, which we call Immanuel Pathways, is a Medicare and Medicaid program that helps people meet their healthcare needs in the community instead of going to a nursing home or other care facility. The hope is that participants can remain happy and healthy at home.

Ten years ago, we sensed that the demands on the healthcare system would be shifting due to the introduction of Medicare Advantage programs and a changing retiring population. PACE® is an innovative model of healthcare that we introduced to seniors in our service areas to meet their desires for a new approach to medical services.

To qualify, participants must be at least fifty-five years old, live in the service area of a PACE® organization, meet a nursing home level of care, and have the ability to live safely in the community with help from PACE®/Pathways. Everything from transportation and general health needs to specific therapy plans, social activities, and even snacks and meals are available through this program.



Pictured above: (Left) Immanuel Pathways participants and staff from Immanuel’s Home Office enjoyed a visit to the Henry Doorly Zoo. (Right) The Immanuel Foundation hosted Christmas movie screenings at each of our Immanuel Pathways centers. Before the movie, participants enjoyed a meet-and-greet with Santa Claus.

Fiscal Year 23 Recap

This past year, Immanuel Pathways grew to serve more than 650 participants between three centers: Immanuel Pathways Omaha in Omaha, Nebraska; Southwest Iowa, in Council Bluffs, Iowa; and Central Iowa, in Des Moines, Iowa.

Fiscal Year 23 was a tremendous year of growth, with more than 173 new participants enrolling in the program, a 21% increase over Fiscal Year 22. A milestone of surpassing 200 participants was achieved by Southwest Iowa this year, an accomplishment years in the making. More than fifty-eight of the 173 Fiscal Year participants enrolled at Southwest Iowa, helping them push beyond the 200 mark.

But growth was not the only focus for Immanuel Pathways this last year. In our annual participant satisfaction surveys, participants from all three centers rated their “overall experience and recommendation to others” higher than in Fiscal Year 22, a testament to the intense focus on the participant experience by the Immanuel Pathways teams. Staff also saw increased satisfaction, with turnover decreasing in Fiscal Year 23.



One of the most significant changes this year was the introduction of Natalie Manley, M.D., MPH, as the PACE® Medical Director. Dr. Manley **(pictured on the left)** is a renowned geriatrician with additional palliative medicine training and is a certified hospice medical director. Dr. Manley has been practicing with the Department of Geriatrics, Gerontology, and Palliative Medicine at the University of Nebraska Medical Center since 2015.

During the year, the Immanuel Pathways team focused on transitioning out of the COVID pandemic, which meant bringing participants back into the centers while delivering some services that, through the pandemic, we learned made more sense in participant homes.

The teams also focused on improving communications and the participant experience through a refreshed education curriculum for all PACE® staff. This created an increase in the participant satisfaction scores when asked if “staff listen and care/concern is shown for my questions.”

Finally, Immanuel Pathways Omaha celebrated its 10th anniversary in Fiscal Year 23.



Your home. Your care. Your pace.



Graceview Courtyard



Bloom at Lakeside

Reinvesting in our Communities

Development

This year, our development and construction teams led approximately \$21,000,000 of capital and project work across Nebraska and Iowa. That staggering number does not include the \$3,909,000 that went into continually renovating apartments within the communities for residents.

We believe the recurring investment into innovative housing and our communities bears witness to our commitment to serving seniors with every physical and financial need. We are proud that this annual investment sets us apart from every provider in the Midwest.

Graceview Courtyard Phase II

Immanuel strives to serve people from all walks of life. The need for affordable housing in Nebraska and Iowa continues to rise annually. To meet that growing need, starting in April of Fiscal Year 22, we built a second phase of the existing Graceview Courtyard campus in Council Bluffs, Iowa.

The second phase was completed on time and budget and opened on May 1. Within six weeks, all 65 apartments were occupied. The Graceview team and volunteers from the Home Office moved in six residents a day during May and the remainder in June. The Graceview campus now serves more than 121 lives and is a testament to the need we are filling for affordable housing.



Lakeside Assisted Living Library

Bloom at Lakeside

With the largest retirement population in history coming, we recognize there is a surge of young retirees with different tastes in housing options. In Fiscal Year 23, our Bloom at Lakeside project saw incredible progress. This innovative first-stage pocket neighborhood is one of the first-of-its-kind in Nebraska. It will bring forty-six free-standing custom homes, a clubhouse, active living outdoor spaces, and walking paths around the Lakeside campus. Unlike the other Immanuel communities, the residents will own these homes, with the clubhouse and surrounding common areas maintained by Immanuel.

The model home was built and opened, and additional spec homes began construction. The clubhouse also started development and is set to be opened in the Spring of 2024.

Lakeside Improvements

To meet the changing styles and tastes of the retiring population, the Lakeside campus saw significant improvements in many areas.

The assisted living wing, which serves 49 residents, saw the development of new spaces, such as a new library, activity spaces, and communal areas. The new library features bright natural lighting, a custom mural, and a space for puzzles and reading.

Outside, the new patio includes a reflection garden, a new pond, a walking loop, a bocce ball court, raised gardens, pollinator gardens, grills, and more seating.

Challenging Perceptions of Possible **Immanuel Adventures**

In an inspiring effort to challenge stereotypes and empower seniors, our team created the groundbreaking Immanuel Adventures program.

While aging is a natural part of life, it does not hinder one's ability to embrace new challenges and embark on thrilling journeys. The program aims to redefine the perceptions of what seniors can accomplish by offering unique and exhilarating experiences.

In its inaugural session, the program introduced seniors to rock climbing at a professional gym, showcasing their incredible potential for physical and mental growth.

The program recognizes that age is not a limitation to physical and mental pursuits and aims to provide opportunities for seniors to explore new interests, conquer fears, and discover their untapped potential.

By choosing rock climbing as the first session, Immanuel Adventures aimed to dispel common assumptions about the capabilities of older adults.

We know seniors are full of life and excitement. This programming option is another example of our intense focus on the lifestyle and experiences seniors deserve in their retirement.

The program, created by Rachel Hoeck (Corporate Wellness Manager) and Justin Riesberg (Wellness Manager, Deerfield), was tested at Deerfield (Des Moines, Iowa) in Fiscal Year 23. The next sessions will feature kayaking and hiking in Fiscal Year 24.

Pictured below: Deerfield residents participate in bouldering and top rope climbing at Climb Iowa.





Pictured: Justin Riesberg, Wellness Manager, Deerfield, celebrating with a resident who just finished climbing the wall.



Pictured above and to the right: Chefs preparing appetizers and entrées during the Immanuel Culinary Cup cooking competition.

Culinary Operations

From Excellence to Competition

Immanuel has long been an organization with a reputation for excellence in culinary operations. We have a unique approach to dining because we believe seniors shouldn't have to compromise. We have hired executive chefs, created unique menus, and have daily features and specials. We are unique because not everyone in our industry does that.

To honor the gifts of our talented chefs, we held our first-ever Immanuel Culinary Cup in February. We brought in fourteen of our executive chefs to compete for the honor of being named the top chefs in Immanuel.

Kaz Yezdi (Deerfield, Des Moines) and Bryan Hunter (Newport House, Omaha) won the title, beating out the other six teams from across Lincoln, Omaha, and Des Moines.

Chefs were paired in teams of two and tasked with creating a crab cake appetizer and an entrée of their choice. Chefs Yezdi and Hunter made a winning crab cake paired with three different dipping sauces, along with a surf and turf entrée of ribeye steak, shrimp two ways, and rice. They also threw in a creme brulee dessert for good measure.

"Every chef wants to show their skills, be creative, and share their talents with their community. We have a very competitive group of chefs, and the Culinary Cup was a way for us to celebrate the people who produce some of the best food in our industry every day. It's all about the food, and we know it is the most important part of our residents' and participants' days," says Alan Jarecki, General Manager of Culinary Operations.



In Support of our Communities

\$3,135,000 Returned to Nebraska & Iowa

Throughout the past year, we have remained dedicated to actively engaging with local initiatives, organizations, and projects that address our senior population's unique needs and contribute to our communities' overall welfare. We are thrilled to announce that we have been able to give back a total of \$3,135,000 towards these essential endeavors in Fiscal Year 23.

Since 2015, the Immanuel Vision Foundation has provided financial support to nonprofit, 501(c)(3) organizations whose missions align with our own. In combination with our Immanuel sponsorships, we aim to support the communities we serve.

Vision Foundation: \$2,836,000

Fall 2022-Congregations

- WELCA Water Bottles for the Community in Marshalltown, Iowa
- Old Fashioned Family Carnival in Newman Grove, Nebraska
- Future Bulldogs Child Care Improvements in Ogden, Iowa
- Outdoor Accessibility in Omaha, Nebraska
- Greenhouse Ministry in Alliance, Nebraska

Fall 2022-Agencies & Institutions

- New Cottage at Oaks Indian Mission
- Accessible Kitchens for Mosaic
- Adoption & Post Adoption Programming at Lutheran Family Services
- Health Science Facility at Midland University

Spring 2023-Community

- Bingocize at Aging Resources of Central Iowa
- Urban Farming Internship Program at City Sprouts
- Nolden Gentry Dental Clinic at Dental Connections, Inc.
- Indigenous Health & Community Engagement Project at Dr. Susan La Flesche Picotte Center
- Mobile Closet at Foster Care Closet
- Club de Niños Saludables at Latino Center of the Midlands
- ElderAccessLine[©] at Legal Aid of Nebraska
- Nourishing People, Nurturing the Planet at Saving Grace Perishable Food Rescue
- WhyArts Senior Engagement Programming at WhyArts, Inc.

Immanuel Sponsorships: \$299,000

- Alzheimer's Association (Nebraska & Iowa)
- Omaha Symphony
- Omaha Chamber
- Omaha Community Playhouse
- Omaha BLUEBARN Theatre
- Lauritzen Gardens
- Lincoln Symphony
- Lincoln Chamber of Commerce
- Iowa Western Arts
- Des Moines Symphony
- Des Moines Misc. Organizations

Since its founding, Immanuel has been committed to **serv**ing and **sup**porting the communities in which we operate.

Pushing Immanuel to New Heights

Investing in Programs for the Future

Care Navigation

A hospital stay or skilled care experience can be incredibly overwhelming and complex. The flood of medical jargon, the intricacies of treatment options, and the uncertainty surrounding their condition can leave family members feeling utterly confused and helpless. Balancing emotions of concern and fear with the need to make critical decisions adds to the burden.

Navigating the healthcare system and understanding the diagnosis can be like wandering through a maze without a clear path. During such times, it's helpful to have someone on your side to navigate the transition and coordinate communication with you and your loved ones.

This year, we rolled out Care Navigation in our Omaha communities to address this complex experience. If an independent or assisted living resident in a community enrolls in the program and ends up in the emergency room or hospital, Immanuel's Care Navigator is instantly alerted through a portal established with the hospital systems in the region. If a resident requires a hospital or skilled nursing stay, they will



receive in-person visits from the Care Navigator, both during their stay and for some time afterward, to ensure all follow-up is accomplished and all questions are answered.

Care Navigation is a voluntary program offered to all Immanuel residents in the Omaha and Council Bluffs areas at no cost. The program has had a 90% opt-in rate across all independent and assisted living communities.

Since launching, the Care Navigation team has helped more than 200 residents via in-person, virtual, and phone visits to ensure they and their loved ones understood the plan of care and were prepared for any upcoming transitions.

In Fiscal Year 24, we will deploy Care Navigation to the Des Moines and Lincoln markets.

The Green Initiative

Investing in a green initiative to reduce our company's negative impact on the environment is essential. It is an opportunity to lead by example in today's world.

As the global community increasingly recognizes the urgency of environmental challenges, taking proactive steps to minimize our ecological footprint becomes crucial for both the planet and our business.

By embracing sustainability and adopting eco-friendly practices, we can significantly contribute to mitigating climate change, conserving natural resources, and safeguarding the well-being of future generations.

This past year, we focused on action-oriented steps to bring awareness to recycling and its impact on our ecosystem. Our communities and centers hosted campaigns throughout the year to collect used clothing, eyeglasses, batteries, light bulbs, old cell phones, and print cartridges.

They donated the various items to local non-profits or organizations that recycle these items. The event was a success and helped staff, residents, and participants feel they contributed to reducing our carbon footprint.

Creating awareness of how we can conserve resources is important to our employees, residents, and participants across Nebraska and Iowa.

Living our Mission

Foundation Impact

The Immanuel Community Foundation was formed in 2011 to fulfill our mission and enrich the lives of the residents, participants, and staff who call Immanuel home. Through the generosity of those who live in, work at, or participate in Immanuel's communities and centers, our mission and values are fulfilled through their financial support and self-giving concern for others.

Resident Assistance Fund

The Resident Assistance Fund ensures that residents who face financial hardships, through no fault of their own, can remain a part of the Immanuel family for as long as they desire. Over \$150,000 in financial assistance was provided this year to qualifying residents to subsidize their monthly fees and living expenses.

Helping Hands

The Helping Hands Fund is front and center for Immanuel employees experiencing temporary hardships. Over \$10,500 in bills were paid and 1,580 hours of personal time off were issued so Immanuel teammates could focus on what was most important to them rather than stress about how to pay their bills.

Immanuel Community Foundation Presents

Life-long learning is an essential part of life for Immanuel's residents and participants. The "Presents" series visits all 18 communities and centers four times a year to provide programming ranging from Wildlife Encounters to Quilting Your Legacy, the Omaha Chamber Music Society, and the History of Iowa Baseball. Each program brings enrichment and new knowledge to those who attend.

Student Scholarships

Exemplifying their love for education, residents awarded 54 student workers from seven of



Immanuel's communities \$143,190 in scholarships to higher educational institutions to advance their academics. These scholarships were only possible due to the generosity and leadership of the residents who call Immanuel home.

Community Improvements

Due to the financial generosity of residents, participants, and staff, new patio furniture, sculptures, pianos, landscaping, and stained glass windows were just some of the campus enhancements the Immanuel Community Foundation was able to help bring to fruition.

Celebrating ONE Immanuel

On June 20th, #1 New York Times Bestselling Author Kate Andersen Brower joined nearly 1,000 Immanuel residents, participants, employees, Board members and other supporters at Celebrating ONE Immanuel. With the generous support of Immanuel's business partners, this annual Immanuel Community Foundation event provides an opportunity to lift up the gift of being ONE.

Pictured below: (Far left) The 2023 Celebrating One Immanuel event was a day of songs and smiles as the All-Immanuel Choir performed "John Denver - A Legacy of Song, The Rhythm of Life," a musical tribute to the Grammy Award-winning singer and songwriter. The choir is made up of residents from each Immanuel community, as well as our Home Office.

(Left-center) Employees at Grand Lodge and Deerfield (right-center) received resident-funded scholarships to further their college education.

(Far-right) During the Foundation "Presents" series, Wildlife Encounters visited The Lighthouse campus. Residents got to learn about and interact with a tarantula, lizard, and kangaroo.



Our Progress

Employee and Resident Satisfaction

We value continuous improvement and ensuring the satisfaction of our residents, participants, and employees. That's why we undergo annual surveys, which allow us to understand where we excel and identify areas that require our attention.

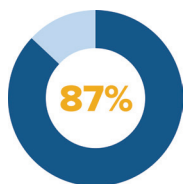
This year's survey results revealed a continuing trend of high satisfaction across our organization. The feedback provided by our residents, participants, and employees has been invaluable in shaping our initiatives and enhancing the overall experience within our communities and centers. With this positive momentum, we will continue to focus on addressing any remaining challenges and building an even better environment for everyone involved.

We compare our results against national averages, and are proud that our results consistently outperform the averages for other organizations across the United States.

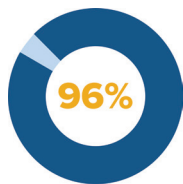
Immanuel's resident, participant, and employee satisfaction remain a high priority, as it drives everything we do. Immanuel has an overall satisfaction rate of 93.5%, far exceeding national benchmarks.

Below, we have shared some of the results we are the most proud of from our resident, participant, and employee satisfaction surveys.

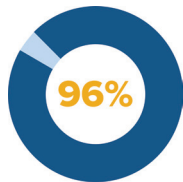
Employee Satisfaction Highlights



87% of employees responded to the survey.

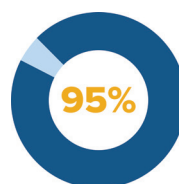


96% of employees agree with the statement that "I feel I belong at Immanuel."

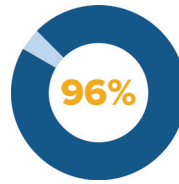


96% of employees agree that Immanuel fulfills our mission.

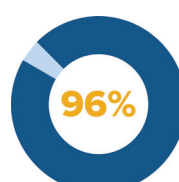
Resident Satisfaction Highlights



95% of independent living residents are satisfied with their experience.



96% of assisted living residents are satisfied with their experience.



96% of PACE participants are satisfied with their experience.

Pictured: Immanuel Home Office employees dressed up as the CHRIST Promises for the annual employee picnic in the park.





Pictured: Carmen Joseph was presented her Serve Award by Eric Gurley during the annual Celebrating One Immanuel event.



Awards of Excellence

Honoring Exceptional Employees

Once a year, we celebrate the best of Immanuel with the Awards of Excellence.

This award program recognizes employees throughout Immanuel who have been exceptional examples of our CHRIST Promises (Compassion, Honor, Relationships, Integrity, Serve, and Teamwork).

Immanuel staff from across the organization submit nominations describing how they have seen their coworkers embody the Promises in their interactions with residents, participants, and staff.

Each Award of Excellence corresponds to one of our six CHRIST Promises.

This year, we received nearly 140 nominations for these six awards.

Recipients are recognized in front of all residents and participants at the annual Celebrating One Immanuel event. Their family members, friends, and coworkers are also invited to celebrate their achievements.

Pictured to the right: Immanuel's 2023 Christ Promises award winners.





Filling a Void

Tabitha Home Health & Hospice Partnership

Following years of collaboration and partnership with Immanuel, in 2021, a local hospice and home health provider in Omaha, Nebraska, sold to a for-profit company overnight.

This significant change left a gap in Omaha's home health and hospice market. Within a week, our team partnered with Tabitha, a Lincoln, Nebraska, based non-profit, to create our own services to fill this crucial gap in the continuum of care in Omaha. Throughout 2021 and 2022, the two organizations partnered to build the structure for the venture, including hiring staff, accreditation, and building the processes for the services.

In April, Tabitha Hospice | A collaboration with Immanuel, received a Gold Seal Accreditation from the Accreditation Commission for Health Care (ACHC.) This gold seal signifies that the venture has completed its Medicare certification survey with an accrediting body and gives full accreditation for a three-year cycle.

“Our Tabitha and Immanuel collaboration team is honored and grateful to receive hospice accreditation through ACHC,” said Bridget Caniglia, Administrator of Tabitha Hospice & Home Health Care | A Collaboration with Immanuel.

“These services provide life-affirming care that gives clients respect, dignity, and choice in their end-of-life journey. Being able to meet clients wherever they call home offers a familiar environment to live out the rest of their days comfortably and with the ability to continue making memories with their loved ones.”

This achievement represents the exceptional quality and value that Tabitha Hospice offers to its clients and their families. Receiving accreditation not only means that the service meets and exceeds standards for quality of care but also recognizes the compassion, commitment, and excellence exhibited by team.

“Immanuel and Tabitha have a long history of partnership in serving the seniors within our communities,” said Eric Gurley, President and CEO of Immanuel. “Tabitha’s expertise will join with Immanuel’s strong reputation in meeting the needs of seniors and their families while filling gaps in the continuum of care needed in life’s journey.”

Since starting the collaboration, we have served ninety seniors in their hospice journey. We have additional plans to provide home health care through this partnership.



A Love of Adventure

Immanuel Explorers

In October, the Immanuel Explorers went to northwest Arkansas. The group comprised 36 resident explorers, four Immanuel employees, one travel company tour guide, and one bus driver.

The Explorers toured through the original store owned by Sam Walton and the Walmart Museum, which features a history of the Walton family, the building of his corporation, and his Presidential Medal of Freedom, awarded in 1992 by President George H.W. Bush.

Next, the group spent hours walking through the indoor and outdoor art exhibits featured at the incomparable Crystal Bridges Museum of American Art. This museum sits on 120 acres in the Ozarks, with outdoor art displays throughout its impressive network of trails. The building was designed by world-renowned architect Moshe

Safdie, who took inspiration from the nearby natural springs and scenery.

The Explorers then enjoyed a day trip to Eureka Springs, where they took a guided tram tour of the Turpentine Creek Wildlife Sanctuary. This impressive organization focuses on the rehabilitation and lifelong care of big cats, including tigers, leopards, and lions, and hosts a few grizzly bears. Later in the trip, travelers participated in a presentation and tour of the beautiful Thorncrown Chapel in the Ozark Forest. This was a picturesque location where they enjoyed the foliage and the serene environment.

The Arkansas/Missouri Dinner Train took the group on an exciting adventure into the Ozark Forest. The journey - through the mountain range to the river basin - showcased the region's beautiful fall foliage and historic bridges.



The group enjoyed a comprehensive tour of Brightwater, a culinary school with a prestigious reputation that houses vertical gardens for fresh herbs and an impressive teaching kitchen. Travelers experienced a custom, chef-created menu at the school, which features several James Beard Award-winning chefs on staff.

All explorers were gifted Immanuel-branded travel pillows and bags to aid in the comfort of the bus trip. Upon return, each traveler received a photo book to commemorate the special moments from their time together.

The dining experiences were delightful, friendships were created, and we look forward to the next trip: October 3-9, 2023, to San Antonio, Waco, and Oklahoma City!

The Immanuel Explorers take an annual trip somewhere in the United States. Past trips have included Nashville, Alaska, Kansas City, and more. The trip is open to all residents across all communities.

Pictured below: (Left) Explorers board the open-air tram along the guided tour of the Turpentine Creek Wildlife Refuge in Eureka Springs. Travelers learned the animals' backstories and information about big cats and conservation.

(Center) The Bentonville Chamber of Commerce greeted our group as we arrived at the Wal-Mart Museum and welcomed us to northwest Arkansas. Explorers are pictured standing in front of the original five-and-dime store owned by Sam Walton.

(Right) Designed by E. Fay Jones and opened in 1980, the Thorncrown Chapel is nestled in the Ozark Forest. The chapel was the dream of Jim Reed, a native of the area who wanted to honor the beauty of God's creation and create a special place for worship and reflection.



A Look at our Health

Financial Updates and Highlights

The financial health of our organization is truly one of our differentiating factors. Unlike many in the industry across the country, Immanuel has remained steadfast in building a strong financial structure to secure our future for another 135 years. With that financial stability comes a responsibility to be good stewards of those resources and use them to impact our seniors, communities, and employees meaningfully.

Throughout this report, you have read about our commitment to capital improvements to our campuses through expanding existing buildings and renovating apartments and shared spaces. You have also read about our desire to innovate in the industry through our Bloom at Lakeside project in Omaha, Nebraska.

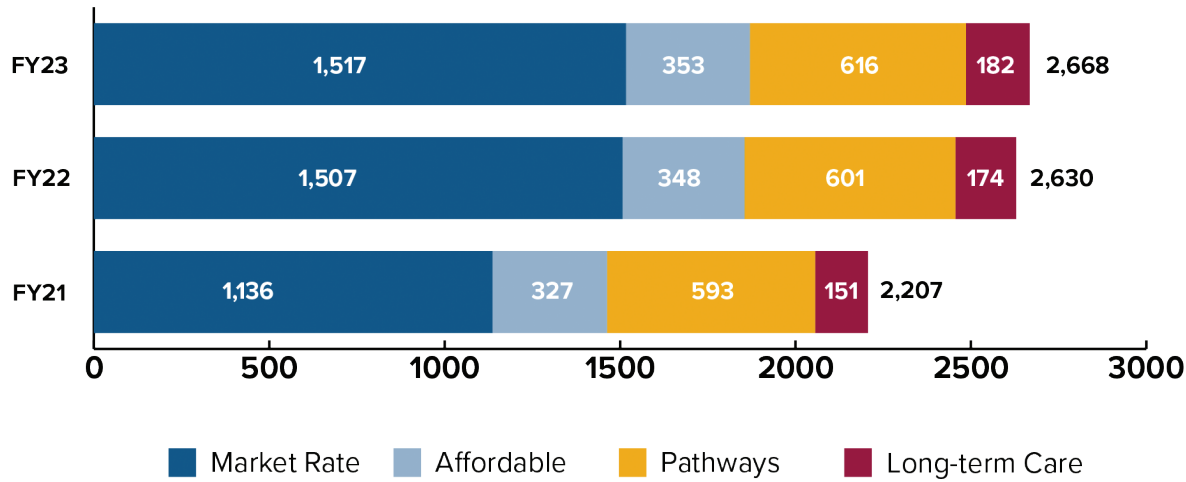
In addition to those recurring initiatives, in Fiscal Year 23, we focused on three main objectives, listed below. These focus areas drive our ability to retain staff, diversify our revenues to withstand market changes, and provide services that meet the needs of our markets.

Whom We Will Serve

While Immanuel is known for providing the continuum of care in retirement living and senior care, we also provide those services to the entire wealth continuum. In Fiscal Year 23, we saw growth in all business lines, including market-rate communities, affordable communities, Pathways (PACE®), and long-term care. The diversity in service lines is critical in ensuring our ability to respond to the needs of seniors across the wealth continuum in our service area while protecting our financial stability from the ebbs and flows of the market.



Figure 1.0: Lives Served by Business Line FY23



Today, we proudly serve 2,668 lives throughout our communities and centers. Please see Figure 1.0 for a visual of the lives served by business line.

Who We Will Employ - Employer of Choice

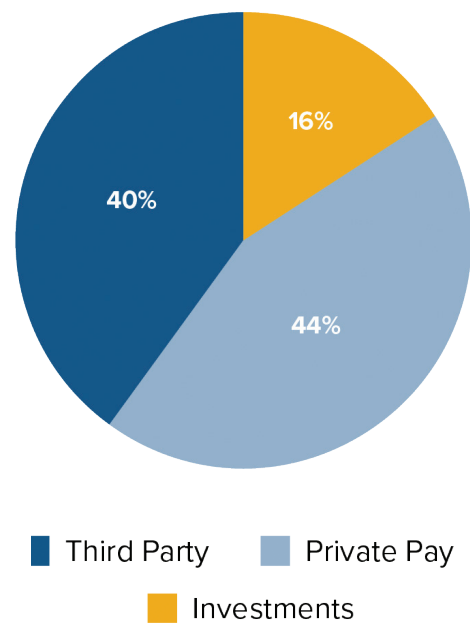
Another focus area for Fiscal Year 23 was ensuring Immanuel is positioned as an employer of choice, from our benefits to competitive compensation. In addition to focusing on the successful onboarding of new employees through implementing the Day One initiative (see page 18), we also ensured we were paying a competitive wage to our employees across Nebraska and Iowa.

These investments created a staggering reduction in full-time employee turnover of 20.7% from Fiscal Year 22 to Fiscal Year 23.

Where the Funding Will Come From

Finally, as the world departed from the Corona Virus pandemic, we focused on ensuring a healthy balance in revenue sources. This balance allows Immanuel to succeed in providing market-rate retirement options while funding the missional side of the organization responsibly. Please see Figure 2.0 for a visual of our revenue mix for Fiscal Year 23.

Figure 2.0: Revenue Mix FY23





Pictured: Residents from Lakeside got to tee it up at Top Golf to celebrate Senior Health and Fitness Day.



Fiscal Year 24

A Look at Our Focus for Next Year

As we conclude this year's annual report, we are excited to present the roadmap of strategic initiatives that will drive our organization's growth and impact during the upcoming year. These initiatives embody our commitment to innovation, community development, and excellence in service delivery.

1. Developing a master plan for the Trinity

Campus in Papillion, Nebraska: Our primary objective is to create a comprehensive master plan for the Trinity campus. This strategic undertaking will lay the foundation for future expansion and improved amenities, enabling us to provide even better care and services to the community we serve.

2. Lighthouse on the Lakeside Campus, A

Phased Plan for Transformation: We have completed plans for a new 18-bed household at The Lighthouse that will begin construction this fall. Following construction, we are developing plans for a thoughtful, phased renovation of the existing two households.

3. Affordable Housing Site Selection in Lincoln

or Des Moines: Affordable housing remains a critical concern in our communities. To address this, we are diligently working to identify the ideal location for an affordable housing development in either Lincoln or Des Moines. This initiative underscores our commitment to positively impacting the lives of those we serve.

4. Expansion of Care Navigation to Lincoln and

Des Moines: Care Navigation has proven to be a transformative service in our organization. We are thrilled to announce its expansion to Lincoln and Des Moines.

5. Implementing the Dyad Model Structure

in PACE Centers: In our quest for continuous improvement, we will introduce the Dyad model structure in our PACE centers. This integration will foster collaboration and synergy between the three centers, driving enhanced clinical quality and comprehensive care for our participants.

6. Developing a New Immanuel Website and

Creating a Brand Identity and Communication Strategy: We understand the importance of effective communication and representation in today's digital landscape. We will redevelop our new website to better assist seniors and families in evaluating our communities and centers, and introduce a refreshed brand identity with a comprehensive communication strategy to engage our employees.

As we embark on these strategic initiatives, we extend our gratitude to our dedicated team, partners, and community members who make our work possible. Together, we will shape a brighter future, enriching lives and making a meaningful difference in the lives of seniors across Nebraska and Iowa.

Recognizing Leadership

Our Boards of Directors

Immanuel Board of Directors

- Cynthia A. Alloway**, Retired, CHI Health
- Rev. E. Jon Benson**, Saint John Lutheran Church
- Brenda Bergman-Evans, Ph.D.**, Retired, CHI Health
- Steven R. Bullock**, OpenBook Pharmacy & Perfect Rx
- Randal J. Burns**, Foundation First Corporation
- Dan R. Friedlund**, Retired, Immanuel
- George A. Grieb**, Retired, Creighton University
- Kristen L. Hoffman, M.D.**, Retired, Methodist Physicians Clinic
- Scott J. Howerter**, North Channel Capital
- Bishop Scott A. Johnson**, Nebraska Synod ELCA
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- Dan R. Friedlund**, Retired, Immanuel
- Rev. Timothy M. Koester**, Saint Michael Lutheran Church
- Delight Wreed Byrd**, Retired, Bellevue University



Rev. E. Jon Benson, Saint John Lutheran Church

Randal J. Burns, Foundation First Corporation

Rev. Kathryn K. Gerking, St. Timothy's Lutheran Church

Kristen L. Hoffman, M.D., Retired, Methodist Physicians Clinic

Guillermo "Bill" Huerta, M.D., Methodist Health System

Bishop Scott A. Johnson, Nebraska Synod ELCA

Mary J. Parker, Eastern Nebraska Office on Aging

Jill M. Powers, Retired, CHI Health

Immanuel Vision Foundation Board of Directors

A Message of Thanks

The Immanuel Board of Directors, Affordable Board of Directors, and Immanuel Vision Foundation Board of Directors are comprised of volunteers representing some of the largest organizations in Nebraska and Iowa.

They are passionate professionals who provide Immanuel with critical intellectual capital and strategic resources. Their impact strengthens our communities and centers, and we thank them for the countless hours they donate to our organization.



Immanuel
 Here for you. *Not for profit.*



Affiliated with the Nebraska Synod, Evangelical Lutheran Church in America