



CAMPAIGN PROSPECTUS | 2016-2017

**More  
than Bricks**

Building New Spaces • Touching More Lives



Bartels Mission Statement  
*Enriching lives through  
quality services and  
Christian care*

## Board of Directors



Paula Geise  
*Chair*



Pam Brickman  
*Vice-Chair*



Mike Litterer  
*Treasurer/Secretary*



Dr. Ann Rathe  
*Past Chair*



Rev. Mark Anderson



Bob Brunkhorst



Rich Carlson



Steve Egli



JoAn Headington



# Bartels Lutheran Retirement Community Serving Since 1954

For more than 60 years, Bartels Lutheran Retirement Community has provided high-quality care to thousands of seniors and has evolved from a “home for the aged” to a multilevel retirement community. Over these years, Bartels has responded to the changing health care needs of seniors and a preference for varied retirement living services, growing to serve more than 250 residents through a continuum of care on a 20-acre campus.

Responding to current needs in senior care and preference for services remains a priority for Bartels leadership as we serve the residents of the greater Waverly area.

With our Christian-based mission and “residents first” philosophy, Bartels gives residents peace of mind knowing they can move to a higher level of care when needed without having to leave the community they call home. Support services include a full-time chaplaincy program, music therapy, social work support, nutrition services, therapy services, housekeeping/laundry, maintenance, transportation, beauty/barber shop, weekly banking service and a full schedule of activities.

**5 million people live  
with Alzheimer’s or  
dementia.**

## Bartels Memorial Foundation Trustees



Back row: Ryan Rasmussen, Bill Hamm, Bob Brunkhorst, Jan Striepe  
Front row: Julie Lindaman, JoAn Headington, (Chair) Not pictured: Keith Collins

# Premier Senior Care

*"You took care of our mom like she was your mom. Thank you!"*

It's perhaps the best compliment we've ever received—and a reminder for us every day that, when staying in their own home is no longer possible, so many beloved seniors make Bartels Lutheran Retirement Community home.

Leaving the comfort and security of home may never be easy, but Bartels is committed to making senior care feel as much like home as possible.

We're listening to our residents and families who want to improve senior care services with private rooms, continued access to therapy for former short-term residents and memory care for those experiencing early dementia.

It's an exciting time at Bartels.

As more and more seniors seek individualized care for their unique preferences and medical needs, we're responding to deliver that high-quality and specialized service. Bartels is embarking on a series of facility renovations and new construction to provide comfortable, home-style environments for both short-term and long-term residents, increased space for treatments and recovery and extended access to high-quality care for more seniors.

**22% of caregivers say their loved one has Alzheimer's.**

The campaign for Bartels is more than just constructing new spaces. When these phases are completed, Bartels will be the region's premier facility for senior care.

For more than 60 years, Bartels has worked diligently to blend home and health care for seniors in the Waverly area. Tending to the needs of aging adults has always been our responsibility—and one taken seriously. Born from a charitable gift in 1954 to provide elder care in the community, Bartels' focus has been steadfast. While healthcare has changed over the last half-century, Bartels continues to rely on financial support from those who are passionate about providing the best care for our seniors, now and in the future.

*You are invited to join in continuing a legacy of elevated senior care - because, at Bartels, we care for moms and dads like they are our own.*

## A Quality of Life and Economic Impact in the Greater Waverly Area

Bartels Lutheran Retirement Community is a vital part of the greater Waverly area, not only because of its economic impact but also because of quality of life factors for families of the region. Because of the "continuum of care" for residents of Bartels, families have the comfort of knowing that they and their loved ones will be able to continue to live in the community throughout their lives and experience Bartels high level of care as they require services.

The economic impact is significant. Bartels employs more than 200 persons from Waverly and surrounding communities and generates more than \$6 million in annual salaries. Each year, Bartels purchases approximately \$2 million in local goods and services. These include construction, automotive, utility and pharmaceutical services. In addition, many other industries and services are engaged on a daily basis including: oxygen suppliers, physical therapy, occupational therapy, medical doctors, consultants, hospitals, labs, clinics, dental services, food vendors, beauticians, electricians, and plumbers.



*"None of us really think of ourselves as growing old and feeble and everyone wants to stay home as long as possible. But when that time comes where they can't, we want it to be the best it can possibly be."*

**DEB SCHROEDER**



*"...we are comfortable knowing that she's being taken care of. I can go to work and I can sleep at night and not have to worry about what's happening to Mom."*

**CINDY WEST**



*"I'm on board with this memory care concept. And the studies are showing that too, that some of the amenities that are in there, in this memory care unit have been proven to help prolong Alzheimer's patients' lives."*

**KRIS BRUNKHORST**



# More Than Bricks - Building New Spaces, Touching More Lives

Choices are abundant in senior care, and sometimes they're difficult ones to make. Bartels aims to be the premier retirement community of choice: providing first-rate facilities, highly skilled nursing care and a close-knit community for seniors—making the decision about selecting a retirement community easier for families and residents. The **More Than Bricks Campaign** will expand Bartels services and respond to preferences in elder care supports.

Common Resident New Resident Existing/Remodel

## I. Aspen Cottage, Assisted Memory Care

The transition into memory loss is typically a gradual one. Many seniors with early dementia are able to maintain a largely self-sufficient lifestyle with minor levels of support. Providing specialized space and care to seniors experiencing memory loss, or early stages of dementia or Alzheimer's disease, will ensure supports are in place for the highest level of independence possible. The need for this addition to the Bartels Lutheran Retirement Community is widely felt by area families and current Bartels residents.

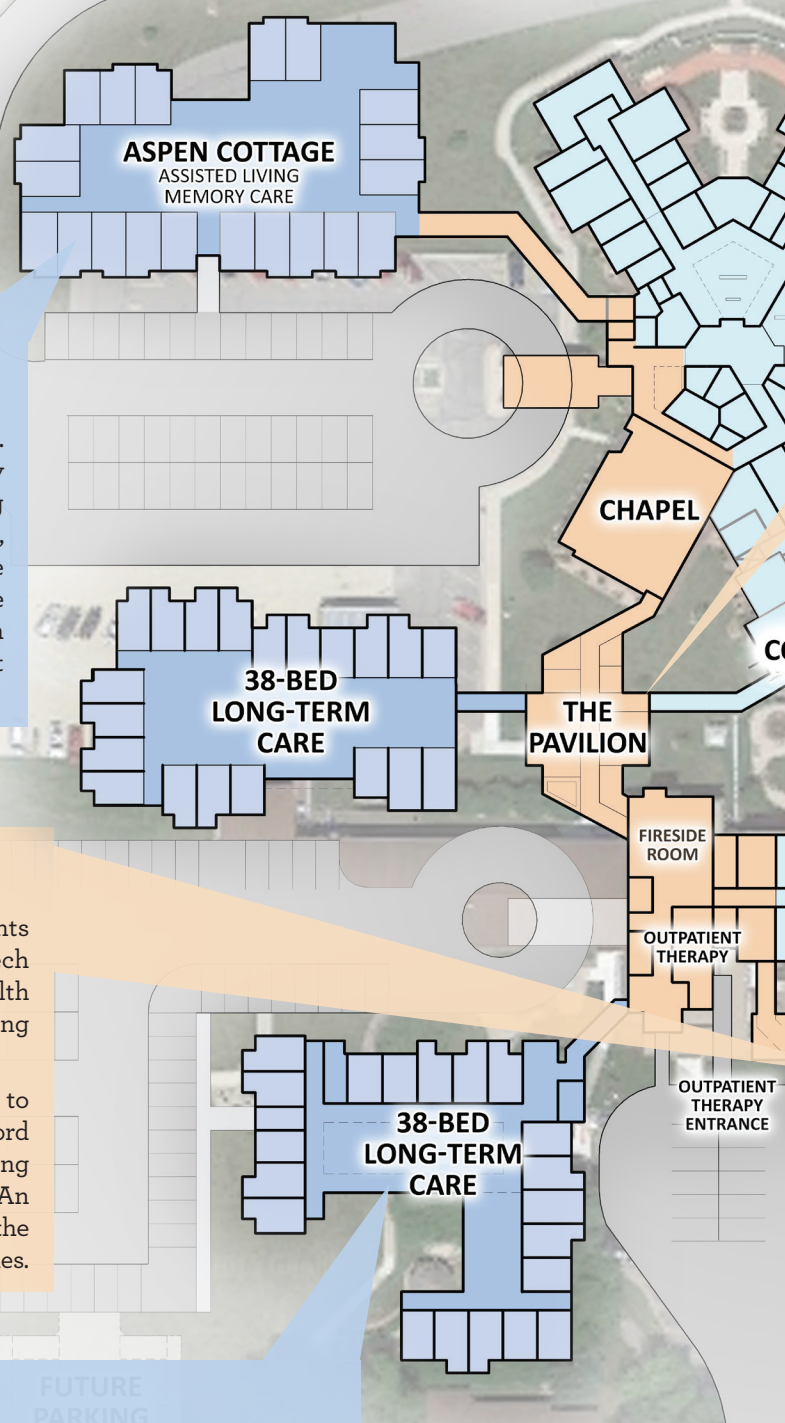
## II. Wellness Center and Therapy Pool

In recent years, it has been observed that short-term residents receiving skilled care such as physical, occupational or speech therapy following a stroke, heart attack, surgery or other health conditions often lose this service when they return home, causing a lapse in care at a precarious time.

To bridge this care between residences, plans are underway to expand the wellness center and add a therapy pool which will afford increased space to extend service to Bartels residents continuing their rehabilitation in their own homes or alternative setting. An expanded facility to meet this need can also offer seniors in the greater Waverly area a new option for exercise and wellness activities.

## III. Household-Style Units

Traditionally, one of the biggest resistances to retirement community living is moving out of one's home. As seniors move to retirement communities at later ages, requests for private residences has increased. Two household-style care units will be constructed to offer individual living space and private bathrooms for each resident, while maintaining our current service licensure level.

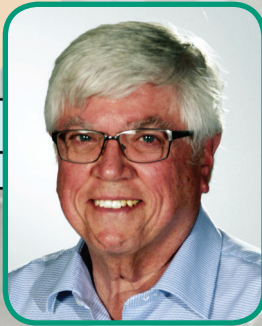


The number of seniors is growing. In 2014 there were 1,000 residents. By 2040 there will be 1,500 residents.

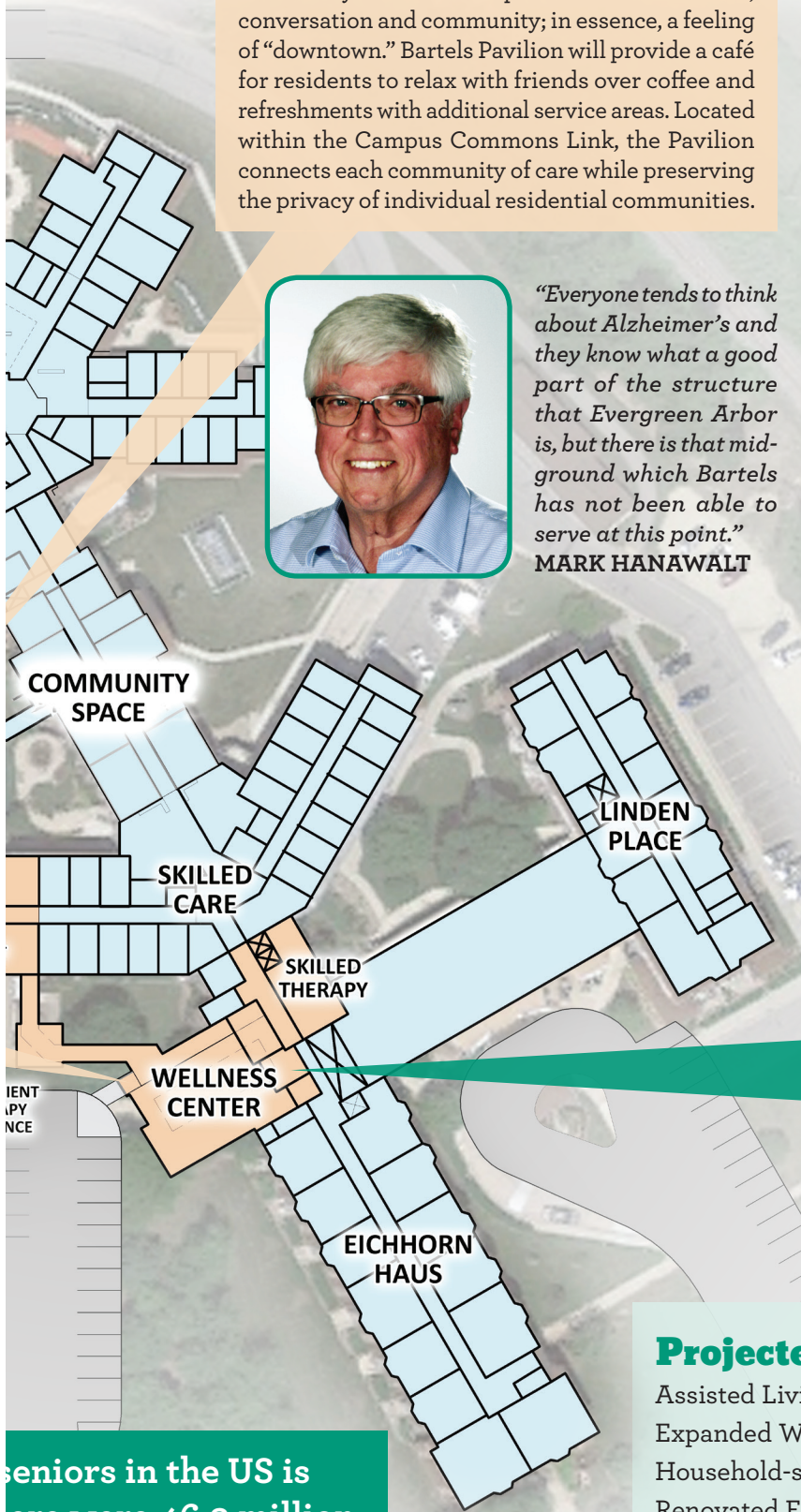


## IV. Pavilion

Every neighborhood needs space for gathering with family and friends—spaces for entertainment, conversation and community; in essence, a feeling of “downtown.” Bartels Pavilion will provide a café for residents to relax with friends over coffee and refreshments with additional service areas. Located within the Campus Commons Link, the Pavilion connects each community of care while preserving the privacy of individual residential communities.

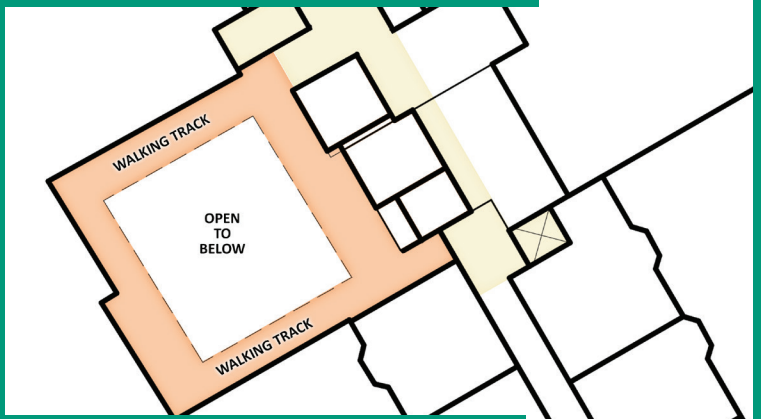


*“Everyone tends to think about Alzheimer’s and they know what a good part of the structure that Evergreen Arbor is, but there is that mid-ground which Bartels has not been able to serve at this point.”*  
**MARK HANAWALT**



seniors in the US is  
 ere were 46.2 million,  
 ill be 82.3 million.”

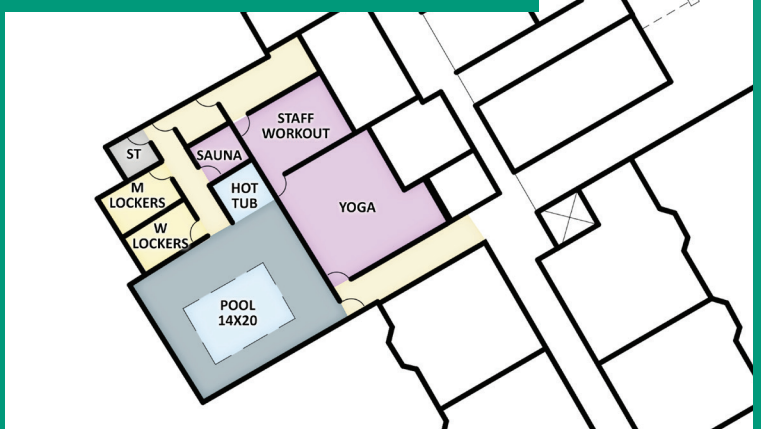
### Wellness Center - Upper Level



### Wellness Center - Main Level



### Wellness Center - Lower Level



### Projected Costs

Assisted Living Memory Care .....	\$ 3,500,000
Expanded Wellness Center & Therapy Pool .....	\$ 2,000,000
Household-style Long Term Care Units .....	\$12,000,000
Renovated Existing Facilities .....	\$ 4,500,000
Pavilion .....	\$ 1,000,000
<b>Total.....</b>	<b>\$23,000,000</b>



# The “More Than Bricks” Campaign - Goal \$3.5 million

The Board of Directors has authorized a capital campaign, “More Than Bricks,” to provide the needed funding to leverage other funding sources. With the attainment of the \$3.5 million campaign goal, all projects as presented in this document can be completed by 2025 or before.

Projects will be completed in the order listed below:

- Assisted Living/Memory Care (Beginning in 2017)
- Wellness/Therapy Center
- New Long Term Care Units To Replace Current Facilities
- Pavilion

## Funding the Projects

To meet the funding needs of this effort, financial support is anticipated from the following sources:

Secured Financing	\$15,000,000
Organizational Resources	\$3,000,000
Project Directed Estate Gifts In Hand	\$1,500,000
More Than Bricks Campaign	\$3,500,000
<b>Total</b>	<b>\$23,000,000</b>



*“We need to make sure that we’re looking at our clientele, future clientele and make sure they want to be sure they have all the amenities and that’s what we’re striving for.”*  
**BOB BRUNKHORST**

**By 2030, 8.7 million Americans will be 85 years old or older.**

Contributions are sought in the form of cash, marketable securities, land or other assets that can be readily converted to cash. If you would like to make a non-cash gift, please contact Barb Bridges, Vice President of Marketing & Development, for transfer and broker information.

Gifts will be received from individuals, families, businesses, organizations, foundations and congregations. Supporters of Bartels are invited to respond, as able, with a three-year commitment to this effort (2016 - 2019). However, gifts extending beyond 2019 are certainly welcome, as are one-time contributions and gifts made over a shorter timeframe.

Many “naming” and memorial/honor gifting opportunities are available in this project. These opportunities are available to all contributors (families, businesses, organizations, foundations, congregations, etc.). A full listing appears on the back cover of this document. Please contact the campaign office to discuss these opportunities.

## Standard of Gifts

In order to fully fund a \$3.5 million campaign goal, the following gifts and suggested quantities will be needed:

	Amount	Cumulative Total
1 gift	\$500,000 or more	\$500,000
2 gifts	\$250,000	\$1,000,000
4 gifts	\$150,000	\$1,600,000
5 gifts	\$100,000	\$2,100,000
10 gifts	\$50,000	\$2,600,000
12 gifts	\$25,000	\$2,900,000
20 gifts	\$10,000	\$3,100,000
30 gifts	\$5,000	\$3,250,000
50 gifts	\$3,000	\$3,400,000
Many More Gifts of Lesser Amounts		\$3,500,000



*“There are many ambitious goals within this project. We believe quality of life is going to be enhanced with each one.”*  
**DEB SCHROEDER**



# Campaign Steering Team



Bob and Kris Brunkhorst  
Campaign Co-chairs



Mark Hanawalt  
Chair for Major Gifts



JoAn Headington  
Chair for Board/  
Trustees Gifts



Chelsea Petersen  
Co-chair for  
Employee Gifts



LeeAnn Doty  
Co-chair for  
Employee Gifts



Duane and Diane Harms  
Co-chairs for  
Resident/Family Gifts



Dr. Ann Rathe  
Chair for Medical  
Professionals Gifts



Ryan Rasmussen  
Chair for  
Business Gifts



Christy Steiert  
Chair for  
Community Gifts



Rev. Mark Anderson  
Chair for  
Congregation Gifts

# Campaign Staff



Deb Schroeder  
President and CEO



Barb Bridges  
VP of Marketing  
and Development



Corrie Ramige  
Development Associate

By 2025, 74,000 Iowans will be diagnosed with Alzheimer's or dementia.



Building New Spaces • Touching More Lives



*"The bricks, they will be important, but the community that is formed within those bricks will define us."*  
**CHUCK INFELT**



*"I think we need to give back and support the campaign in any way we can, because Bartels is going to be there for so many, our loved ones, and someday, maybe us."*  
**PATSY CARNEY**



# Naming And Memorial Opportunities

## Assisted Living Memory Care

Name the Building . . . . . Claimed	Resident Dining Room . . . \$30,000	Entry . . . . . \$25,000
Family Room . . . . . Claimed	Porch . . . . . \$25,000	Resident Room (20) . \$10,000 each
Great Room . . . . . Claimed	Terrace . . . . . Claimed	Spa . . . . . \$15,000

## Wellness Center

Name the Building . . . \$500,000	Walking Track . . . . . \$50,000	Locker Room (2) . . \$25,000 each
Pool . . . . . \$200,000	Fitness Room . . . . . \$50,000	Hot Tub . . . . . \$25,000
Exercise Room . . . . . \$100,000	Smoothie Shop . . . . . \$25,000	Sauna . . . . . \$15,000

## Long Term Care

Name the Building (2) . . . . . \$500,000 each	Terrace (2) . . . . . \$25,000 each
Each Floor (4) . . . . . \$250,000 each	Sun Room (2) . . . . . \$25,000 each
Great Room (4) . . . . . \$50,000 each	Entry Main Level (2) . . . . . \$25,000 each
Family Dining Room (4) . . . . . \$50,000 each	Spa (4) . . . . . \$15,000 each
Resident Dining/Kitchen (4) . . . . . \$30,000 each	Resident Room (76) . . . . . \$10,000 each
Porch (2) . . . . . \$25,000 each	

## Pavilion

Name the Building . . . . . \$200,000	Community Room . . . . . \$50,000
Pub . . . . . \$100,000	Coffee Cafe . . . . . \$25,000



1922 5th Ave NW  
 Waverly, IA 50677  
 (319) 352-4540  
[www.bartelscommunity.org](http://www.bartelscommunity.org)  
[www.morethanbricks.org](http://www.morethanbricks.org)