



ST. JOHN'S
LITURGICAL MINISTRIES
SPRING 2018 ISSUE

THE WISE ADAPT THEMSELVES TO
CIRCUMSTANCES, AS WATER MOLDS
ITSELF TO THE VESSEL.

CHINESE PROVERB

ECHOES

UNDER THE RIMS

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Abiding and Adapting



Tom Schlotterback
VP OF MISSION ADVANCEMENT

Welcome to ECHOES – Under the Rims, inclusive of a refresh to look and feel. Stories inside this first volume of 2018 share a common theme of shaping the future in the midst of change. Within the lead story our President and CEO, David Trost, tells of emerging realities now prompting St. John's to consider adaptive approaches for providing human services into the 21st Century. A second story introduces adjustments underway within Lutheran Social Services of Montana, including the new leadership presence of Trudi Paulson.

A congratulatory spotlight also illumines the distinguished work of Diana Tolsted, birthparent counselor, who recently

received recognition within the U.S. Congressional record. A third story adds to previous introduction about the investment St. John's is making in matters of volunteer enlistment and coordination. With the U.S. Congress adopting changes to Tax Law at the end of 2017, people are wondering what these changes may mean. The fourth story surfaces some realities to be aware of in relation to philanthropy. Finally, the last story celebrates the 20th anniversary of Mission Ridge, which is a shining example of St. John's historic capacity to adapt and collaborate. For 54 years, St. John's has a storied history of being thoughtful, nimble and adaptive while abiding in a beloved mission to provide living opportunities within nurturing environments of hope, dignity and love. Abiding and adapting mutually embrace at St. John's so that it remains a ministry context where every day, for every age, there is healing, meaning and purpose.



SHAPING THE FUTURE

*The wise adapt themselves to circumstances,
as water molds itself to the vessel.
Chinese Proverb*

Change is constant and adapting to change is often no easy task. More than fifty years ago, realizing an unfulfilled need in the Billings community, a group of Lutherans changed the landscape of the community by building St. John's Lutheran Home. The landscape of service to seniors in Billings was changed forever and for the better! Over thirty years later, we answered another call for independent senior living by adding Mission Ridge, a perfect example of the St. John's mission directing expansion that meets the ever-changing needs of a community.

Beyond the bricks and mortar, St. John's has quietly met other community needs over time by leading the way in employee-based childcare, offering sustainability for faith based non-profit adoption services, responding to natural disasters, and providing mental health resources and physical rehabilitation for all ages.

Preparing to enter the third decade of the 21st Century is no small task when it comes to living out the mission of providing living opportunities within nurturing environments of hope, dignity and love. St. John's management and board leadership are thoughtfully

engaged in a repositioning process and conversation about how to be a regional leader in providing social ministry and services. We asked President and CEO David Trost to share some thoughts with readers:

In the constant of change, what signs are you seeing that now require St. John's to adapt to meet the future?

meeting the changing demands of consumers in the baby boomer generation.

The changing nature of social services funding means that we need to become less reliant on government resources to fund our day-to-day operations. It means we have to be more thoughtful about what we spend. Ultimately, as we still need the same resources to deliver on our mission, we must be more creative about how to raise funds through philanthropic efforts.

The second and third challenges go hand-in-hand. As our West End campus has expanded physically, the oldest structures are showing their age inside and

DT: The three things that most affect St. John's ability to live out our mission are the changing priorities in public funding for social services, our aging infrastructure that serves current senior population, and

out. We find ourselves faced with decisions about whether to refurbish the original structures or to think more strategically about the type of structure that will best meet the demands of future consumers.

Speaking of consumers, what are you learning about how seniors will think and respond to growing older in the next 10-15 years?

how that might happen. When desires turn to "needs and dependence," they will expect compassion and understanding for their individualism. At St. John's, we have an opportunity to be innovative in our approach to meeting those desires.

Fundamentally, I believe the same is true for all generations down through the millennials. The difference may be the sheer number of boomers with the power to mandate change from institution to individualism.

What is your vision for St. John's in meeting the needs of those we serve in Montana, today and in the future?

adapt. Our Board of Directors recently developed a vision statement that keeps us focused: *St. John's is a place where every day, for every age, there is healing, meaning and purpose.*

DT: That really is a question for each boomer. As a generation, they were raised to think as individuals. They are each unique with diverse backgrounds and varying resources. These adults, many of whom don't care for the term "senior," will "desire" to retire and live free of others dictating



St. John's is a place where every day, for every age, there is healing, meaning and purpose.

As we meet the future, St. John's leadership will remain faithful to its mission. The mission tells us what to do; our vision is what we hope to realize as a result. We cannot provide all services to all people, yet we can refine the sustainable services at which we excel and serve as many as possible. To that end, we will have to work harder than ever to build our reserves through charitable gifts in order to offer equitable services to those who have exhausted their resources. We are all God's children, blessed with different experiences, talents and resources. We share those blessings with each other to create a great community.

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JOINING HEARTS IN HOPE

Adapting to the call to serve takes all forms and St. John's answered the call sixteen years ago by offering welcome to Lutheran Social Services of Montana, further diversifying the mission of providing love to all. The adoption program has been the cornerstone of LSS of MT for over 60 years and remains so today. Throughout the decades, over 700 children have found permanent homes through adoption and many more birthmothers and their loved ones have benefited from support and education provided by experienced counseling staff utilizing best practice services. The professional staff covers the state of Montana offering birthparent counseling, adoption and foster care services with the goal of joining hearts in hope. In addition to this core program, LSS of MT has responded to the needs of Montanans by offering services such as prison & hospital chaplaincy, refugee resettlement, disaster relief, and mental health counseling.

Continuing to provide living opportunities within nurturing environments of hope, dignity and love, the organization has responded to the growing needs of our community with the hiring of Trudi Paulson, LCSW, as Director of Family Services. In addition to supporting the birthparent/adoption program, Trudi will expand the counseling program with the focus on supporting staff and their families, the elders of our community, as well as, the members of the adoption triad.



Trudi Paulson, LCSW
DIRECTOR OF FAMILY SERVICES

Trudi received her master's degree in social work in 1997 and has provided counseling, education and support to individuals, families and groups in a variety of settings ranging from public schools to in-home services to long term care. Most recently, she was instrumental in helping to develop the Senior Independence Hospice program at St. John's.

Under Trudi's leadership, the licensed clinical social workers of LSS now offer Employee Assistance Program (EAP) to employees and their families. One of St. John's strengths as an employer is the "sense of family" that encompasses daily work and the variety of supportive services offered to employees. However, employees often feel stretched thin and stressed out. National research on workplace issues indicates that 20-45% of employees struggle with personal, home and/or work issues which impacts work performances.

EAP provides confidential short term counseling, referral and follow up services to enhance personal and professional well-being. There is no cost for EAP services and if care beyond the EAP is indicated, the counselor will work with clients to explore options. By offering EAP services on campus, employees now have the option of scheduling a time and location which is convenient for their work schedules. The experienced, compassionate staff of LSS will help employees work through their concerns with the goal to find healing, meaning & purpose within their work, their life and their family.

Diana Tolsted, LSS of MT birthparent counselor and Wendy's Wonderful Kids recruiter has received recognition in the Congressional Record as Montanan of the Week by Senator Steve Daines. The proclamation reads as follows:

"Mr. President, during National Adoption Awareness Month, I have the distinct honor of recognizing Diana Tolsted of Billings. For nearly three decades she has been helping people navigate all aspects of the adoption process. She has made a positive and lasting impact in the lives of many Montanans.

Through her work with Lutheran Social Services of Montana, Diana has gently guided and counseled adoptees, birth parents and adoptive families. For a dozen years, she has been a recruiter with Wendy's Wonderful Kids, leading a program dedicated to finding adoptive families for the longest waiting children in foster care from eastern Montana.

Throughout the United States, there are over one hundred thousand children in foster care who are waiting for adoption, each needing a loving home and stable environment to allow them to thrive and reach their potential. In the midst of this adoption challenge, folks like Diana are a guiding light to help others traverse adoption obstacles. I would like to thank Diana for having a heart as big as Yellowstone County, and a commitment to brightening the hopes of children, one life at a time."

Congratulations, Diana, for the amazing gifts that you bring to the children of Montana!



ENHANCING LIVES *through Volunteerism*



Since the beginning, St. John's has been supported by faithful volunteers, starting with groups of Key Ladies from our Corporate Churches under the expert hand of Shelly Hoovestal, Activities Director. One of the many Key Ladies who have kept our residents supported is Cleo Koefeld, who has been volunteering with us for decades. Cleo speaks of her volunteer experience, "One person can't do it all. It's the other ladies that make it possible. Everybody has something to offer."

It's difficult to quantify all of the good that has taken place over the years, so many have been quietly doing good works, seeking no recognition other than to touch the lives of our elders in a positive way. From birthday parties to bingo, visitation to mending, baking and shopping, volunteers have made an impact. The positive impact of volunteering also extends to the volunteer. Cleo remembers one special instance where she received a beloved quilt that was so worn squares were coming apart. She asked to take it home so she could spend a little extra time trying to come up with a way to repair the piece without dismantling it entirely. She was able to replace the worn piece and after returning it to the elder, was surprised to learn that they were overjoyed to have their quilt back and couldn't even find the repair. "Volunteering is not a job," Cleo says, "it's a joy. Visiting with the people just makes you feel good."

On March 1st we launched our new volunteer website, online application process, and orientation along with many new and exciting volunteer opportunities. As we begin this new phase, Cleo points out, "Many of us are not going to be able to do this much longer." In order to continue to live out our mission, we will need more volunteers from all walks of life to continue providing living opportunities with nurturing environments of hope, dignity and love.

"Life is about other people," says Cleo.

"Give all you can to your work, your marriage, and your volunteer work. If everyone felt that way it would be amazing."

"Life is about other people," says Cleo. "Give all you can to your work, your marriage, and your volunteer work. If everyone felt that way it would be amazing." As we move into spring, we invite you to consider being involved with our ministry, to give and receive healing, meaning and purpose, in a new and exciting way.



To learn more visit
www.sjlm.org/volunteer

Email **Carissa Welsh**,
Community Volunteer Coordinator
at volunteer@sjlm.org or call 655-7727.

RECLAIM THE ABILITY TO ITEMIZE IN 2018

With passage of the 2017 Tax Cuts and Jobs Act, many tax filers lost the ability to itemize due to the increased standard deduction. Married couples filing a joint federal tax return will need to exceed \$24,000 in medical, mortgage interest and property tax expenses along with their charitable deductions before they can itemize on IRS Schedule A. For many people with charitable intent in their hearts, their financial gifts, while remaining incredibly meaningful for the recipient organizations, just became less meaningful on their 2018 tax returns.

Planned giving is the key to reclaiming a taxpayer's ability to itemize. Giving tools such as gift annuities, charitable remainder trusts and life estates tend to generate charitable tax deductions well above the standard deduction in the first place. More often than not, the deductions created are substantial enough to be carried forward into future tax years, creating additional tax savings through itemization. Note that it is important to consult with the proper experts such as gift planners, tax and legal advisors to determine individual tax benefits of planned giving.

For example, a married couple ages 78 and 75 will

generate \$5,000 per year in mostly tax-free income for the rest of their lives with a \$100,000 charitable gift annuity. The gift creates an immediate \$42,000 deduction which well exceeds their standard deduction thus allowing them to itemize their other expenses and charitable contributions (think church offerings). If that couple lives in Montana, the Montana Endowment Tax Credit allows for a state income tax credit of up to \$20,000 in the year of the gift. With a joint life expectancy of 19.2 years, the value of the income ($\$5,000 \times 19.2 = \$96,000$) in combination with the federal and state tax savings will more than exceed the initial value of the gift.

The reduction in itemizations does not spell doom for charitable organizations as some have predicted. Far

from it - givers will seek to support the organizations they hold dear because giving starts in the heart. But because giving ends in the wallet, savvy givers will desire to seek ways to retain the tax benefits of giving. The St. John's Foundation can help; donor gifts sustain the mission of providing living opportunities within nurturing environments of hope, dignity and love. Please see the Ways to Give for information on how to contact St. John's planned giving staff.

Ways to Give

GIVE NOW

Make an immediate, outright charitable gift.

GIVE LATER

Keep control of use of assets while living and make a charitable gift upon death.

GIVE & RECEIVE

Make a charitable gift and receive ongoing income payments for life or a term of years. The remainder provides charitable support.

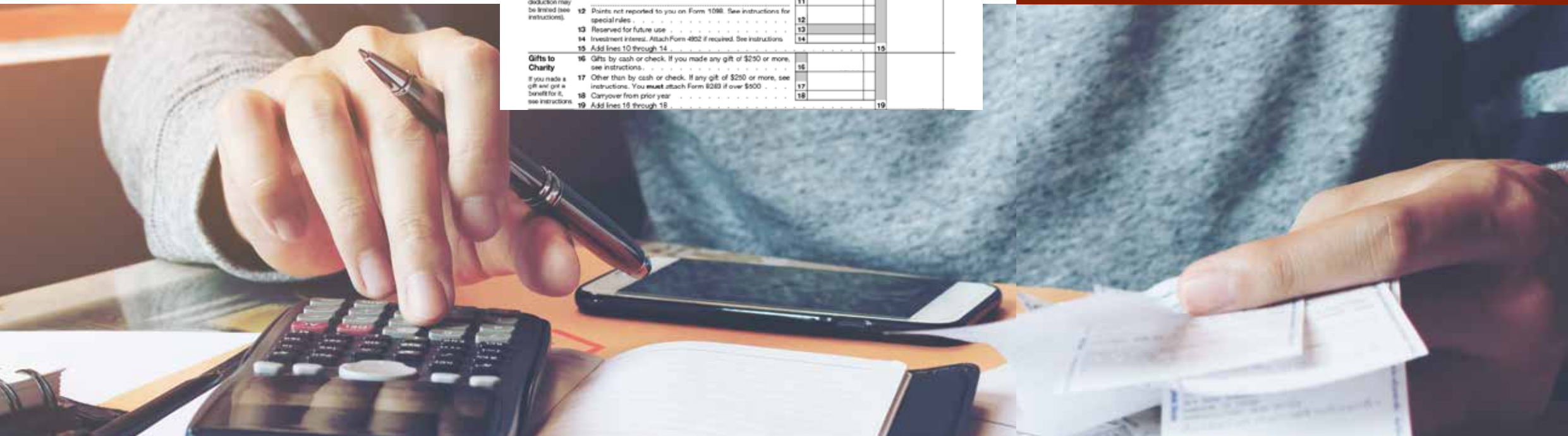
Contact **Rachel Simonson, CFP®**
GIFT PLANNER
406-655-7783



DATELINE: Billings, Montana, January 1998: Mission Ridge, Montana's first continuing care retirement community (CCRC) welcomes its first residents. Developed through a partnership between St. Vincent Healthcare and St. John's Lutheran Ministries (Missions United, Inc.), Mission Ridge made an impressive addition to Billings, highlighted by the Billings Gazette as "retirement with style" and a "new approach to life after the work years are over." Demand for Mission Ridge style living was so high that a second phase was completed in 2003 adding 35 apartments, underground parking and expanded dining.

A sister community, WyndStone, was welcomed in the Billings Heights in 2016. Connected physically and spiritually to the historic Little White Church - the former Faith Lutheran Church of Box Elder - WyndStone is nearly filled to capacity and making a positive difference in the lives of so many people on yet another Montana landscape.

Thanks for 20 great years of providing living opportunities within nurturing environments of hope, dignity and love!





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COMMEMORATIVE BRICKS

For a tax deductible donation, an inscription of your choosing will be engraved on a granite brick to be placed in the Fred & Marie Miller Pavilion on the Townsquare. The Townsquare is the location for the Summer Concert Series, weddings and other special events throughout the year. Proceeds from the sale of the bricks will benefit St. John's Lutheran Ministries.

**For more information please contact
Mara Flynn at 655-5716
or go to our website
www.sjlm.org/foundation/bricks/
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