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If the **Mission Advancement** department may be of service, please contact us.

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# Mission Advancement UPDATE

**SPRING 2023**

## DEAR DONORS

2022 was a year of reinvigoration and reengagement for our donors, event participants and other fundraising programs. Your support helped Masonic Homes Kentucky raise more than \$2.4 million.



Our Friends of Masonic and Friends of Sproutlings programs, that connect individual donors giving one-time or recurring gifts, raised nearly \$60,000 combined. Masonic's employee giving fund, IMPACT, and the Walters-Judy Scholarship fund will be able to reinvest more than \$9,000 received this year to support and develop Masonic's workforce.

Capital projects to refurnish resident rooms at Sam Swope Care Center, create outdoor recreation activities and replace and maintain the vehicle transportation our residents in Shelbyville enjoy so much benefitted from your generous donations totaling \$235,650. St. John's Day League raised almost \$15,000 for residents and the James Garnett Fellowship added \$65,700 to Masonic's endowment. Plus, our schedule full of successful events added more than \$329,000. It was a tremendous year.

We're building on this momentum and strategically planning our next five years. We look to fully fund more than \$3 million for capital projects to furnish resident rooms at the Care Center and a not-yet-announced outdoor activity center that you'll have to see to believe. We will work more efficiently so that more money can go towards more mission. That means leveraging data and technology to drive donor development and allow a donor-directed fundraising program. That and more will grow

estate, bequests and trust revenue, donations and fundraising to support 60% of the operating expenses for Charitable Care.

I'm happy to announce the hiring of our new Vice President of Mission Advancement Meg Williams. Meg brings more than 20 years of experience in donor relations, fund development and grant writing. Her career highlights include leadership positions in development and giving with the Country Music Foundation in Nashville, TN and the Indianapolis Symphony Orchestra.

Meg will oversee volunteer recruitment, donor cultivation, stewardship, solicitation, grant writing and fundraising events.

She graduated cum laude from Butler University in Indianapolis with a bachelor's of science in arts administration and a master of public affairs in nonprofit management from Indiana University.

Meg will manage our Carefree Living events, Sproutlings Annual Golf Scramble, Jim Johnson Charity Golf Classic and the Masonic Masquerade Gala committees to ensure another great year. She will also be our main grant writer to allow Masonic to grow its foundation and grant funding.



Please visit **[masonichomesky.com/giving](https://masonichomesky.com/giving)** for more information on our giving programs and fundraising events.

## APRIL

- Great Day of Service / Masonic Home Louisville & Shelbyville Campuses – April 22

## JUNE

- Sproutlings Annual Golf Scramble / Valhalla Golf Club – June 12

## JULY

- Masonic Alumni Reunion – July 9

## AUGUST

- Louisville Carefree Living Luncheon / The Olmsted – August 24

## SEPTEMBER

- Bowling Green Dinner and Auction / The Club at Olde Stone – September 10
- Annual Jim Johnson Charity Golf Classic / The Club at Olde Stone – September 11
- The Olmsted Society Dinner / Meadow Active Lifestyle Community – September 21

## OCTOBER

- Masonic Masquerade Gala / The Olmsted – October 20



**MARK  
YOUR  
CALENDAR**





## GIVING OPTIONS

### Donating Your Life Insurance Benefits May Extend the Value of Your Policy

In most cases, a life insurance policy is purchased to replace the income your family would need should you pass away. Some individuals have old policies and may not be sure what to do with them. Cashing in the policy may result in owing significant taxes because of accrued dividend income.

However, donating the policy to a charity endowment could provide a large write-off for the cash value of the policy. In most cases, you'll receive future write-offs by helping fund a policy that will be added to a charity.

Another option is to change the beneficiary. If a policy is set to go to a spouse, who has passed, you

can change your beneficiary to another individual or organization. By changing the beneficiary, all life insurance value goes to the nominated organization.

If you simply don't want to pay the premiums any longer, consider

allowing dividends or cash value to pay for the policy premiums. Many life insurance policies have the option to stop paying the premiums after you've had the policy for a number of years. Before you decide you want to cash the policy in, consider donating the policy to a favorite charity and taking the tax deduction.

Consult your tax advisor to determine the specific benefits available to you.

For more information on ways to donate, email us at [giving@masonicky.com](mailto:giving@masonicky.com).

## COMMUNITY FEATURE

### Shelbyville Renovations

Last year, Masonic's Shelbyville Campus completed a renovation of Pillars Assisted Living & Personal Care creating 21 private apartments with newly remodeled bathrooms, flooring and décor and an updated dining area. Through generous donor gifts, a beautiful sun porch and outdoor patio have become resident favorites.



This year, the refresh continued with remodeling for long-term, private pay residents. Along with offering 11 private apartments, a new outdoor space is being constructed off the dining room.

Masonic Home Shelbyville is emerging as a teaching community through partnerships with Galen College of Nursing and Shelby County Area Technology Center (ATC), and University of Kentucky.

"We have nursing students completing certification classes, and 24 students from the ATC started their clinicals in February," said Joetta Jouett, infection control specialist and nurse educator. "We have also employed six of the students for Pillars. This partnership has proven to be a win-win."



The 24 high school students from the ATC shadow Shelbyville's certified nursing assistants, personal care medical technicians and life enrichment activities.

In February, Galen nursing students started their long-term care clinical rotations and three Shelbyville employees recently started licensed practical nursing school. Their most recent partnership with the University of Kentucky will provide certified nursing assistant training on site.

### Carefree Living Luncheon

Masonic held its second annual Carefree Living Luncheon in Shelbyville featuring keynote speaker Cheryl Van Stockum on February 13. The event raised \$41,000 exceeding its goal and benefitting Charitable Care.



## FEATURED EVENT

### Sproutlings Golf Scramble

The 2023 Sproutlings Golf Scramble returns to Valhalla Golf Club on Monday, June 12 and starts with registration and lunch at noon. Golfers tee off at 1 pm and an awards reception is held immediately following the scramble. Proceeds support Sproutlings Pediatric Day Care & Preschool at Kosair Charities Center, the only Prescribed Pediatric Extended Care center in the region that fully integrates both medically-fragile and typical students.

## — MEMORIAL TREES —

Mary Pat & Kim VonderHaar

Caryn Isaacs

Alex and Marissa Olson

## — MEMORIAL GIFTS —

Mac Adair

Mr. and Mrs. J Scott Judy

Mr. and Mrs. Rick Reeve

Helen Bailey

Mary Jean Babic

Gary Ray Hatter, Sr.

Colonel Clay Lodge No. 159

Kyle Love

Janis Bible

Marilyn McClure

Mr. and Mrs. Danny Kemble

Raymond L. McGuire

Mary P. Johnstone

Melonye Ridgway

Jim Overfield

Clinton Lodge No. 82

Brogan Ruppert

John M. Sammons

H.L. Thomason

Clinton Lodge No. 82

