



# Lutheran Social Ministry of the Southwest

## Annual Report 2000

1999-2000

### *Board of Directors*

- Jeffrey J. Jorgenson,  
*President*
- David Strang,  
*Vice President*
- Ruth Linner, *Secretary*
- Joel Cmiel, *Treasurer*
- Jacqueline Edwards-Pagel
- Arnold Frank
- Karen Novachek
- Truls Person
- Jacquelyn Power
- Susan D. Sauerberg
- Selina Witt

### *Executive Team*

- Lynn Baker  
*Executive Director*
- David Miller  
*Controller*
- Cathy De Lisa  
*Development Director*
- Traci Gruenberger  
*Community & Family  
Services Director*
- Craig Thoresen  
*Multi-Cultural Services  
Director*
- Jody Wood  
*Senior Services Director*



### Message from Executive Director Lynn Baker

*T*his past year has truly been a remarkable one for LSMS. We acquired new ministries; consolidated existing programs; acquired a new administrative and financial team; and showed a noticeable improvement in the health of the agency. Much of our success is due directly to the involvement of our supporting congregations; dedicated staff and energetic volunteers; a caring board, supportive partners, generous donors; and quality and innovative programs.

Our faith background has not only sustained us but has given us the courage to step out and try new opportunities. This is demonstrated by the tremendous growth in our Senior Service Division; the expansion of our Refugee Resettlement Program to include immigration services; and the church partnerships with our Community and Family Services.

Our goal this year is to build on the foundation of our mission, and on our strength as an agency. It is my hope that this Annual Report will present a clear and consistent message to our constituents and our communities who we have been, who we are, and what we are about—people helping people! Our most sincere thanks for your past support, and we ask for your continuing gifts in 2001 and beyond.

**W**e wish to thank the Lutheran Church Extension Fund and California Lutheran Homes for actions that have helped us to manage our debt and allow a growing financial stability. We would also like to thank The Internext Group for providing technical expertise and support in numerous areas to assist in our recovery and growth.

LSMS appreciates the support of Aid Association for Lutherans in sponsoring this annual report.

# Lutheran Community & Family Services

## 2000 HIGHLIGHTS & ACCOMPLISHMENTS



*An opportunity for a refreshing shower and a new set of clothing brings a smile to the face of this Tucson HelpCare client.*

### East Valley Programs

- 22 churches in the East Valley partnered with LSMS to continue essential services provided through Community & Family Services (CFS)
- 70 families (420 individuals) received food, clothing and household items, monthly
- Ministry Support Team was developed to assist CFS
- Volunteer Mentor Family training was held in collaboration with Parents Anonymous

- FEMA grant was awarded for rental or mortgage assistance

### Tucson HelpCare

- 350 clients received food, clothing and hygiene items on a monthly basis
- Shower and laundry facilities provided to 160 individuals monthly
- The sale of SCRIP gift certificates provided all financial assistance for clients

### Marriage Ministry

- Marriage Enrichment Retreat in Tucson
- Lutheran Brotherhood grant awarded in support of the Marriage Ministry program
- Plans formulated for the Marriage Enrichment Series, and a "Visioning" event in 2001

### FIRST (Family Interfaith Resource & Support Telephone)

- Two part-time staff and 20 volunteers handled more than 500 crisis calls monthly
- A new phone support program called FIRST FRIENDS was developed for elderly, homebound, disabled or isolated individuals



*East Valley Adult Day Care client Nancy bonds with Senior Manager Carol Grasso.*

# Lutheran Senior Services

## 2000 HIGHLIGHTS & ACCOMPLISHMENTS

### East Valley Adult Day Health Care

- Served 60-70 clients monthly
- Selected to receive two eight-passenger wheelchair vans valued at \$60,000 each from Maricopa Association of Governments and funding from Mesa United Way
- Sustained contracts with Area Agency on Aging Region One and Pinal County Long Term Care
- Raised \$3,000 through annual fundraiser

### DayBreak Adult Day Health Care, Apache Junction

- Served 20-25 clients monthly
- Honored by Apache Junction Chamber of Commerce during its Grand Opening

*continued ...*

# Lutheran Multi-Cultural Services

## 2000 HIGHLIGHTS & ACCOMPLISHMENTS

### Refugee Resettlement

- Resettled more than 500 refugees from political hot spots throughout the world, including the former Yugoslavia, Vietnam, Cuba, Equatorial Guinea, Togo, Sudan, Ethiopia, Iran, Iraq, Afghanistan, Liberia, Sierra Leone, Nigeria, Rwanda, Russia, Congo and Somalia
- Placed 90-95 percent of all employable refugees into the Phoenix area workforce
- Recognized as having the largest refugee employment incentive program (Match Grant) in the Lutheran Immigration and Refugee Service (LIRS) affiliate network
- Received award for the Greatest Amount of Community Support (match grant contributions) in 2000 by both LIRS and Church World Services (CWS)

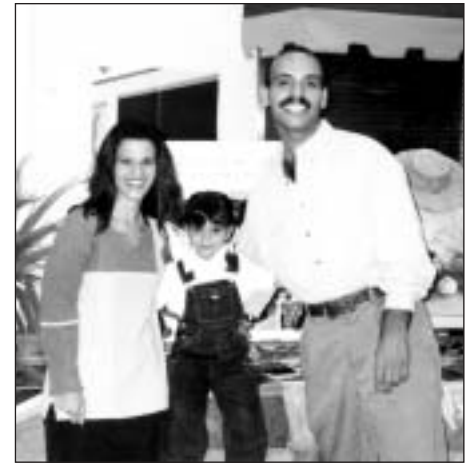
- Chosen as one of five sites nationwide to participate in a new LIRS Leadership Initiative for Immigration Communities. The accompanying \$10,000 grant is being used to train refugee community leaders living in Maricopa County
- Selected as a designated Kakuma Youth resettlement site by both LIRS and CWS
- Increased on-staff language capacity from 12 to 17 languages

### English as a Second Language (ESL)

- Expanded the number of ESL classes offered from 13 to 21
- Provided ESL services free of charge to all refugees in Maricopa County

### Immigration Services

- Granted \$5,000 as seed funding from LIRS and Presbyterian



*LSMS Caseworker Ahmad Ajil (Iraq) and his family celebrate during a Southwest Cultural Celebration for refugee families.*

Disaster Assistance to begin an Immigration Services program in Phoenix for refugees and asylees

### Church Sponsorship

- Established relationships with church communities resulting in more than 20 new church sponsorships of refugee families

### *Lutheran Senior Services continued ...*

- Awarded contracts with Pinal County Long Term Care, Area Agency on Aging Region One, and Pinal-Gila Council for Senior Citizens

### DayBreak Adult Day Health Care, Tucson

- Served 40-50 clients monthly
- Raised \$5,000 through annual fundraiser
- Continued long-standing relationships with the University of Arizona Elder Rehab program and the Arizona Parkinson's Disease Association
- Increased scholarship program awards to \$8,000 for families in need of respite services

### DayBreak Home-Based Services, Tucson

- Served more than 350 seniors monthly
- Received \$16,000 in grant funding from JobPath to continue and enhance specialized training and advancement program for health care employees

- Achieved status as largest provider of respite, house-keeping and personal care for Pima Health Systems, resulting in significant growth agency-wide

### DayBreak Home-Based Services, East Valley

- Held strategic planning sessions to begin services in 2001

### Tucson Lutheran Homes

- Secured a commitment by Lutheran Brotherhood and Hearts & Hammers to build an enclosed patio for residents—their volunteer efforts will save the organization about \$10,000. Completion is anticipated in 2001

### Training and Clinical Services

- Plans were finalized to begin a new Training and Clinical Services division of Lutheran Senior Services to provide entry-level health care workers with ESL support and training essential for advancement in the field

# Lutheran Financial Information

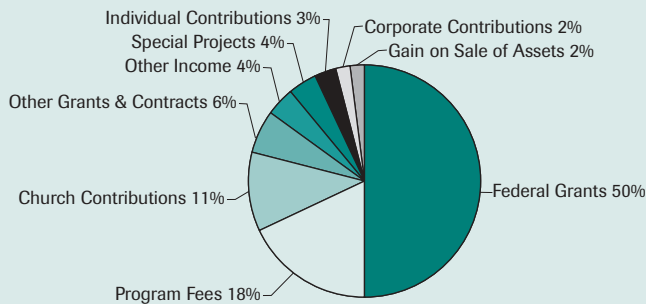
## Comparative Statements of Financial Position For the Two Years Ending December 31, 2000 and December 31, 1999 (Compiled from Fiscal Year 2000 and 1999 Audit Reports)

	December 31	
	2000	1999
Total Assets	\$ 1,110,255	\$ 416,797
Total Liabilities	\$ 1,221,342	\$ 908,060
Total Net Assets	(111,087)	(491,623)
Total Liabilities and Net Assets	\$ 1,110,255	\$ 416,437

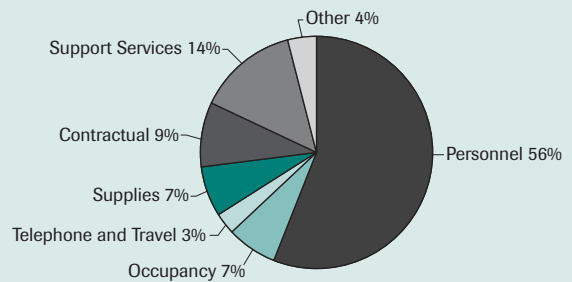
## Comparative Statements of Activities For the Two Years Ending December 31, 2000 and December 31, 1999 (Compiled from Fiscal Year 2000 and 1999 Audit Reports)

	December 31	
	2000	1999
Total revenues and other support from operations	\$3,084,567	\$2,690,497
Total other revenues	73,616	33,579
Total revenues	3,158,183	2,724,076
Total expenses	3,112,279	2,855,547
Revenues OVER (under) expenses	<b>\$ 45,904</b>	\$ (131,471)

### LSMS Sources of Revenue For the Year Ending December 31, 2000



### LSMS Functional Expenses For the Year Ending December 31, 2000



### Message from the Controller:

Financially the year ending December 31, 2000 showed a noticeable improvement in the health of Lutheran Social Ministry of the Southwest. The Agency showed an operational profit of **\$45,904** and our Net Assets had a positive increase amounting to \$380,176. Much of the financial success for LSMS in 2000 can be attributed to the unwavering support of the Synod, the District, our congregations, individual donors and the hard work of direct care staff and management.

Going into the year 2001 we are optimistic about the future of our Agency. Our programs are growing and we anticipate that there will be new opportunities for us to expand our mission. ■

**LSMS Strives to Be Good Stewards of All Funding**

**87 percent of all funds goes directly to programs and services that benefit those in need.**