Samaritan Bethany

# ANNUAL REPORT

## 2025 - 2026



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## OUR VISION:

*A caring home where each life has meaning and purpose.*

## OUR MISSION:

*Providing compassionate individual-directed care that enhances and strengthens the greater community.*

## OUR CORE VALUES:

### Spirituality

*We recognize, respect and nurture the spiritual beliefs of each individual.*

### Respect and Dignity

*Each individual is treated with courtesy, sensitivity, and genuine care for their deserved personal worth.*

### Holistic

*Services are provided with consideration given to every aspect of the individual's well-being: physical, mental, emotional, spiritual, environmental and social.*

### Continuous Improvement

*We consistently pursue excellence in all areas of service.*

### Education

*We continuously invest in the staff's knowledge and improvement of skills.*

### Fiscal Responsibility

*We conduct our business in a manner that allows us to remain financially viable.*

# 2026 Board of Directors

### Samaritan Bethany, Inc.

John Haug, President
Pam Shulze, Vice President
Bob Beaulieu, Treasurer
Bev Moravec, Secretary

Kirby Bakken
Kristelle Behle
Lisa Nordman
Karen Hartman
Joe Phillips
Jim Ronnenberg
Jerry Swanson

### Outgoing Board Members

Terry Bird, Corporate Board (9 years)
Lori Paul, Corporate Board (3 years)

Scott Moon, Foundation Board (9 years)
Greg Schliesman, Foundation Board (9 years)
Tim Valen, Foundation Board (9 years)





This past year Terry was also recognized as a nominated finalist for the 2026 Board of Trustee Award with Leading Age MN.

### Samaritan Bethany Foundation

Josh Haynes, President
Maggie Cook, Vice President
Jane Quaintance, Secretary / Treasurer
Katie Zahasky, At Large
Steve Christopherson
Kelly McRae

### Thank You to Our Board Members

We offer our sincere thanks to all of our board members for their dedication and steadfast commitment. Your wisdom and direction continue to play a vital role in moving our mission and vision forward.

### A Special Thank You to Our Outgoing Members

We extend our gratitude to our outgoing board members for their years of dedicated commitment and faithful service. Your leadership and steady investment of time and energy have made a lasting difference in our organization. We are thankful for the passion and expertise you've shared, and for the strong foundation your years of involvement have helped build.

# Sponsoring Churches

We are sincerely thankful for our sponsoring churches and the faithful partnership you share with Samaritan Bethany. Your generosity, leadership, and steady support throughout the year make a meaningful difference in our ability to serve others with compassion and excellence. From your commitment to our annual campaign to the many ways you give your time and talents, your involvement strengthens our mission every day.

We are truly grateful to serve as ministry partners alongside you. Whether through governance, volunteer engagement, or spiritual encouragement, your presence and prayers help sustain and guide our work.



*Peace United Church of Christ*



*Bethel Lutheran*



*Gloria Dei Lutheran*



*Hosanna Lutheran*



*Our Savior's Lutheran*



*Zumbro Lutheran*



*Christ Lutheran, Byron*

# A Message from the Co-Mission Leaders

To our residents, families, team members, volunteers, donors, community partners, and friends of Samaritan Bethany—thank you.

As we reflect on the 2025–2026 year, we are filled with gratitude for each person who has walked through our doors and become part of the Samaritan Bethany story. Whether you entrusted us with the care of someone you love, generously supported our mission, volunteered your time and talents, worked alongside us, or simply helped make our community a better place to call home, you have played an important role in our success.

This past year has been one of continued progress and positive momentum. We are proud to have experienced a strong financial year while also making meaningful strides in the culture of Samaritan Bethany. Together, we continue to build an organization centered around our mission, our people, and most importantly, the residents we are privileged to serve.

As we look toward the future, growth is on the horizon. After nearly two years of planning and working through the approval process with the Minnesota Department of Health, we are thrilled to be moving forward with a new Assisted Living neighborhood at Arbor Terrace. This expansion will add a total of 27 additional apartments, bringing Arbor Terrace to a total of 109 apartments. We will begin by opening half of these rooms in January 2027. More than simply adding rooms, this expansion gives us the opportunity to welcome more individuals into our community and provide a place where they can truly feel at home.

We have also continued investing in the spaces our residents enjoy every day. Over the past year, we refreshed living and gathering areas, gave our conference spaces a much-needed facelift, and continued improvements throughout our campus. Thanks to the generosity surrounding our annual campaign, new furniture for The Home on Eighth is also in the process of being purchased and placed throughout the neighborhoods, creating comfortable and welcoming spaces for residents, families, and friends to gather.

Thank you for believing in our mission, supporting our residents, and being part of Samaritan Bethany. We are incredibly proud of what we have accomplished together and excited for what the next chapter will bring.



Kyla Berg



Rachael Maxfield

# 2026 Stars Among Us
# Excellence in Practice Award



We're excited to share that Samaritan Bethany was honored with the Workforce Development – Excellence in Practice Award through the Stars Among Us program, from LeadingAge Minnesota. This recognition celebrated our Onboarding and Orientation Program and reflects our deep commitment to creating a welcoming and supportive experience for every new team member. From day one, our goal is to ensure employees feel prepared and confident as they begin their work with us.

The Stars Among Us awards recognize outstanding achievements and contributions in the active aging field, highlighting organizations that make a meaningful impact in their communities. Receiving this award gave us the opportunity to share our onboarding success and best practices with other providers across the industry at this year's annual Institute Conference. It also affirms the intentional work being done across our organization to strengthen engagement and improve retention through thoughtful workforce development.

We especially want to recognize Anna Pence-Bouska and Denielle Villar, who serve as the face of our onboarding and orientation program. Their leadership and dedication have helped shape and continually enhance an experience that truly reflects our mission and values. Their person-centered approach and hands-on investment in each new hire played a key role in earning this recognition.

# *Sharing Generosity Throughout Our Rochester Community*

This season, under the guidance of Chaplain Darin Olson, the Samaritan Bethany Chapel Council was established with a vision of putting faith into action. Through chapel tithes and offerings, residents, family members, and guests have shared their generosity with organizations serving people throughout the Rochester community.

The idea was simple: when we give together, even small gifts can become a meaningful blessing to someone else. Throughout the year, the Chapel Council looked for local organizations whose missions reflect compassion and care for others. The group had the privilege of meeting with representatives from organizations, learning more about their work, and personally presenting several of the gifts.

The chapel generously supported:

- Big Brothers and Big Sisters of Southern Minnesota
- The Salvation Army Good Samaritan Health Clinic
- The Women's Shelter of Rochester
- Dorothy Day Hospitality House
- Elder Network
- The Landing MN
- Ronald McDonald House
- Channel One Food Bank

Together, these organizations support children and families, older adults and caregivers, individuals experiencing homelessness, people in need of health care, and those facing difficult and challenging circumstances.

What began with a vision to put faith into action has become a meaningful ministry. The gifts are a reminder that our residents have much to give and that their kindness can reach beyond Samaritan Bethany.

We are grateful for Pastor Darin Olson's leadership, the work of the Chapel Council, and everyone who faithfully contributes through their tithes, offerings, and prayers.



# Homes for the Aging Week

Each year we celebrate Homes for the Aging Week and this year we brought a little Kentucky Derby spirit to Samaritan Bethany. Throughout the week, residents, families, staff and friends came together for fun, laughter, and plenty of opportunities to celebrate with the people who make Samaritan Bethany a special place to call home. The campus was filled with Derby-inspired decorations and festive activities.

Residents enjoyed the week by taking part in activities designed to bring a little extra spark to each day. Staff joined in the celebration, helping create an atmosphere that felt more like a big derby party than your typical week. One of the best parts of Home for the Aging Week is seeing how quickly a theme can bring people together. A little friendly competition and a chance to dress up can create memories that last long after the decorations come down.

At Samaritan Bethany, we believe home is more than a place. It is the people you share it with and the moments you create together. Let the races continue and hats off to another great year!



# 2026 Golf Classic

The 19th Annual Samaritan Bethany Golf Classic brought together an incredible group of golfers, sponsors, volunteers, and friends for a day filled with great weather, and friendly competition.

Together, we raised more than $21,000 to enhance the lives of Samaritan Bethany residents. Every sponsorship and donation helped to create welcoming spaces that make our communities feel more like home.

Thank you to everyone who made this year's Golf Classic such a memorable success. Your generosity and enthusiasm continue to make a lasting difference, and we are grateful to have you as part of the Samaritan Bethany family.








# A Message from the Foundation Leader

Dear Friends,

Throughout this past year, we witnessed countless stories of compassion and hope as individuals, churches, businesses, and community organizations came together to support the residents of Samaritan Bethany. Your kindness helped strengthen programs and ensure that those entrusted to our care experience dignity and connection every day.

This season our partners came together in an extraordinary way, helping raise more than $90,000 toward our Home on 8th Furniture campaign. These gifts are transforming the living spaces, creating comfortable and welcoming environments that our residents call home.

The Foundation secured more than $52,000 in grant funding during the year. These grants allow us to invest in projects and programs that enhance the quality of life for our residents while supporting innovative care and services throughout Samaritan Bethany. We also rebranded our employee giving program as Hearts at Work. It reflects the compassion and generosity of our employees.



Wayne Stenberg

Whether you gave through your church, made a personal gift, sponsored an event, volunteered your time, or remembered us in your estate plans, your generosity strengthened our mission and brought comfort and hope to those we serve.

On behalf of everyone at Samaritan Bethany, thank you for making a lasting difference in the lives of the residents.

# A Message from the Human Resources Leader

Greetings!

I'm excited to have transitioned from the Life Enrichment Mentor position into the Human Resources Leader role at Samaritan Bethany and to have the opportunity to support the people who make our community what it is.

My journey in senior living has given me the opportunity to experience many areas of the business, but one thing has remained constant: the relationships are what make this work meaningful. In our Household Model of care, our staff aren't simply coming to work each day—they're helping create a home, building relationships, and becoming part of the everyday lives of the residents we serve.



Kelsey Wright

As I settle into this role, I'm looking forward to finding new ways to celebrate our Care Partners, support their growth, strengthen our connection with the greater community, and build lasting staffing solutions. Supporting our employees ultimately means supporting our residents, and I'm grateful for the opportunity to help create a workplace where both can thrive.

Samaritan Bethany

## Combined Financial Position for Corporate and Foundation as of Fiscal Year-End September 30, 2026

Balance Sheet

| | |
|---|---|
| **Current Assets:** | |
| Cash and Cash Equivalents | $ 4,428,601 |
| Accounts Receivable | $ 1,765,180 |
| Other Current Assets | $ 238,227 |
| Assets Whose Use is Limited | $ 2,770,261 |
| Investments | $ 4,505,881 |
| Property and Equipment (Net) | $ 21,252,299 |
| **Total Assets** | **$ 34,960,449** |
| **Current Liabilities:** | |
| Accounts Payable | $ 1,537,811 |
| Other Accruals | $ 172,595 |
| Deferred Revenue | $ 28,551 |
| Long Term Debt | $ 29,389,548 |
| Other Liabilities | $ 206,488 |
| Total Liabilities | $ 31,334,993 |
| **Net Assets** | **$ 3,625,456** |
| **Total Liabilities & Net Assets** | **$ 34,960,449** |

# A YEAR IN PICTURES!



*Homes for the Aging Week*



*Favorite Restaurant Dine-Ins*



*Celebrations*



*Cookouts*



*Arbor Terrace Picnic*



*19th Annual Golf Classic*




*Outings*



*Holidays*



*Baking*

# Donors and Contributors

Thank you to all the generous individuals, families and partners who make a lasting difference at Samaritan Bethany. Each gift plays an important part in helping Samaritan Bethany remain a place where people can live and thrive.

### *The Good Samaritan*

*Proverbs 11:25*
*$100,000 +*

Samaritan Bethany Auxiliary
Gloria Dei Lutheran Church
Bethel Lutheran Church

### *The Called*

*Deuteronomy 15:10*
*$50,000 - $99,999*

Zumbro Lutheran Church

### *The Compassionate*

*Hebrews 13:16*
*$25,000 - $49,999*

*Benike Construction*
**Rae Dunn and Ruth Larson*
***LeadingAge MN Foundation*
Samaritan Bethany Inc.
Sterling LTC Pharmacy
Sterling State Bank
Dr. and Mrs. Russell Wiesner

**** New Level.***
***** New This Year.***

### *The Gracious*

Luke 6:38
$15,000 - $24,999

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### *The Faithful*

*2 Corinthians 9:7*
*$10,000 - $14,999*

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## *Hearts at Work*

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*If we have inadvertently omitted your name, or spelled it incorrectly, please accept our apology and let us know so we can correct it in the future.*

# Donors and Contributors



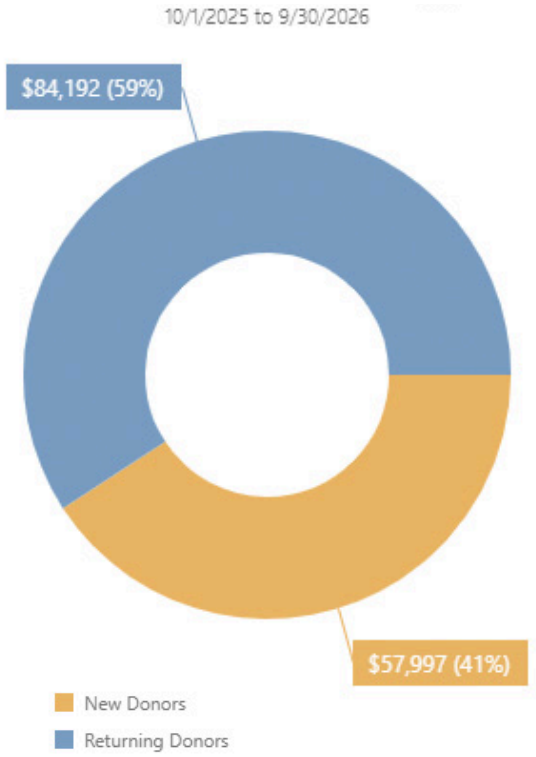







## Hearts at Work

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Ronnie Robertson
Lynn Rundquist
Keneth Samson
Linnea Seiver
Eliana Sifuentes
Ryan Skodowski
Stephanie Spaid
Wayne Stenberg
Meisha Stewart
Shannon Svendsen
Michelle Tellier
Denielle Villar
Pam Volk
Kelsey Wright
Kristina Wright-Peterson
Runlian Zhang




The strong support from both returning and new donors demonstrates the generosity of our community and the commitment to our mission. We are truly grateful to everyone who chose to support Samaritan Bethany this year. The dedication to improve the lives of those we serve makes a difference whether it is a penny or five dollars gifted each pay check!









# Volunteers

At Samaritan Bethany, our volunteers are truly the heart of our community. We are incredibly blessed and grateful for the wonderful individuals who so generously share their time, talents, and compassion to make a meaningful difference in the lives of our residents. Their generosity and selflessness reflect the very heart of Samaritan Bethany's mission, and we cannot thank them enough for the difference they make each and every day.

To all of our volunteers, thank you for sharing your hearts with us. Your kindness leaves a lasting impact, and Samaritan Bethany is a better place because of you.

Lenora Anderson
Nancy Berg
Jean Briggs
Deana and Dave Carr
Sheila Coe
Yvonne Cronin
Kathy Dale
Beverly DeBus
Connie Deobald
Sandy Dilley
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Pam Shulze
Chloe Syhakhoun
Sue Webb
Julia Wood

## Years of Service

After 15 years of dedicated service to Samaritan Bethany, Ronnie Robertson, our Volunteer Coordinator, retired from her role. Ronnie was an incredible part of the Samaritan Bethany community, coordinating volunteers and helping bring countless events and special moments to life. From the Gift Shop and bingo to nail care, holiday celebrations, and so much more, Ronnie truly did it all. Her warm smile and caring spirit made a lasting difference in the lives of so many people. Ronnie is retired, but we are happy to share that she transitioned to a volunteer position.







# Samaritan Bethany

507-289-4031
www.samaritanbethany.com
foundation@samaritanbethany.com
24 8th St. NW, Rochester, MN