

CELEBRATING 25 YEARS | WINTER 2026

# ArLiberty



2025 DONOR REPORT EDITION



## A Farewell Greeting from Luanne

As I reflect on Liberty Lutheran's remarkable 25-year anniversary, the common thread that defined our success is the extraordinary culture we built.

From my days caring for residents at Lutheran Home at Germantown in the 1970s to my tenure as President and CEO, I always believed that the right organizational culture shapes everything. The simple but profound conviction that older adults deserve to be treated exceptionally well and that those dedicated to their care deserve the same has been my North Star from the start.

Liberty has been ahead of the curve in making our culture intentional. From defining the core competencies that guide how the organization hires, trains, and evaluates staff, to our sabbatical program that helps prevent burnout, Liberty invested in our people as much as our facilities and programs. This, along with exacting standards for service, innovation, and fiscal responsibility has enabled the organization to enrich the lives of so many.

Culture has been key to Liberty's impressive employee longevity and national reputation for excellence. When you cultivate an environment where people feel valued, they stay. When people stay, they can deliver exceptional work. Because Liberty's employee satisfaction is far above industry norms, and because employees are encouraged to grow in their roles, Liberty can often nurture our talent and promote from within.

That's why it is especially meaningful that our next leader has been part of Liberty for nearly two decades. Senior Vice President and CFO John Barnum stepped into the role of CEO in November. Throughout his tenure, his fiscal expertise and leadership have been essential to our growth and success. Most importantly, John is an unwavering advocate of Liberty's values and culture. Our mission could not be in better hands.

The dedication of leadership and employees is only part of the story. What truly makes Liberty special are the families and residents who entrust us with their care and the generous donors who provide resources that allow each family of service to serve with compassion and creativity.

As Liberty celebrates our silver anniversary, I'm excited for what lies ahead. The acquisition of Victorian Village at Hatboro and construction of 20 new villas at The Village at Penn State are just the beginning of a future filled with promise. Guided by our strong culture and anchored in our pillars of excellence, Liberty is poised to thrive.

While I may have passed the torch to John, a large part of my heart will always remain with Liberty. I am grateful to have spent nearly five decades doing meaningful work and am honored to have shared this journey with you.

May God continue to bless you and your work in the years ahead.

A handwritten signature in black ink that reads "Luanne B. Fisher". The signature is written in a cursive, flowing style.

Luanne B. Fisher, PhD, NHA  
CEO Emerita, Liberty Lutheran

### ABOUT THE FRONT COVER:

Pictures from November 7th celebration for Luanne's retirement and Liberty Lutheran's 25th Anniversary.

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**A Message from John Barnum, CEO**



I am honored and excited to be in my new role as your CEO. One of the key reasons I pursued this position was my belief that I could provide Liberty with both continuity and thoughtful growth.

I firmly believe that there’s no need to reinvent the organization—we already have great teams in place. What we can and should do is build on what works, address areas where we can improve, and continue to embrace the values and culture that make Liberty exceptional.

In her role as CEO, Luanne Fisher created and nurtured the extraordinary culture that shapes everything we do. It has fostered remarkable team longevity and supported the outstanding care we deliver. It has also earned us a national reputation for excellence.

Our culture is critical to our continued success, and I am committed to preserving it as we chart our path forward. During my twenty years here, as part of my role as CFO, I’ve contributed to and been a trainer in Liberty’s Core Competency Training Program.

What has always set us apart is how deeply we value and respect our teams, Liberty’s greatest asset. They perform difficult, demanding work every day, and quality and longevity is why we’re able to provide the highest quality of care that seniors deserve.

Looking ahead, we will continue to grow steadily and thoughtfully, bringing Liberty’s culture and operational excellence to new communities, such as the recently acquired Victorian Village at Hatboro. By expanding our footprint with care and purpose, we can ensure that more seniors have access to compassionate care, security, and dignity.

I would like to express my heartfelt thanks to Luanne Fisher. Having had the privilege of working with her for many years, I’ve witnessed the passion and vision she has brought to Liberty. It has driven our mission, success, and growth, and it is a privilege to continue the work she began.

I am excited to embark on this new journey with all of you as we head into a future filled with promise.

Sincerely,

John M. Barnum  
 Chief Executive Officer





# The Liberty Way

## Fostering Liberty's Culture of Care

With Charmaine R. Maddrey-Smith,  
Director of Training and Leadership Development

### Q. What qualities define Liberty's culture?

**A.** It really boils down to sincere, genuine care. It starts at the top, from our president on down. People care about what they're doing. They care that our residents are being treated well and that it is a good environment for everyone.

Our customer service standards define our culture for both internal and external customers, with four customer service standards defining how we 1. welcome, 2. respect, 3. communicate, and 4. meet and exceed expectations. The genuine care we show residents, families, donors, volunteers, and all stakeholders—we expect that the staff is getting that same level of care.

### Q. What is the culture built on?

**A.** Everything hinges on our 10 core competencies. During new hire orientation, I introduce them. Later in their tenure, employees will attend our core competency training program where we go through all of them in depth.

Out of the 10 core competencies, I focus a lot on communication/listening, financial responsibility, emotional intelligence, and integrity and trust. Probably the biggest issues we have in our world is around communication. It takes a lot to craft and deliver an effective message.

The emotional intelligence competency is woven throughout everything. If you have heightened emotional intelligence, you'll be more thoughtful in the way you interact with others. You'll certainly be a more caring and compassionate person. We all need self-awareness, self-discipline, self-motivation, and empathy - the cornerstones of emotional intelligence. It's all part of relationship management.

### Q. How do you help every employee see their role as vital to the culture?

**A.** Everyone is considered a leader at Liberty. We don't believe that a title defines leadership. It's your ability to inspire, motivate and influence others using your unique gifts, skills, and talents.

We often talk about Liberty's "seven non-negotiables" for leaders. They are to be open, empowering, competent, affirming and kind, fair and honest, flexible, and outcome oriented. These qualities aren't just non-negotiable for those with supervisory titles. They are for all of us, because we are all interconnected. Every job is important here, and we all respect that.

This is an organization with "care" at the heart of everything we do. It starts by treating team members with care and respect, thus providing a model for those same behaviors when they interact with others.

### Liberty's 10 Core Competencies

1. Integrity and Trust
2. Caring Compassion
3. Customer Service
4. Leadership
5. Job Skills & Functional Knowledge
6. Communication/Listening
7. Team Orientation
8. Outcome Orientation
9. Financial Responsibility
10. Emotional Intelligence



## Advancing the Culture, Driving Operational Excellence

**Senior Vice President and COO Joan Myers has defined her career by mission-driven leadership and operational excellence. By combining compassionate service with administration and strategic planning, she has helped shape Liberty into an organization where culture and performance are inseparable.**

Joan oversees the executive directors of each community, manages sales and marketing operations, and works closely with leadership teams to maintain excellent standards of quality and care.

“There’s collaboration among all of us, and our outcomes are strong,” Joan says. “There’s real respect and camaraderie. The reason it all works is because of Liberty’s culture.”

Joan credits the leadership of former CEO Luanne Fisher for creating an environment where employees are respected and valued. From the start, Luanne established Liberty’s core competencies and pillars of excellence, embedding them into the fabric of the organization.

“Many companies are only now recognizing that success begins with treating your staff well. Here, that principle has been in place from the very beginning,” Joan says.

“Our pillars of excellence—internal customer service, external customer service, product innovation, and financial stability—also guide strategic planning at Liberty.”

“Your internal customers, which is your staff, come first. If you’re treated well, you’ll treat people well,” she says. This philosophy has resulted in remarkable employee longevity and strong outcomes across all Liberty communities. “People talk about how they don’t want to work anywhere else. For me, the opportunity to have my career here is a real gift.”

While Liberty’s culture provides the foundation, Joan ensures that it translates into operational excellence. As COO, she serves as the connective thread between communities by putting the culture in action and making certain that respect, collaboration, and accountability are woven into each staffing, system, and strategic decision.

“Luanne will be greatly missed,” Joan says. “But I am grateful that she’s provided us all with the foundational pieces we’re committed to preserving.”

Joan is also deeply committed to financial stewardship and reinvesting in staff, systems, and the facilities—all while balancing prudence with vision.

“Our future is about growing in the right way,” Joan explains. “And we are incredibly well-positioned to do that with the leadership of our new President and CEO, John Barnum.” Joan shares, “I have worked closely with John over the past 19 years when he was the CFO. John has been pivotal to Liberty’s success and growth and I am confident in our future with him as our leader.”



Liberty Lutheran often uses team building activities to reinforce core competencies.



## Home Sweet Home

Dana O'Donnell first joined Artman in 2001 as Director of Nursing. Then, after leading Liberty at Home and serving at The Hearth at Drexel, she returned as Executive Director in 2022. It was a true homecoming for her.

"I literally grew up here," she laughs.

Dana credits the extraordinary Liberty culture for her career achievements and longevity. "They've given me every opportunity to succeed," she says. "They've given me education. They've given me the autonomy to do things the way I felt they should be done. I could be a walking billboard for Liberty!"

"Luanne made a culture where you feel comfortable trying different things," she explains. "I think it's all about the support, the appreciation, the acknowledgement. They work really hard to develop great people. They can teach skills, but they can't teach talent. So they look for that talent, then reward and support it. I think that that's what makes Liberty so different."

Looking to the future, Dana is delighted that Liberty's longtime CFO stepped into the role of CEO. "The culture won't change with John Barnum at the helm," she says. "He cares about residents, and he cares about staff. He will support us 100%."

"I know a lot of people in the industry, and nobody gets what I get. Most don't feel like they belong to a family. As someone who grew up with Liberty, I can say it truly is."

## Penn State Pride Meets Community Living

Since 2004, The Village at Penn State has been a vibrant community. "Our Penn State affiliation enriches life here with access to athletic events, musical performances, and the theater," says Executive Director Ellen Corbin. "It keeps the residents young and active."

Ellen has been at The Village from the start, and when Liberty acquired it in 2012, she was impressed by its commitment to preserve The Village's personality while also investing in the facilities.

"We 'bleed blue,'" Ellen says with a laugh. "That's our identity. And we are also one of a few university-based retirement communities. Liberty infused a lot of capital into us and really brought us back to life."

Liberty also brought its unique culture to Happy Valley. The result is a lively, welcoming community where employees and residents are supported, and the evidence of this success can be seen in The Village's large waiting list.

Even more exciting things are on the way now that the new villa project has begun. The twenty villas under construction feature a forward-thinking design that combines the privacy of a cottage with spaciousness of an apartment—and plenty of amenities.

"Everybody's unit will look out over the stadium and Mount Nittany. It's a gorgeous view."

Rooted in Penn State pride and strengthened by Liberty's culture, The Village is moving confidently into the future. "I'm very proud to work here," Ellen says. "It's a great place to be."



## Putting the Heart in The Hearth

Dana Guyton started at Paul's Run as Housekeeping and Laundry Manager. As her responsibilities expanded, she successfully led multiple teams and was later promoted to Personal Care Administrator.

Now, as Executive Director at The Hearth at Drexel, she combines her operational and team-building talents to make a difference in the lives of both staff and residents. **Here is Dana in her own words.**



*I'm a big believer that people will do the right thing when they understand why we're asking them—and when they feel empowered. I've always wanted people to feel a sense of ownership. For me, The Hearth doesn't feel like just a place to work. It feels like it's mine.*

*I'm proud of not only what we do for our seniors, but also of how we care for one another. We value the human beings who work here. To receive a note of thanks from your CEO—fills you in a way that money can't. I say "thank you" to our team members here all the time. Thanks for sticking it out, for meeting and exceeding expectations, for seeing the vision and being part of it.*

*One of the great things about Liberty is how it invests in people's goals and dreams. I've received so much encouragement and support.*

## Liberty's Culture into Action

Over the past thirty years, Amy McCusker has held various roles at Paul's Run: supervisor, nurse manager, director of nursing, and now, Registered Nurse Assessment Coordinator (RNAC).

When Liberty Lutheran acquired Paul's Run in 2001, Amy was tentative at first. "I remember thinking, what's happening? But it wound up being a great thing. It's only brought positive things to our organization."

"We are more of a family, we have each other's backs, and we can bounce ideas off each other," she says. "That's important, especially in healthcare where things are constantly changing."

The sense of collaboration and teamwork has also made a measurable impact on patient outcomes. "The patients are becoming more complicated, but I feel like the outcomes are a lot better because we can talk about it with each other and say, 'I had that happen before at our community and this is what we did.' We have 101-year-olds who are still living their best lives," she says.

Above all, Amy is grateful for Liberty's investment in its people.

*"They put a lot of faith in their staff to do the right thing, and that's empowering. That belief comes all the way from the top. They get the most from their people because they promote good things, like time off and work-life balance and employee wellness. It's just a great place to work."*



Pictured left is Amy McCusker with Gina DeLorenzo on the right.

## It Just Feels Like Home

Wendy Petro has worked at The Manor at York Town since the community broke ground 25 years ago. She began as a part-time project coordinator during construction, and when they opened in 2001, she became the business office manager. In 2006 she was promoted to Executive Director and has held the role ever since.

When Liberty acquired The Manor in 2017, Wendy felt the difference in culture right away.

*“Liberty is a very caring and compassionate organization that focuses on the well-being of the staff and the residents they serve. As a non-profit organization, they put resources back into the community and are extremely vested in our success. They helped to steer The Manor into the strong, close-knit, family-oriented community we are today.”*

Wendy attributes the employee longevity and high resident satisfaction scores to the culture. When staff feel valued, they go the extra mile. “Our staff aren’t just here to get a paycheck. They truly care about the residents, and work together to try to meet or exceed their expectations every day.”



Wendy Petro, Executive Director (left) with Robyn Fine, Director of Community Life (right) at The Manor at York Town.

Liberty’s support extends beyond the staff and residents to the property itself. Over the years, The Manor has preserved its unique character, through capital improvements such as the recent refreshment of the lobby, hallways and other common areas, to the current dining room and patio renovations. “We’ve always prided ourselves on our small boutique hotel feel, and we’ve certainly kept that.”

Wendy is optimistic about the next 25 years. “I see good things ahead. I’ve been here from the very beginning, and we’ve never been as successful as we are right now. You know you’re doing a good job when prospective residents walk out of the community and say, “This just feels like home”.

## Welcome, Victorian Village at Hatboro!

Liberty Lutheran is pleased to announce the addition of Victorian Village in Hatboro, PA. This elegant, 55+ community expands Liberty’s presence in the growing senior living marketplace.

Located near Hatboro’s historic downtown, Victorian Village offers comfort and lifestyle. Spacious apartments feature open floor plans and modern finishes.

Welcome to the Liberty family!



## God's Work. Our Hands.



Wayne Matthias-Long has been connected with Lutheran Congregational Services (LCS) since its earliest days in 1973. A retired Lutheran pastor who served congregations in Emmaus, Reading, and Media, he remembers when LCS was known as Lutheran Chaplaincy Services and focused on training lay volunteers to provide spiritual care in healthcare facilities.

"The first two years of operation, more than 100 volunteers visited 1,000-2,000 people. Within 10 years, we had 500 volunteers," he recalls.

To meet the needs of congregations, LCS's programs evolved to include confirmation workshops, grief ministry, and marriage preparation.

In 1997 LCS became the coordinating agency for Lutheran Disaster Response in eastern Pa., applying many of the learnings from the response to the devastation caused by Hurricane Agnes to parts of northeastern Pa. in 1972.

"People are compassionate, but they need to know how to help. LDR helps identify the needs and is there for the long haul," he says.

As LCS's Board Chair from 2009-2011, Wayne was instrumental in LCS becoming affiliated with Liberty. "We were small but mighty, but our budget was a shoestring. We needed the undergirding of an organization like Liberty to continue, and our missions meshed so well. We're both here to show God's love and help others. It really is 'God's Work. Our Hands.'"

"I've been on several boards, and I've never been on one more rewarding than Liberty's. Luanne Fisher is the finest CEO I've ever worked with. We hate to see her go, but we wish her so much happiness in her retirement."

## The "Wow" of West Philadelphia

Rose Richardson comes to work early and stays late most days, but she loves every minute of it. Over the past decade as Executive Director of WPSCC, she's seen how Liberty's culture of compassion has both supported her staff and served seniors in her community. **Here is her experience, in her own words.**

*We are living proof of Liberty's culture. Liberty has not only provided services, but has cultivated spaces where employees are seen and supported. Their compassion and commitment to the community is simply above and beyond. It's a wonderful culture. They are caring and intentional—and if it weren't for them, we wouldn't exist.*

*The participants in our program are also part of Liberty's family, and they've been strengthened and sustained because of its commitment.*

*When people come in, they're amazed. They see the building, how expansive it is, the attention to detail, and cleanliness. And then they learn about our social, recreational, and educational programs. They always go, 'Wow!'*

*That's why we call ourselves the 'Wow' of West Philadelphia!*

*We also call ourselves a 'center without walls' because we're in the community, keeping up with the trends and giving seniors what they need. I see us continuing to be a hub and a resource for older adults in our community—not just maintaining, but exceeding what we've built.*

*Providing programs and services is what I love. When it's something that you love, it never feels like work.*



## Liberty Lutheran welcomes Greg Bobka, MBA, JD, LLM as our new Chief Financial Officer.

Greg brings 16 years of experience in Healthcare and Senior Living Finance primarily in the for-profit arena and over 30 years of accounting and finance experience. He served as CFO for Heritage Senior Living in Blue Bell, Pennsylvania. Greg's experience includes significant focus in finance, budgeting, operations support, and back office management.

Greg holds a B.S. degree in Finance from Creighton University, a Masters of Business Administration in Accounting from Washington University in St. Louis, a JD degree from Widener University, and a Master of Laws in Taxation from Washington University. Greg also holds an active attorney license in Pennsylvania.



“The culture of the company, focused on Mission, Service, Residents, and Employees, is palpable from the minute that you enter the building and it will be my distinct honor to work alongside the team here to deliver outstanding service to our residents as well as to maintain the positive work environment that exists.”

**For 25 years, Liberty Lutheran has faithfully walked alongside individuals and families—honoring choices, empowering independence, and strengthening communities.**

What began as a bold vision has grown into a vibrant network of services that now touches thousands of lives each year, grounded in compassion, dignity, and a deep commitment to well-being.



Celebrate this extraordinary milestone with us. Visit us at Liberty Lutheran's YouTube page to watch our special 25th anniversary video—or simply scan the QR code to experience the history, moments, and mission that continue to shape our future.





# A Generous Testament to Faith

**When Jim Brenneman and his wife Mary Jane** moved to Ambler in 1968, they were eager to find ways to give back to the community.

“I was brought up by the two most wonderful parents,” Jim recalls. “They were very active in their Lutheran Church in York, and I saw how important it was to give back for what the Lord has given us.”

As members of Christ Lutheran Church in Oreland, Jim and Mary Jane quickly became involved with various Lutheran charities.

“My wife volunteered at Artman, and I got involved doing volunteer work as well. That was the starting point.”

Then, when Jim retired from Bell Atlantic after a 36-year career in finance and leadership, he applied his experience—including 16 years on the Board of Gettysburg College—to help Liberty thrive. While working with senior leadership and serving on several committees, he also developed a deep appreciation for former CEO Luanne Fisher. Jim greatly credits Liberty’s success to her leadership.

“She’s tremendous at being visible and approachable, and she asks the key questions,” he says. “I’ve worked with many organizations. None can get close to the way Liberty Lutheran measures up.”

While Jim and Mary Jane established long-term gifts to help Liberty sustain its tradition of compassionate care, their most rewarding moment came when Artman unveiled its rehabilitation center.

“We were both very involved. I’m proud to say we have a room named after us. Everyone who has gone there speaks kind words about their experience. In fact, Mary Jane had very positive experiences at Artman’s rehab following each of her two knee replacement surgeries.”

Even at age 87, Jim continues to advocate for Liberty Lutheran by encouraging others to give generously.

“I tell people real-life stories,” he says. “That’s the real measuring stick—how do families feel about the care their loved ones received? I can put the gold star on the experiences I’ve known firsthand.”

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In the following pages, we are honored to recognize the generous donors who supported our mission during the fiscal year from **July 1, 2024, through June 30, 2025**. Your compassion makes all the difference—and we are truly grateful.

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## Revenue

COMPASSIONATE CARE (93.50%)	\$85,184,596
COMMUNITY CARE (<1%)	\$351,288
GRANTS (<1%)	\$668,280
WELLNESS (<1%)	\$306,165
OTHER (4.75%)	\$4,318,082

**\$90,828,411**  
Total Revenue

## Expenses

PROGRAM SERVICES (49.50%)	\$45,572,018
GENERAL & ADMINISTRATIVE (14.50%)	\$13,168,282
DEPRECIATION (9%)	\$8,398,988
INTEREST (5%)	\$4,390,751
LIABILITY INSURANCE (2%)	\$2,213,349
DEVELOPMENT (<1%)	\$455,212
BENEVOLENCE FUNDED (19.50%)	\$18,010,000

**\$92,208,600**  
Total Expenses

**Loss from Operations** \$1,380,189

**Net Gain on Investments** \$11,423,614

**Other Contributions** \$1,507,075

**\$11,550,500**  
Change in Net Assets (Gain)

## Revenue by Family of Service

### Liberty Communities

- 39% Paul's Run
- 25% Artman
- 20% The Village at Penn State
- 10% The Hearth at Drexel
- 4% The Manor at York Town

### Liberty Life Services

- <1% LCFS
- <1% Lutheran Congregational Services
- <1% Liberty Lutheran
- <1% Liberty Lutheran Foundation

## Building Resilient Individuals & Communities

Organizational Dollars to Continue Services where Shortfalls Exist

**\$2,063,000**  
Benevolent Care

**\$15,947,000**  
Unreimbursed Medicare and Medicaid

**\$18,010,000**  
Total Expenses



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Your gift to Liberty Lutheran **nurtures passions, provides strength, and brings hope** to thousands of individuals and families we serve. **Because of YOU, older adults thrive, communities grow** stronger, and those facing challenges **find support and encouragement.**

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