



UMRH

Annual Report

2023



THE UNITED METHODIST
RETIREMENT HOMES, INC.
UMRH.ORG



Our 2023 Front Cover Features:

Top image: Tyrone and Shereatha Baines enjoy the Fall Festival at Croasdaile Village.

Middle image: Croasdaile Village Resident, Carolyn London, shows her appreciation to Wilma Oakley, EVS Supervisor. **Bottom**

image: Wesley Pines Health Center residents enjoy watercolor painting.

The Mission

of The United Methodist Retirement Homes, Inc., a faith-based, non-profit, life plan organization, is to provide a lifestyle of wellness and overall enrichment, with access to long-term care for a diverse population of senior adults.



Executive Directors

Pictured above, left to right:
Heather March, Croasdaile Village;
Amy Shooter, Wesley Pines; Laurie
Stallings, Cypress Glen; Jonathan
Erickson, UMRH Corporate.

Editors & Contributors

Jonathan Erickson, Caleb Baker,
Stacy Dobson, Angie Pegram,
Heather March, Rebecca Marion-
Grady, Laurie Stallings, Elizabeth
Jenkins, Amy Shooter, Jim Haskins

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It is our pleasure to introduce to you the 2023 Annual Report.

We applaud the leadership and dedication of our executive directors, their department directors and teams, our corporate office personnel, and all employees working tirelessly in providing services and care to our residents. Throughout the year, we remained focused on the safety, health and wellbeing of our residents and staff. We also appreciate the great resources of Life Care Services (LCS), our management partner. LCS continued to provide educational updates, policies, support and guidance. We congratulate LCS on receiving the J.D. Power award for Highest in Customer Satisfaction among Senior Living Communities for a fifth year in a row and Highest in Customer Satisfaction among Assisted Living/Memory Care Communities. We are blessed with a wonderful group of volunteers on our board and local committees who dedicate their time, passion, leadership, experience, and skills to continue the Mission of UMRH to thrive, grow, and serve our residents and employees.

Our resident volunteers continued to stay engaged and are essential to the overall resident experience and satisfaction. Many of our residents serve on committees such as Spiritual Life, Building and Grounds, Life Enrichment and Wellness, to name a few.

As we are interconnected to the local communities where we reside, we feel that we should “give back” and are called to serve to our communities. Many residents volunteer at neighboring schools, hospitals, libraries and other organizations within the community.

As you will see in this report, there have been many successes from working to provide services in new and different ways, the continuation of the Croasdaile Village, Cypress Glen and Wesely Pines expansions, master planning, continued high standards for resident care, maintaining our Fitch BBB status, which demonstrates continued financial stability to our terrific resident-centered enrichment programs.

We are very thankful for the personal and financial contributions of the many residents, family members, corporations, the North Carolina Conference of the United Methodist Church and others. These contributions play a significant role in our ability to provide benevolent care and improve resident life.

Jonathan Erickson
UMRH Corporate Executive Director

W. Lee Harriss
UMRH Board of Trustees Chairman

UMRH and Foundation Board of Trustees & Directors



Top Row – Left to Right: Lee Harriss, Board Chairman; Rev. Paul Lee, Board Vice Chairman; Nancy Van Antwerp, Board Secretary; Susan Ezekiel, Board Treasurer; Carl Hardy. **Middle Row – Left to Right:** James Martin; Charles Mercer; Mack Parker; Rev. Gray Southern; Dr. Kenneth Steinweg. **Bottom Row – Left to Right:** Sheryl Taylor; Robert Brawley, Croasdaile Village Residents’ Association President; Bob Clinkscales, Cypress Glen Residents’ Association President; Dr. Richard Evans, Cypress Glen Local Committee President; Phyllis Pate, Wesley Pines Residents’ Association President.

UMRH and Community Leadership



Top Row – Left to Right: Jonathan Erickson, UMRH Corporate Executive Director; Stacy Dobson, UMRH Chief Financial Officer; Caleb Baker, UMRH Director of Development; Angie Pegram, UMRH Development Specialist and Executive Assistant; Heather March, Croasdaile Village Executive Director. **Bottom Row – Left to Right:** Rebecca Marion-Grady, Croasdaile Village Associate Executive Director; Sanya Alam, Croasdaile Village Healthcare Administrator; Amy Shooter, Wesley Pines Executive Director; Laurie Stallings, Cypress Glen Executive Director; Trey Hayes, Cypress Glen Healthcare Administrator.

Year-End Financials



Stacy Dobson
UMRH Chief Financial Officer

“UMRH remains financially strong and is positioned well to support growth.”

Mr. Don McNeill, of FORVIS, presented the audit report for UMRH for the fiscal year, ending September 30, 2023, to the UMRH Board of Trustees. He reported a clean audit with no adjusting entries and no material weaknesses. A copy of the completed audit is on file and available for viewing upon request.

Sources of Cash

Net Operating Income (NOI), Attrition Income, Investment Income, Borrowed Funds, Donations.

Uses of Cash

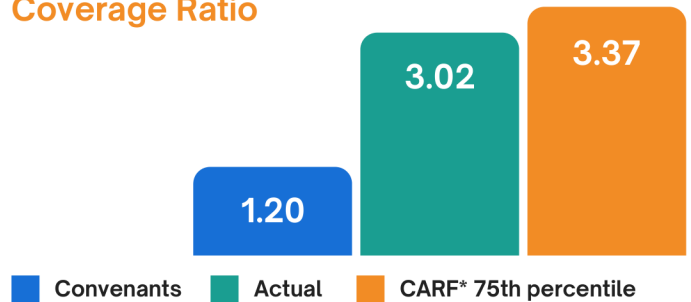
Debt Service, Community Enhancements, Increasing Reserves, Benevolences, Capital Improvements.

Covenants

“Covenants” are agreements UMRH has with its lenders. The covenants require UMRH to have a minimum of 250 days cash on hand, a 1.2 times debt service ratio coverage, and a 35% cash to debt ratio. The chart provided shows that all of these requirements are met.

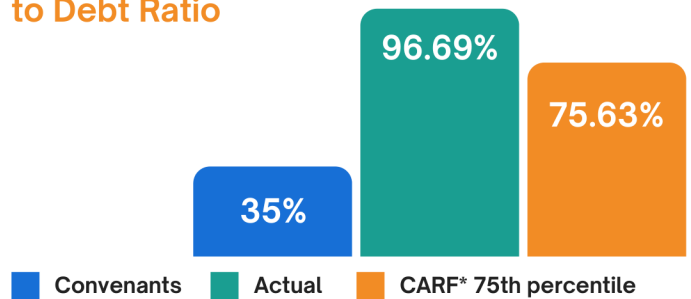
2023 Financial Achievements

UMRH, Inc. Debt Service Coverage Ratio



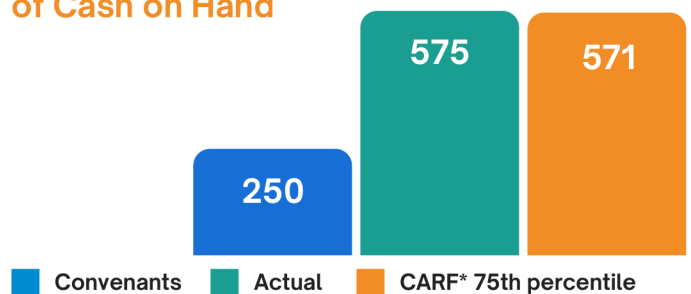
This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into long-term solvency. This ratio reflects the organization’s ability to fund annual debt service with cash reserves and net entrance fees.

UMRH, Inc. Cash to Debt Ratio



This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into the long-term solvency. This ratio measures the organization’s position with available cash and securities to its long-term debt.

UMRH, Inc. Days of Cash on Hand



This is a “Liquidity” ratio focusing on cash and investments and providing insight into meeting short-term (one year) cash needs of ongoing operations. The ratio measures the number of days of operating expense covered by cash and cash equivalents.

* Commission on Accreditation of Rehabilitation Facilities

The United Methodist Retirement Homes, Inc., Its Affiliate and Subsidiary

Consolidated Balance Sheet
September 30, 2023

ASSETS

Current Assets

Cash	\$5,177,988
Contributions receivable, current portion	25,846
Investments	88,037,087
Assets limited as to use, current portion	6,636,490
Accounts receivable, net of allowance for uncollectible accounts (\$184,000)	3,890,546
Other receivables	2,516,922
Inventories	231,303
Prepaid expenses and other current assets	<u>1,293,484</u>
Total current assets	<u>107,809,666</u>

Non-Current Assets

Assets limited as to use, net of current portion	27,097,658
Investments - restricted	8,771,194
Property and equipment, net	222,348,613
Trusts receivable	125,130
Deferred marketing costs, net	87,012
Interest rate swap agreements	<u>11,565,561</u>
Total non-current assets	<u>269,995,168</u>
Total assets	<u>377,804,834</u>

LIABILITIES AND NET ASSETS

Current Liabilities

Annuity payable, current portion	63,319
Bonds payable, current portion	5,410,000
Accounts payable	4,473,013
Accrued salaries and related expenses	2,257,501
Accrued interest payable	1,764,449
Total current liabilities	<u>13,968,282</u>

Long-Term Liabilities

Annuity payable, net of current portion	395,706
Bonds payable, net of current portion	154,830,169
Liability for refundable advance fees	14,651,478
Deferred revenue from non-refundable advance fees	80,652,605
Deferred revenue - other	6,500
Funds held for others	86,572
Total long-term liabilities	<u>250,623,030</u>
Total liabilities	<u>264,591,312</u>

Net Assets

Without donor restrictions	99,508,415
With donor restrictions	13,705,107
Total net assets	<u>113,213,522</u>
Total liabilities and net assets	<u>377,804,834</u>

The United Methodist Retirement Homes, Inc., Its Affiliate and Subsidiary

Consolidated Statement of Operations and Changes in Net Assets.
For the Year Ended September 30, 2023

REVENUES, GAINS, & OTHER SUPPORT WITHOUT DONOR RESTRICTIONS

Net resident and patient service revenue	74,866,988
Amortization of advance fees	11,303,173
Net assets released from restrictions	507,997
Other	226,830
Interest and dividend income	<u>4,262,978</u>
Total revenues, gains and other support	<u>91,167,966</u>

EXPENSES

Nursing services	22,725,837
Dietary and food services	13,989,657
Administration	12,882,601
Plant operations, maintenance and security	7,985,358
Laundry and housekeeping	4,372,621
Resident services - activities	2,779,061
Home care	2,802,557
Interest	3,448,221
Depreciation and amortization	14,346,183
Loss on disposal of property and equipment	6,904
Bad debt expense	<u>927,265</u>
Total expenses	<u>86,266,265</u>
Operating income	<u>4,901,701</u>

NON-OPERATING GAINS (LOSSES)

Net investment gains, realized	2,092,460
Net investment gains (losses), unrealized	1,925,979
Contributions	74,141
Construction related marketing costs	(64,458)
Change in fair value of interest rate swap agreement	1,123,353
Other	<u>(84,936)</u>
Net non-operating gains	<u>5,066,539</u>
Excess of revenues, gains and other support over expenses	9,968,240
Net assets released from restrictions for purchase of property and equipment	<u>242,697</u>
Change in net assets without donor restrictions	<u>10,210,937</u>

CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS

Contributions	721,569
Interest and dividend income	328,028
Net investment gains, realized	193,142
Net investment gains, unrealized	693,319
Change in split interest agreements	106,993
Maturity of split interest agreement	40,640
Change in value of pledges	26,154
Bad debt (recovery)	(2,720)
Net assets released from restrictions	<u>(750,694)</u>
Change in net assets with donor restrictions	<u>1,356,431</u>
Change in net assets	11,567,368
Net assets, beginning of year	<u>101,646,154</u>
Net assets, end of year	<u>113,213,522</u>

Croasdaile Village

DURHAM, NC
Heather March, Executive Director

Events & Community Life

Our dining services and life enrichment departments had a fall festival to ring in the new season and enjoy traditions like games, hayrides, pumpkin decorating contest, live music, photo opportunities with spouses, employees, and friends, and indulgence in some delicious seasonal treats. The festival was talked about for weeks after the event and appeared to be a new favorite for residents.



Pictured above on the left is Robert Brawley, (President of our Residents' Association), and his wife Jane.

Pictured above on the right are leadership members of our Dining Services department. (From left to right: Wanda Manzueta, Tishonda Williams, Adam Neil, Janessa Shaw, and Andrew Harrington)

Wellness is Growing at Croasdaile Village

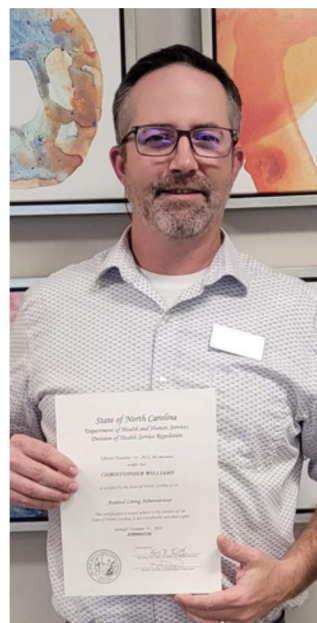
Our wellness program has a holistic approach to health. Informed by the Life Care Services 8-Dimensions of Wellness program, residents are encouraged to work on many aspects of living well, including adopting a healthy diet, regular exercise, maintaining an active and social life, coping with stress, and establishing a sustainable lifestyle. Our exercise program is designed to help residents improve functional fitness by building strength, flexibility, endurance, and balance, to reduce the risk of falls, and enhance our residents' quality of life. Residents are now offered on-going senior fitness testing to assess each type of functional fitness. Based on the results, residents are provided with recommendations to improve or maintain function by attending exercise classes, personal training, or physical therapy. Since August, Margie Pacher, Wellness Director, has assessed 55 residents. Other programs offered have included Get Control: 8-Week Exercise Intervention for Urinary Incontinence, balance clinics, monthly fitness challenges, and Wellness Education presentations. The Wellness Committee has played a big part in making a successful wellness program by leading walking events, volunteering for a variety of department needs, and collaborating on future plans. Margie continues to work with her supervisor, Rebecca Marion-Grady, Associate Executive Director, on additional ways to enhance the 8-Dimensions of Wellness program.

Community Benefit: \$21,450

This figure represents the services provided to the greater community by Croasdaile Village.

Benevolence Provided: \$3,776,720

Croasdaile Village provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.



Awards & Accolades

In April, 2023, Christopher Williams started in his role as Director and Terrica Bobo accepted the role of Resident Care Coordinator, both within Assisted Living and Memory Care at Croasdaile Village. Chris also attended Administrator in Training (AIT) training in Des Moines, Iowa with LCS to advance towards attaining his administrator license. In November of 2023, after passing the AIT exam in September, Christopher Williams attained his Administrator License for Assisted Living in the state of North Carolina.

To provide people looking for guidance on Continuing Care Retirement Communities (CCRC's) with a comprehensive resource for informed decision making, Statista and Newsweek partnered for the first time to award the leading 250 America's Best CCRC's 2024 in the US. The 20 states with the most CCRC's were included in the ranking.

To create the ranking, a score was calculated for each CCRC that was part of the analysis. The total score is based on national online surveys of medical professionals and acquaintances of residents/residents living in CCRCs and accreditation data.

Croasdaile Village was ranked #23 in the nation and #3 in the state of North Carolina as a community. The Croasdaile Village Health Center (Pavilion) was ranked #2 in the state of North Carolina as a nursing home with a population of 100-149 beds.

The Health Center continues its adherence to a 5-star rating, in accordance with Centers for Medicare and Medicaid Services (CMS) standards with a great annual survey in February.

Photo top left: Sign guiding participants to Croasdaile Village's Annual Alzheimer's Community Walk. Photo top right: Christopher Williams proudly displays his Assisted Living Administrator's license. Photo bottom left: The Pavilion Health Center Team celebrates a Team Appreciation event.

Community Benefit

Each year, residents and employees of Croasdaile Village come together to raise funds for the Alzheimer's Foundation. This effort is very near and dear to our hearts. Alzheimer's has touched each of us, both personally and professionally, in some way. Our annual walk is a way to honor those who currently suffer, remember those we have lost, and to hopefully pave the way forward with treatment options to cure this disease. Our annual goal each year is to raise \$5,000.00 and this year, as in past years, through efforts like our annual Craft Sale, Soup, Bread and Bake Sales and Campus Walk, we have met and exceeded this goal.



Community Life

As a community, we take our commitment to resident satisfaction and engagement seriously. That's why we embarked on an extensive search for a new resident portal in 2023 that could better meet the needs of our community.

After vetting 12 different options and consulting with our Residents' Communications Committee, Craig Lloyd, Director of Communications, and Jeff Swain, Director of IT, worked with Heather March, Executive Director to transition to a new resident portal called Touchtown. We understand that switching to a new platform is a significant change for everyone involved, which is why we wanted to ensure that the new portal we selected was the best possible fit for our community.

The Touchtown portal stood out for several reasons, including its user-friendly interface, mobile compatibility, and range of features designed to enhance resident engagement. One of the most important factors in our decision-making process was the feedback we received from our Residents' Communications Committee and other communities. We value the opinions and insights of our residents, and the committee was instrumental in helping us identify the features and functionality that were most important to them.



Pictured above on the left: Janice Schulke displays her card making skills. Photo top right: the Village Viols featuring CV residents Fritz and Carolyn Coolidge. Photo bottom right: Jonathan Perkins, CV IT, assists Susan Blanchard with a variety of technological needs.

Residents now have access to a wider range of communication tools, allowing them to stay informed and engaged with community news and events. The platform is also fully optimized with 365 days of 24-hour customer service, so downtime for the platform will be minimized. Perhaps most excitingly, the Touchtown portal is designed to foster greater connectivity and socialization among residents with features like Alexa integration and dynamic social calendars that will be phased in over the first year of the launch. Our team made sure residents had ample support and guidance throughout the process. We hosted training sessions and workshops to ensure that residents were comfortable and confident when using the new platform, and our support team continues to be on hand to answer any questions or concerns.

In late 2023, Craig Lloyd also worked with Touchtown on an employee portal, and we expect to roll out a new family member portal using the same system in mid-2024.



Cypress Glen

GREENVILLE, NC
Laurie Stallings, Executive Director

Resident Life

Cypress Glen started a clinic program for Independent Living residents, funded in part as intended by the Brown Family gift. The “Convenient Care Clinic” will provide onsite low acuity and urgent care. Residents will pay an enrollment fee of \$1,000 per year, which will be a pass-through to the physician, Dr. Mark Cervi. The goal is to have 150 participants and will be piloted for 6 months to build the subscription base. Currently there are approximately 90 residents enrolled in the clinic, and satisfaction is very high. In anticipation of the new clinic services, the space received a facelift this year to provide a bright, upscale look. The new space was redesigned to provide private, comfortable patient areas, as well as more efficient workspaces for staff.

Dining services added two new features to the dining program, much to the delight of the residents. To elevate the dining experience at Cypress Glen, dining services introduced a Chef’s Special program. In addition to the current customizable menu options, the Chef’s Special is a daily plated entrée curated by the dining team at Cypress Glen. The elevated dishes are a great option for the growing population of adventurous resident foodies and promote creativity among the dining team. That creativity is also evident during planned theme nights in the dining room and the popular pop-up restaurant events in Fred’s Oasis.

Dining Services Director, Brent Riggs, hosted a number of beer and wine tastings in Fred’s Oasis and introduced a series of craft cocktail classes, instructing residents how to make the unique drinks themselves. Favorite cocktails included a berry margarita, caramel apple mule, pumpkin spice martini, and a watermelon Pimm’s cup.



Pictured above is the redesigned Brown Family Clinic, made possible by the Brown Family gift.

Highlights in Life Enrichment this year included a musical tribute to the late Tony Bennett and a summer variety show featuring nearly 40 talented residents and staff members playing musical instruments and singing. A Broadway Review Showcase later in the year also featured the talents of residents and staff members and drew a large audience. Cypress Glen’s outstanding music programs are always popular with current and future residents.

Community Benefit: \$737,700

This figure represents the services provided to the greater community by Cypress Glen.

Benevolence Provided: \$571,900

Cypress Glen provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.



Spiritual Life & Community Support

Cypress Glen's Spiritual Life continues to thrive! Worship services each Sunday average between 60-65 in attendance, sometimes exceeding 70. The community's choir was very active with 22 members and six lay leaders who helped to lead worship. We continue to enhance technological capabilities in our weekly worship service for those who are unable to attend in person. Three additional worship services are also offered weekly in memory care, assisted living and skilled care with an average total attendance of 20 residents in these areas. Local pastors from the Catholic, Episcopal, and Disciples of Christ churches come to Cypress Glen to offer monthly worship services. Several pastors from the local area visit with their parishioners who live at Cypress Glen, allowing residents to stay connected with their home church. Year to date, we average monthly offerings of approximately \$4,200, totaling \$55,000 for the year. These funds are distributed to 17 community organizations in the Greenville-Pitt County area in October. Several residents continue to volunteer at the Joy Soup Kitchen each month, donating over 420 hours throughout the year. In addition to worship, giving, and serving opportunities, we have at least six spiritual formation small groups, initiated and lead by our residents, which offer opportunities for them to pray, study, fellowship, and grow in their faith together. The Spiritual Life resident committee has grown in numbers and gatherings are well-attended. All of this good news is a testament to the spiritual enthusiasm that is evident at Cypress Glen. We are looking forward to the new ways God's Spirit will stir among us in 2024!

Five outdoor workout stations were added to the walking trail located behind the Wellness Center. These stations incorporate other forms of exercise to enhance outdoor walking. Two new wellness classes were added to the calendar this year. Senior Strength helps keep residents fit and strong using their body weight and hand weights. Stretch and Balance in the Pool similarly works to on strength and balance for those who prefer water exercise.



Photo top left: Cypress Glen resident Paula Kermon is an active participant in Life Enrichment's popular musical variety shows. *Photo bottom left:* Cypress Glen's new Independent Living Convenience Care Clinic opened in October 2023 with a grand ribbon cutting and celebration. Pictured are resident Casey Wensing, Clinic Director Dr. Mark Cervi, and Executive Director Laurie Stallings.

Cypress Glen was presented with the Silver Award from Life Care Services for participation in the training program called Heartfelt Connections Memory Care Program, an LCS Signature Experience. Designed to help residents maintain a sense of purpose, satisfaction, dignity, and quality of life, the program focuses on the individual residents and their abilities. Presented to the community in February, the award level is based on criteria met in the previous year.

Team Cypress Glen participated in the 2023 Walk to END Alzheimer's, with resident and staff combined contribution of \$6,297 to the national Alzheimer's Association. Fundraising events this year included team t-shirt sales, monetary donations, and an outdoor concert with live music, food, and fun.

Cypress Glen filed its annual Community Benefit Plan for 2023. Over the course of the year, Cypress Glen served as a training site for East Carolina University students in Recreational Therapy, Music Therapy, Nursing, Social Work, Health Services Management, Occupational Therapy, and the Brody School of Medicine. Students from local high schools, Pitt Community College, and UNC Wilmington also completed course work at Cypress Glen to satisfy requirements for graduation.



Staff Accolades

After 29 years of exemplary service to Cypress Glen, Sarah Everette, RN, retired in March from her role as Director of Health Services. Trey Hayes, hired in December 2022, was named Health Care Administrator. Trey has operated as a licensed nursing home administrator since 2014 and loves the opportunity to continuously serve, learn, and grow. Additionally, Tanya Little, RN, was hired in March and assumed the role of Director of Nursing. She came to Cypress Glen with nearly 20 years of nursing experience and almost 8 years in skilled nursing care.

In September, Ben Blanton, Director of Health Navigation, became a fully Licensed Clinical Social Worker. Before successfully taking the exam in August, Ben had to complete the required 3,000 hours of clinical work and 100 hours of clinical supervision. Both Cypress Glen social workers provide services and support for residents, and their families. They assist residents when there is a need for additional support in the form of medical equipment, caregivers, or home health.



Photo above: Cypress Glen celebrated her 36th Anniversary with an outdoor concert. Pictured are Health Care Administrator Trey Hayes, Executive Director Laurie Stallings, Executive Assistant/Director of Communications Anna Holloman, Director of Life Enrichment Lisa Thomas, and Director of Nursing Tanya Little. *Photo top right:* Cypress Glen loves the East Carolina University Pirates! Showing their support are residents Lindy & Ed Daughtry

Morgan Reese completed a 34-week administrator training program and passed the NC & National licensure exams, earning her license as a nursing home administrator. In October, Morgan was promoted from Memory Care Administrator to Associate Administrator. This new role is an expansion of her responsibility as the Memory Care Administrator.

In 2023, five CNAs from the Memory Care team completed training and were promoted from certified nursing assistants to certified medication aides. In November, Andrea Blango, RN, was promoted from Assisted Living Charge Nurse to Memory Care Nurse Manager/Clinic Coordinator.



Pictured above: Cypress Glen held the official ground-breaking for the expansion of 57 new Independent Living apartments. Pictured above are Cypress Glen Leadership Team and then members of the LCS Development Team, UMRH & Cypress Glen Executive Directors, SB&A Architects, Board of Trustee members, Frank L. Blum construction team members, and local city officials.

Marketing, Sales, & Expansion

Marketing staff kept busy in 2023, achieving 100% sold status five times, growing the waitlist exponentially, and maintaining high sales and occupancy throughout the year. Cypress Glen and LCS Development worked diligently to finalize plans for the Independent Living expansion and extensive campus renovation plans. In June, the Board of Trustees and NCDI (North Carolina Department of Insurance) gave approval to accept deposits for the new apartments, and marketing staff began meeting with families to convert priority reservations to sales. A festive ground-breaking ceremony took place on a beautiful sunny day in October with the development team, local city officials, residents, staff members, and depositors in attendance to celebrate the exciting growth of Cypress Glen. By year's end, marketing had accepted 47 deposits for the 57 new apartments, which are expected to be complete late 2025 to early 2026.



Photo top left: Cypress Glen current and future residents and invited guests enjoyed the ground-breaking ceremony, as well as sweet treats to celebrate the occasion. Photo bottom left: Artist rendering of the attractive new addition at Cypress Glen, to include the South Wing with 57 IL apartments, a grand auditorium, and a restaurant-style dining venue.

Wesley Pines

LUMBERTON, NC
Amy Shooter, Executive Director

Community Benefit

Known for being a community partner, Wesley Pines has formed bonds with several organizations to promote goodwill and networking within Lumberton and Robeson County. Team members participate as Ambassadors for the Lumberton Chamber of Commerce sponsoring the Lumberton Area Chamber of Commerce Annual Golf Tournament and the Christmas Parade. Wesley Pines offers meeting spaces for two local Girl Scout Troops, Second Time Around band practice, and The Oaks Homeowner's Association meetings. During the 2023 year, Wesley Pines collected 205 pounds of peanut butter and jelly for the Robeson County Church Community Center and hosted a food and clothing drive for the North Carolina Children's Odom Home. Wesley Pines was a sponsor for the 2023 Fayetteville Walk to End Alzheimer's.

Wesley Pines has partnered with local education institutions to offer clinical teaching space for future healthcare workers. Partnerships include the University of North Carolina at Pembroke, Robeson Community College, and the Public Schools of Robeson County. All three institutions have used the community as hands-on learning sites to educate nursing students and certified nursing assistant students. On some days, all three entities held clinicals in the health center.

Photo top right: Wesley Pines staff dressed in purple to show their support of Alzheimer's Awareness Month.



Healthcare

Wesley Pines partners with Eventus Whole Health to provide primary care and mental health services to community residents. Dr. Sandeep Patel served as Medical Directors for the community since April 2022. In April 2023, Dr. Patel relinquished his duty to Dr. Anoop Sheth. Dr. Sheth is onsite once weekly to provide expedient care to residents across campus.

After increasing occupancy in the health center, nurses and administration realized the need to begin utilization of Medication Aides to allow nurses time to provide treatment and documentation for residents. The inaugural Medication Aide class yielded eight Medication Aides who passed their exams and have now begun assisting our nurses on medication administration. This has increased nursing team job satisfaction tremendously and helped increase the care residents receive.

Community Benefit: **\$53,288**

This figure represents the services provided to the greater community by Wesley Pines.

Benevolence Provided: **\$1,075,568**

Wesley Pines provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.



On January 26, 2023, the health center reached a huge milestone of 100% OCCUPANCY. This mark was reached due to the teamwork and focus of the entire staff of the community and focus of Jessica Stanley, who serves as the Healthcare Admission Director. The team celebrated with a pizza party for all staff members to recognize the momentous occasion.

Administration

In March 2023, Stephanie Ward traveled to Florida to complete her Heartfelt Connections Master training. After receiving her training, she led a series of training sessions that included modules for community staff and created life stations to enrich the lives of residents affected by dementia. In October, Ashland Moore, Assistant Director of Nursing and Amy Shooter, Executive Director, attended Heartfelt Connections Master training hosted at Croasdaile Village.

Amy Jo Rooks was hired as our new Social Service and Navigation Director on August 7th. She is a lifelong Lumberton native and obtained a bachelor's degree in social work with a minor in Medical Sociology in 2008 from UNC-Pembroke. Amy Jo most recently served as a Community Alternatives Program Case Manager for three years providing home health services for adults with disabilities in Robeson and surrounding counties. Amy is excited for this new opportunity working with residents at our community where her father has been a resident since 2019, so Wesley Pines is already like family to her.

One major achievement for Wesley Pines was the creation of the campus' first employee scholarship. Mrs. Maxine L. Amos, who is a retired educator and resident of independent living, created The Louie M. and Maxine Locklear Amos Scholarship. Mrs. Amos was inspired to help a Wesley Pines staff member who wants to pursue a career in healthcare. The award winner was Miss Alaysha Cummings who has worked as a Certified Nursing Assistant at the community for several years. Alaysha was accepted into the Physical Therapy Assistant program at Fayetteville Technical Community College in the Fall of 2023 and remains a part-time employee.

Wellness & Community Life

To start the new year off on the right foot, Wesley Pines hosted their third Health and Wellness Fair in January 2023. The fair was open to residents, their families, prospective residents, as well as employees. The event had nearly thirty vendors and was a whopping success.

Volunteer development continued during the year with Chair Yoga for residents taught by a Certified Yoga Instructor as well as visits from a Great Pyrenees therapy dog named Sadie. A Volunteer Banquet was held in April to honor all community volunteer members for their contributions.

Through a series of projects that included replacing hospital beds and other pieces of equipment, the community was able to donate items that had outlived their usefulness. These items were given to local charitable organizations. Wesley Pines also functioned as a collection location for Operation Christmas Child.



Photo top left: Inaugural Louie M. and Maxine Locklear Amos Scholarship award winner Alaysha Cummings, CNA, shown with Mrs. Maxine Amos. **Photo top right:** Awning being installed to provide shade for the Lantana patio. **Photo bottom right:** Wesley Pines team dressed in pink to support Breast Cancer Awareness Month.



Our Community Life Services Director has taken residents on shopping and dining excursions over the past year, hosted a Quilt Trunk Show featuring one of our resident’s quilts, hosted local author Kammeron Polverari, held a Library for the Blind presentation, dancing groups, and local bands. Some of the most memorable events over 2023 included the UNCP Garden Party, the movie Sound Of Freedom at Hometown Theater, Lunch at Dales Seafood at Lake Waccamaw followed by a Depot Museum excursion, Boys & Girls Country Store, Lunch at Olive Garden in Fayetteville, Scenic trip to White Lake, Lunch at Pier 41 Seafood, Rev. Mangum’s 90th Birthday Party at Mt. Olive Pentecostal Church in Pembroke, numerous Mystery Rides, as well as monthly birthday parties.

Wesley Pines traditionally celebrates National Nursing Home Week but added National Assisted Living Week celebration in 2023. The week began with a ‘Merica Monday car show, themed dress attire for each day of the week, a talent show, and an Assisted Living Open House.

Awards and Accolades

The community was recognized with a “Safeties” Safety Award Honorable Mention by LCS in August. Communities worthy of honorable mention for having losses less than the established 2022-23 target not to exceed limit but did not experience losses greater than 10% of target achieved this recognition.

Life Care Services’ SalesFIRST approach focuses on developing a sales culture in which topline revenue is prioritized thus enabling the community to serve more seniors, exceed client expectations, and deliver on our promise. During the annual LCS SalesFIRST Scorecard review, Wesley Pines received a score of 99 which was the highest score in the LCS Region.

Events & Community Impact

After a three-year hiatus, Wesley Pines hosted Shaggin’ Under the Pines. This longstanding community event was warmly received and attended by residents, their families, and prospective residents. Kendrix Singletary, who serves as the Artist in Residence at the Carolina Civic Center, was the entertainment for the outdoor concert and refreshments were available by Sunset Slush.

Wesley Pines has continued to work with LCS Development to create a dedicated rehab wing to reposition community as area’s provider of choice for rehabilitation. This project would also encompass an enlargement to the Fisher Dining Room and assisted living activity room while making the library a dual-functioning private dining space. There are also plans for a billiards room addition to the Ruby D. McMillan Fellowship Center. SFCS completed an onsite visit on August 31st to discuss the project followed by the signing of a pre-construction agreement with Blum Construction. The scope of the expansion plan has been finalized with the next step in early 2024 to include an onsite visit for schematic design.



Photo top: Wesley Pines Health Center residents and staff enjoying an Easter Egg Hunt. Photo bottom right: ‘Merica Monday Car Show was held during National Assisted Living Week.

Wesley Ridge

LUMBERTON, NC
Robin Sagendorph, Manager



Wesley Ridge is a 24-unit one- and two-bedroom apartment community located adjacent to the Wesley Pines campus in Lumberton, N.C. Wesley Ridge is a division of UMRH Affordable Housing.



Wesley Ridge Advisory Board above: Back Row, Left to Right: Mr. Jonathan Erickson, UMRH Corporate Executive Director; Ms. Barbara Andrews, Member; Mr. Mark Horton, PPM Director of Property Management, Ms. Teresa Lawson, PPM Property Manager; Ms. Marie Williams, PPM Maintenance Caretaker. Front Row, Left to Right: Ms. Phyllis Pate, Member; Ms. Amy Shooter, Wesley Pines Executive Director; Ms. Clyde McKee, Member; Ms. Robin Sagendorph, PPM Site Manager. Not pictured: Ms. Melissa Humphrey, Member.
Photo top right: Wesley Ridge apartment.

The Wesley Ridge community has six, one-story buildings constructed of wood frame, vinyl siding, and brick veneer. Each building contains four apartments: Three one- bedroom units of approximately 625 square feet and one two-bedroom unit of approximately 840 square feet. Wesley Ridge is open to senior adults age 62 and older and to persons 18 years of age and older with disabilities. To become a resident, persons must earn no more than 60% of the median income in Robeson County, N.C. This translates into approximately \$29,100 for a single person and \$33,240 for a couple. Residents of Wesley Ridge have access to Wesley Pines Health Center should the need arise. The community is managed by Partnership Property Management (PPM), of Greensboro, N.C., and Florence, S.C. The community has an Advisory Board which meets twice annually. Robin Sagendorph is the manager of the community, and Mrs. Teresa Lawson is the property manager. Admission is on a first-come, first-serve basis. Applicants must pass a security check, drug test, and credit check.

Contact Information on How to Become a Resident

Croasdaile Village

Danielle Brown
Marketing Director

2600 Croasdaile Farm Pkwy.
Durham, NC 27705
(919) 384-2476

DanielleB@umrh.org
www.croasdailevillage.org

Cypress Glen

Elizabeth Jenkins
Marketing Director

100 Hickory St.
Greenville, NC 27858
(252) 830-7066

ejenkins@umrh.org
www.cypressglen.org

Wesley Pines

Kimberly Walters
Marketing Director

1000 Wesley Pines Rd
Lumberton, NC 28358
(910) 272-3006

kimberlyw@umrh.org
www.wesleypines.org

Wesley Ridge

Robin Sagendorph
Manager

990 Wesley Pines Rd.
Lumberton, NC 28358
(910) 618-0361

wesleyridge@partnershipppm.com
www.umrh.org/wesley-ridge

Celebrating a Year of Thoughtful Giving



Caleb W. Baker

UMRH Director of Development

As the year draws to a close, we reflect on the incredible achievements and heartwarming moments that have made the United Methodist Retirement Homes a truly special place to call home. Central to our success in creating vibrant and caring communities is our commitment to philanthropy and benevolent care.

We are proud to present our annual report, showcasing the impact of your generosity and the outstanding achievements of our residents, staff, and volunteers. This report is a testament to the spirit of compassion and support that permeates every corner of our communities.

One of the integral components of our mission is the provision of benevolent care to those residents experiencing financial challenges. Through the generosity of our donors, we have been able to ensure that every resident, regardless of their financial circumstances, receives the high-quality care and services they deserve. This year, your contributions have made a remarkable difference in the lives of those in need. In addition, your support has allowed us to enhance the overall experience for every resident.

From renovating communal spaces to upgrading amenities, your generosity has had a transformative impact on the quality of life within our communities. Through your contributions, we have been able to create an environment that promotes engagement, well-being, and happiness.

We extend our deepest gratitude to each and every one of you who have contributed to this success whether it's from your time, talent, or treasure. Your unwavering support has helped shape the lives of those in our communities, ensuring that they continue to thrive and experience a fulfilling and meaningful retirement.

Thank you for your continued support and belief in our mission. We are excited for the possibilities that lie ahead and the impact we can make together.

Two Gifts of Note

This year marked the first year of awarding of the Louie M. and Maxine Locklear Amos Scholarship at Wesley Pines. This scholarship was funded by the Louie M. and Maxine Locklear Amos Endowment.

One of our residents, who was extremely active with the Foundation, Beulah Latta, passed away in 2022. Her estate provided a six figure gift to support the Croasdaile Village Benevolent Care Endowment Fund.

About the Foundation

Gifts to the UMRH Foundation provide funds to improve life at our communities in ways large and small. For example, the Foundation has funded gardens and sanctuaries to enhance the beauty of our campuses. Foundation giving has also supported building upgrades and the construction of new buildings. For residents who've exhausted their financial means, the Foundation offers benevolence support to help cover the cost of care. For employees who are continuing their education, the Foundation administers resident-funded scholarship programs.

The United Methodist Retirement Homes Foundation endeavors to enhance the quality of life of current and future residents through projects funded by donor contributions for The United Methodist Retirement Homes, Inc., Wesley Pines, Cypress Glen, and Croasdaile Village. Donors contribute to our commitment to all aspects of wellness at our communities. The majority of these gifts support benevolent care for those residents who can no longer fully pay for their care; and to support special programs at the above-named communities.

The UMRH Foundation, UMRH and the three communities are grateful to all donors of gifts small and large who have enhanced the art of living at our retirement communities through their giving. In Fiscal 2023, donors gave gifts totaling \$417,958 with \$313,738 coming in as new gifts, \$32,800 as payment on pledges, \$27,140 from the UMRH Golf Tournament, \$26,000 from the NC Conference of the United Methodist Church gift, and \$18,270 from the Annual Mother's Day Offering.

The UMRH Foundation is fortunate to have several scholarship funds for the benefit of employees at our communities. By helping employees further their education, the overall quality of staff members improves, thus providing benefits to residents and their quality of life. Residents can have satisfaction in knowing that they are having a positive impact on the lives of employees who will have a better life through education. Thank you to those who support our scholarship funds!

Photo top Right: UMRH Development Specialist, Angie Pegram, Board Member, Nancy Van Antwerp and Wesley Pines Executive Director, Amy Shooter, don safety gear for a tour of the Heritage Building in advance of its opening



Scholarships

Croasdaile Village Scholarship

Dr. Jack Fassett and the late Betty Fassett, Croasdaile Village residents, established the John D. Fassett Endowment for Croasdaile Village Employee Scholarships in 2001. Since this scholarship's inception, 169 scholarships have been awarded for a total of \$189,000. Beginning in 2016, Dr. Fassett increased each award from \$1,000 to \$1,500 to account for inflation since the first awards were made in 2004. Other residents have made significant contributions to the fund over the years so that no qualifying applicant would be rejected. We are grateful to Jack and the late Betty Fassett and to residents who have made gifts to make these awards possible!

Fassett Recipient: Kay Garcia-Perez

The late Dr. Garland Knott established the Kathleen Knott Scholarships in Healthcare Education in appreciation for the loving care his late wife, Kathleen, received in the Pavilion Healthcare Center in 2004. Since this scholarship's inception, 80 scholarships have been awarded for a total of \$47,025. Dr. Knott, who was a Croasdaile Village resident, contributed \$1,800 every year to fund three scholarships. He funded these annual gifts through a charitable gift annuity (CGA), giving him excellent tax advantages and payout rate. The CGA remainder was used after his death to establish the Garland and Kathleen Knott Scholarships in Healthcare Education Endowment. Other donors give to the scholarship fund so that no qualifying applicant is turned down. Earnings from the Endowment will also fund scholarships.

Knott Recipient: Dawn Williams

The Matthews Scholarship awards are made possible by Mrs. Kathleen Matthews and other Croasdaile Village resident donors and was founded in 2013. Since this scholarship's inception, 38 scholarships have been awarded for a total of \$38,000. Matthews Scholarships are open to qualifying employees enrolled in any curriculum as approved by the UMRH Foundation Scholarship Committee. The Late Mr. & Mrs. Edward C. & Betty M. Matthews made provisions through a charitable remainder trust to fund the Edward C. and Betty M. Matthews Employee Scholarship Endowment.

Matthews Recipients:
Jemimah Kutin and Kay Garcia-Perez

Cypress Glen Scholarships Recipients: Laurie Maloney, Serenity Martin, Kimberly Clapp, Madison Bowen

The Cypress Glen Employee Scholarships were awarded in August in the amount of \$750 each. These scholarships are funded by gifts from Cypress Glen management, senior staff and residents. The Cypress Glen Residents' Association made a major gift in support of these scholarships.

The Vera and Chip Pennington Employee Scholarships are planned for December. Mr. Pennington funded the Vera and Chip Pennington Employee Scholarship Endowment through a charitable gift annuity remainder.

The Margaret Mansfield Employee Healthcare Scholarships established by the family of the late Margaret Mansfield has been a great resource for employees of Cypress Glen.

The Ernest & Marjorie Wright Staff Education & Training Endowment is up and running at Cypress Glen. The late Marjorie and Ernest Wright were longtime residents of Cypress Glen who wanted to have a lasting impact on their community. They did this through a very significant gift specified in their estate plan. The purpose of the endowment is to provide for staff education and training, including an employee scholarship program.

Wesley Pines Scholarship Amos Recipient: Alaysha Cummings

Our newest scholarship is the Louie M. and Maxine Locklear Amos Scholarship at Wesley Pines. This scholarship provides assistance to employees of Wesley Pines, who are pursuing further education. Our recipient for the first year was Ms. Alaysha Cummings, who studies in the physical therapy assistant program at Fayetteville Tech Community College.



We welcome anyone who would like to contribute to this worthy cause to please do so by contacting our office.

UMRH Golf Tournament

In 2023, we held our 24th annual UMRH Golf Tournament and raised over \$20,000 in funds to support Benevolent Care. The tournament was at Hillandale Golf Course and started with an early morning greeting, coffee and doughnuts, and some golf motivation from Croasdaile Village Resident, Bucky Waters. Thank you to all who played, sponsored, or helped out at this fun-filled event! *Please be in touch if you or your company would like to sponsor a hole for our 25th annual tournament on October 21st, 2024.*



Photo above: Croasdaile Village Resident, Rev. Bob Wallace, with his family and long time sponsors of the Golf Tournament.

Get Involved

Here are a few ways to support the mission of the Foundation: Many donors make outright gifts of cash, securities, and other assets for projects that improve the quality of life of residents. Among the projects are benevolence, employee scholarship funds, capital projects, life enrichment, and campus beautification.

Make a current gift:

- Write a check to UMRH and designate in the memo line where you would like those funds to be utilized.
- Give a gift of appreciated stock and not have to worry about capital gains.
- You can direct moneys from your required minimum distribution (RMD) of your retirement account directly to the Foundation as a qualified charitable distribution, therefore avoiding any tax liability on those funds.
- Time to part with your car? Let us take care of it for you. From time to time, we receive a car from a resident and post the car for sale internally within the community so that an employee can buy it. It's a win-win-win. You get to write off the value of the automobile, the employee gets reliable transportation at an affordable price, and we get funds to support benevolent care.
- Naming opportunities are available to those who wish long-term recognition of friends or loved ones. Naming's can be associated with physical facilities, or with endowment funds, scholarship funds, and other non-physical assets.
- Unrestricted gifts are the most flexible type of support, allowing Trustees to approve them for use where needed most.

Consider a future gift:

- Consider adding UMRH as a beneficiary in your will, IRA, or life insurance policy.
- Set up a Charitable Gift Annuity through the Foundation that will provide you with a guaranteed income, tax benefit, and a donation to the Foundation later on.
- Work with your estate attorney to create a Charitable Remainder Trust. UMRH acts as a trustee to several trusts and also acts as a beneficiary to several others.

Useful Verbiage for Estate Planning:

This year, many people have contacted the Foundation requesting example verbiage for planning their wishes for their estates. Below, you can find sample wording. We would be happy to work with you if you needed additional wording for a more specific gift.

“I give, devise, and bequeath to the United Methodist Retirement Homes Foundation (EIN # 56-1870172), a nonprofit located in Durham, N.C., the sum of [\$\$ amount (or a percentage)] of my estate. It is my request that this gift be used for the benefit of the [Name Campus or UMRH] [Name Specific Donor Purpose/ Benevolent Care Endowment or Unrestricted Fund].”



— Loss of Jo Brown —

We lost a dear friend and benefactor to UMRH this past year. Jo Brown had a love for Cypress Glen and it's residents. We all have Jo Brown stories, I'm sure. My fondest one was when she and I were talking about the organ in the auditorium and I asked if she knew how to play. She said, "Yes, I can play The Phantom of the Opera." I told her if she would play it before our next local committee meeting that I would dress up like the phantom and dance around and so began our friendship.

Donor Thanks

Your generous donations have been a great support to The UMRH, Inc., communities for 2022-2023.

OCT. 1, 2022 THRU SEPT. 30, 2023

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The United Methodist Retirement Homes, Inc. Thanks You for Your Generous Donations!

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The Foundation and its volunteers and staff representatives always consider the interests of the donors as the first priority in planning gifts. Information learned by any representative of the Foundation about a donor or the donor's assets or philanthropic intentions is held in strict confidence. It is neither the province of the Foundation nor its volunteers or staff to give legal, accounting, tax, or other advice which is usually reserved to the donor's counsel while acting on the donor's behalf.

DONOR BILL OF RIGHTS

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on the organization's governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgment and recognition.
- To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*
- To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.
- *UMRH and UMRH Foundation do not share mailing lists.



Our 2023 Back Cover Features:
*Croasdaile Village Resident,
Barbara Self, shows her
appreciation to Dee Dee Lynch,
Medical Assistant, in the Clinic.*

“Have you included The United Methodist Retirement Homes Foundation in your will or living trust?”

UMRH.ORG

Ways to Give:



Pledges



Estates



Cash



Real Estate



Stocks



Wills



CGA*



In Kind



CRT*

*CGA: Charitable Gift Annuity

*CRT: Charitable Remainder Trust

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