



Enhancing Mind, Body, and Spirit At Croasdaile Village

Featuring enhanced gathering, dining, aquatics, fitness, therapy, recreation, and wellness spaces



**A Case for Support Document
for the
Croasdaile Village Two-Year Capital Campaign
2018-2019
Dr. Brian Gentle and Mr. Gary Whaley, Co-chairs**

About Croasdaile Village

Mission Statement

The Mission of Croasdaile Village Retirement Community, 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.

Benevolence

Croasdaile Village provides benevolence assistance to residents who spend down their resources and who can no longer fully pay for their care. The total benevolence provided in 2016 was \$3,931,341.

Civic Engagement

As a not-for-profit organization, Croasdaile Village has a mission of giving back to the community and helping others. Through financial and in-kind services, donations, volunteerism, and the hosting of community events on our campus, Croasdaile Village has been able to serve hundreds of people from all walks of life regardless of income, background, health or disability.

Management

Croasdaile Village, a Life Plan Community located in Durham, N.C., is related by faith to the North Carolina Conference of the United Methodist Church. Life Care Services, a national leader in senior housing, and UMRH, Inc. manage the community.

From the Executive Director



Mr. Howard DeWitt

Greetings from Croasdaile Village! My name is Howard DeWitt. I have the honor and privilege to serve as the executive director of this innovative and proactive community located in Durham, North Carolina. I am pleased to share with you a wonderful opportunity to build enhanced gathering, dining, aquatics, fitness, therapy, recreation and wellness spaces on our campus. These enhancements will provide a constant, conscious pursuit of living life to the fullest potential. We believe that these enhancements are synonymous with the lifestyle we offer. I am very excited about this new opportunity.

While the well-being of Mind, Body, and Spirit is already a prevalent concept in the daily

routines of our residents, our new spaces will enable residents to reach their highest potential. Our residents can enjoy gracious living by sharing a concert featuring the concert grand in our new auditorium, enjoying a delightful new dining experience, going for a dip in the pool, working out in the new state-of-the-art fitness center, or enjoying the new outdoor recreation area. We are sure that residents will find that these beautiful new spaces provide lifelong learning, fitness and gracious living opportunities, providing all that they look for in retirement living. Our professional team will be available to assist our residents to achieve their entertainment, educational, health, and wellness goals. These new amenities, which are being strategically placed in our community, are designed to be environmentally responsible with efficient use of resources. We are anxious for our current and future residents to be able to live life to the fullest. Thank you for your interest and for helping us achieve our goals!

From the Co-chairs



Gary Whaley, Esq.

We are honored to co-chair the “Enhancing Mind, Body, and Spirit” capital campaign for Croasdaile Village. It is gratifying to support the building of new spaces where individuals can be “engaged in life.” We are avid supporters of Croasdaile Village and the community’s commitment to “Enhancing Mind, Body, and Spirit.” Both of us are past chairs of The United Methodist Retirement Homes Board of Trustees, and have been pleased to be part of this excellent organization that is the governing body for Croasdaile Village. The executive director, Howard DeWitt, is a caring leader whose vision for Croasdaile Village grows and evolves to address



Dr. Brian Gentle

the needs of each new generation of senior adults. We believe that a healthy mind, body, and spirit are essential to quality of life. While it is important to treat those who are ill, it is also important to maintain health and strive to improve the quality of life for all residents. The capital campaign seeks to help offset the cost of the new spaces for enhanced living by raising \$4M. We look forward to working with our capital campaign team and with you, our donors, over the next two years to achieve this goal. Your gift will have a lasting effect on generations to come.

Background

Croasdaile Village has been a part of Durham since 1999. Croasdaile Village’s predecessor, Methodist Retirement Community, began accepting guests at its Erwin Road community in 1955. Many residents moved from that historical community to Croasdaile Village when it opened. Under the leadership of Executive Director, Howard DeWitt, Croasdaile Village

has grown in size and prestige. Located on over 110 acres of a former dairy farm, Croasdaile Village blends a calming rural atmosphere with city convenience. The community has views of native hardwoods, meadows, and a private lake with walking paths: a perfect scene of North Carolina's natural beauty.

For those of you who are unfamiliar with the term "Life Plan Community" (formerly continuing care retirement community), it is the term used to describe multiple levels of living styles and multiple levels of care. Croasdaile Village features independent living, independent living with personal assistance, assisted living, and skilled nursing. Thus Croasdaile Village is able to provide a "continuum of care" for residents who live there.

Croasdaile Village enjoys the reputation of being one of the premier retirement communities in North Carolina. Known for its friendly, welcoming, and hospitable environment, Croasdaile Village is a sought-after place to live. From its beginnings in 1999, the community has continued to grow and re-invent itself for each new generation of senior adults. In 2004-2007, Croasdaile Village expanded, adding additional independent living apartments and cottages, a chapel, gardens and many other amenities.

Now it is time to grow again, to meet the needs of seniors who are retiring earlier, living longer and requiring more active opportunities. That is why we are planning these new "centers of excellence."

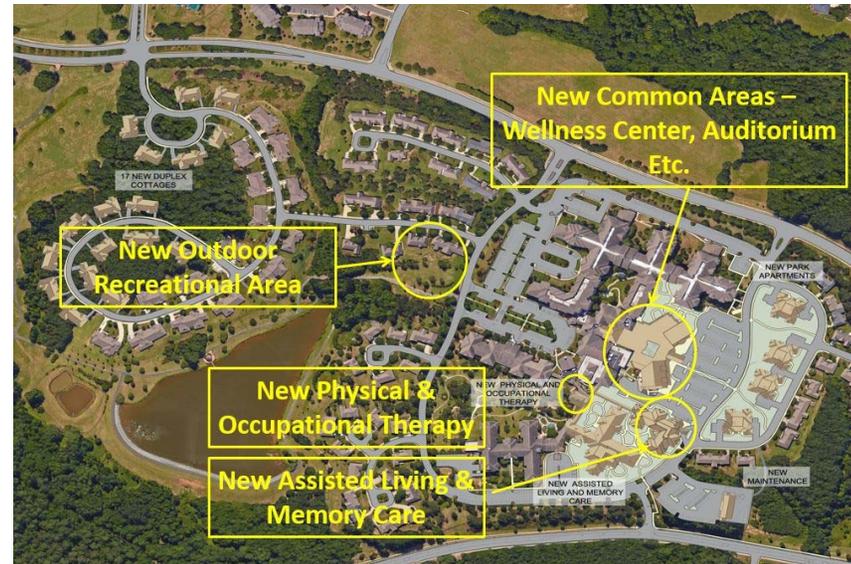
Phase One construction, which began in January 2017, includes fifty-eight new cottages and villas.

Phase Two of the expansion approved by our Board of Trustees will include these new amenities:

- A new Wellness Center with swimming pool, hot tub, and a spa will increase the size and scope of wellness options for our residents, helping them achieve and maintain a wholesome, healthy lifestyle.
- A larger Auditorium will enhance the scope of the concerts and educational programs we can provide
- Additional dining venues will increase the variety and enjoyment of dining and entertainment options.
- A new physical and occupational therapy center will enable state-of-the-art treatments

The expansion architectural firm (SFCS) has produced design documents and renderings that appear in this Case for Support. We expect Phase Two construction to begin in early 2018. In order to help defray Phase Two costs, Trustees have approved a capital campaign described herein with a goal of \$4,000,000.

Aerial View of Phase Two Enhancements



Why the Campaign

The fundamental objective of The Croasdaile Village “Enhancing Mind, Body, and Spirit” campaign is to raise the \$3,337,000 differential between the \$4,000,000 goal and the \$663,000 in gifts that are on hand for the project. We also hope to publicize plans for new amenities, new services, and new programs to residents, future residents, and citizens of the Durham area. We believe these enhancements will continue to keep Croasdaile Village at the leading edge of Triangle retirement communities.

The campaign will find success through leadership of the Croasdaile Village Capital Campaign Committee, UMRH Board of Trustees, the UMRH Capital Campaign Director, the UMRH Director of Development and Church Relations, other Development staff, and the Croasdaile Village team.

The Campaign Committee sincerely asks help from our prospective donors: Board of Trustee members, resident and non-resident individuals, private and public foundations, companies and corporations, professional partnerships, churches and faith-based organizations, Croasdaile Village employees, UMRH and Croasdaile Village volunteer organizations, and others.

The goals of the campaign are to:

1. Secure additional funding of \$3.337M over a three-year timeframe for the enhanced gathering, dining, aquatics, fitness, therapy, recreation, and wellness spaces
2. Raise awareness among residents and non-residents of the improved quality of life that the enhancements will bring

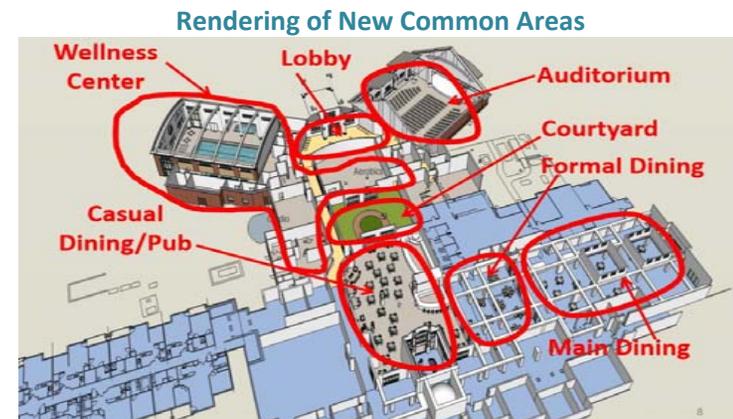
Goals will be met by:

1. Executing a two-year campaign for soliciting gifts
2. Allowing pledge payments over three years
3. Accepting income-producing gifts such as charitable gift annuities and charitable trusts
4. Providing tribute opportunities through naming of spaces and through donor board recognition

Overview of the New Common Areas

New common areas included in the Phase Two expansion are:

1. The Wellness Center
2. **The Jack and Betty Fassett Auditorium**
3. **The Nance Lobby**
4. **The Residents’ Association Courtyard**
5. Casual Dining
6. Formal Dining
7. Main Dining



The Wellness Center

The Wellness Center will offer these amenities and activities to residents, their guests, and employees:

- State-of-the-art Aquatics Center and *The Dottie and Bucky Waters Hot Tub*
- *The Betsey & David Miller Aerobics Room*
- *The Betty Fassett Exercise Room*
- Therapeutic and Recreational Aquatics Programs
- Massage Room
- Spa and Beauty Salon
- Healthy Living Programs
- Life-long Learning Programs

“If exercise could be packed into a pill, it would be the single most widely prescribed and beneficial medicine in the nation.” ~ Robert N. Butler, former director of the National Institute on Aging.

Rendering of the Aquatic Center



The Jack and Betty Fassett Auditorium

Among the improvements that the new auditorium brings are:

- Increased capacity (seats 350) over the existing Ponder Auditorium (seats 205)
- A Steinway Model B seven-foot grand piano pledged to the campaign, enhancing the quality of performances and entertainment
- State of the art audio-visual systems that allow interconnection with Few Chapel, Ponder Auditorium and resident homes.
- Accommodation of the increased resident population

Rendering of the Auditorium



Rendering of Auditorium, Lobby & Wellness Center Façades



Enhancing Mind, Body, and Spirit

Enhanced Dining

Residents and their guests will enjoy three dining venues that offer a variety of dining options:

- Casual Dining with pub and snack services
- Formal Dining with wait service
- Main dining with buffet service



advanced hydrotherapy therapy pool provides the ultimate rehabilitation advantage to Croasdaile Village. Its functional design has all the features required for effective therapy, rehabilitation, and fitness:

- Employs self-contained underwater treadmill devices
- Utilizes warm-water therapy as a medium to enhance rehabilitation and performance through water's buoyancy
- Provides resistance and hydrostatic pressure
- Delivers ambulatory hydrotherapy treatment

Rendering of the New Pub/Casual Dining Room



Other Improvements

Among the other improvements in the Phase Two expansion are:

- A new physical and occupational therapy wing that includes a therapy gymnasium and an aquatic therapy pool
- An assisted living addition that includes memory support plus refurbishment of our current assisted living
- An outdoor recreational area that will accommodate a variety of activities not currently available at Croasdaile Village (Rendering at left)

The

Rendering of the New Carol Eilber and Paul Scagnelli Aquatic Therapy Pool



Range of Gifts Needed to Achieve the Campaign Goal

Gift Categories	Gift Level	Number of Gifts	Amount at Level	% of Goal	Cumulative Total	Number of Naming Opportunities*	Donor Board Level
Lead Gifts (9) 55%	\$750,000	1	\$750,000	18.75%	\$750,000	1 Naming	Founder
	\$525,000	1	\$525,000	13.13%	\$1,275,000	1 Naming	Founder
	\$250,000	1	\$250,000	6.25%	\$1,525,000	1 Naming	Founder
	\$150,000	2	\$300,000	7.50%	\$1,825,000	2 Namings	Founder
	\$100,000	4	\$400,000	10.00%	\$2,225,000	4 Namings	Founder
Major Gifts (10) 10%	\$50,000	4	\$200,000	5.00%	\$2,425,000	4 Namings	Benefactor
	\$30,000	1	\$30,000	0.75%	\$2,455,000	1 Naming	Patron
	\$25,000	6	\$150,000	3.75%	\$2,605,000	3 Namings	Patron
Special Gifts (68) 16%	\$20,000	8	\$160,000	4.00%	\$2,765,000		Patron
	\$15,000	9	\$135,000	3.38%	\$2,900,000	1 Naming**	Patron
	\$10,000	19	\$190,000	4.75%	\$3,090,000	2 Namings	Patron
	\$5,000	30	\$150,000	3.75%	\$3,240,000		Friend
General Gifts (Many) 2%	Under \$5000	Many	\$97,000	2.43%	\$3,337,000		Friend over \$1,000
On Hand (17%)			\$663,000	17%	\$4,000,000		

* Note: Many pre-expansion naming opportunities are available at all naming levels for gifts to the campaign. Contact the Campaign Staff for more information.

** This naming is actually for \$13,000 for the hot tub.

Naming Opportunities

<i>Named Area</i>	<i>Naming Value</i>
LOBBY	\$50,000 (Reserved)
OUTDOOR COURTYARD	\$25,000 (Reserved)
AUDITORIUM	\$750,000 (Reserved)
THE WELLNESS CENTER	
Wellness Center Complex	\$525,000
Pool/Aquatics Center	\$250,000 (Reserved)
Aerobics Room	\$50,000 (Reserved)
Exercise Room	(Pre-expansion Naming)
Women's Locker Room	\$10,000
Men's Locker Room	\$10,000
Beauty Parlor/Spa	\$30,000
Hot Tub	\$13,000 (Reserved)
CASUAL DINING/PUB	\$100,000 (Reserved)
BUFFET DINING	\$100,000
FORMAL DINING	\$50,000
PHYSICAL & OCCUPATIONAL THERAPY	
Gym	\$150,000
Aquatic Therapy Pool	\$50,000 (Reserved)
ASSISTED LIVING	
Wing	\$150,000
Memory Care	\$100,000
Movie Theatre	\$25,000 (Reserved)
Bistro	\$50,000
Beauty Parlor	\$50,000
OUTDOOR RECREATION AREA	\$25,000 (Reserved)
Picnic Shelter	\$10,000 (Reserved)
DOG PARK	\$10,000
MARKETING SUITE	\$25,000
MAINTENANCE BUILDING	\$25,000
RAISED-BED GARDEN	\$10,000

Managing the Campaign

The cost of managing the campaign will be funded through existing Croasdaile Village and UMRH Corporate office budget line items for staff personnel and programs. Naming opportunities that are available are shown to the left. The table above shows the range of gifts being sought.

This Case for Support outlines the enrichments that The Croasdaile Village “Enhancing Mind, Body, and Spirit” campaign will bring to a community already known for providing excellence in retirement living. The enhancements are being developed, funded and managed using methods consistent with those that residents and constituents have come to expect from Croasdaile Village. Through dedicated campaign committee members, staff, and supporters, a significant portion of the project will be funded through execution of a gift plan whose goals and objectives are presented in this case statement.

The Campaign Committee

Explore making a gift by contacting a member of the Campaign Committee or a member of the staff.

Campaign Co-chairs

Dr. Brian Gentle
Past UMRH Board Chair

Gary Whaley, Esq.
Immediate Past UMRH Board Chair

Croasdaile Village Resident Members

Dr. Jack Carroll
Past Residents' Association President
Duke University Professor, Retired

Dr. Woody Mason
Retired Dentist

Mrs. Betsey Miller
Past Residents' Association President

Ms. Sharron Nance
Retired Research Biochemist

Ms. Barbara Pray
Residents' Association President
2017-2018

Mr. Bucky Waters
Retired Duke University Vice
Chancellor for Development & Past
Basketball Coach at Duke and West
VA University

Non-Resident Members

Douglas Koenig, Esq.
Elder Law Attorney

Anthony (Tony) Nicholson, Esq.
Estate and Trust planning and
Administration

Mr. Steed Rollins
Real Estate Sales and Marketing

Honorary Members

Mr. and Mrs. Marvin Barnes
UMRH Heritage Campaign Co-chairs

Mr. Jonathan Erickson
UMRH Corporate Executive Director

Dr. Jack Fassett, Croasdaile Village
Resident, Retired Appellate Attorney
and Retired Business Executive

Rev. Carol Goehring
Superintendent, Corridor District of
the NC Conference

Mr. Carl Hamill
Past UMRH and UMRH Foundation
Board Member and Retired Business
Owner

Mr. Lee Harriss, CFA
UMRH Foundation Board Chair

Mrs. Willie Johnson
Two-time past Residents' Association
President & Retired School Teacher

Mr. Artie Rogers, CPA
UMRH Board of Trustees Chair

Dr. Gray Southern
Superintendent, Capital District of the
NC Conference

Bishop Hope Morgan Ward
Resident Bishop, The United
Methodist Church, NC Conference

Staff

Mr. Howard DeWitt
Croasdaile Village Executive Director

Mr. George Deaton
UMRH Capital Campaign Director

Mr. Caleb Baker
UMRH Director of Development

Mrs. Cheryl Miller
UMRH Development Specialist

Summary

This Case for Support outlines how new programs and facilities for enhancing mind, body, and spirit will bring unparalleled offerings to a community already known for providing excellence in retirement living. The enhancements are being developed, funded and managed using methods consistent with those that residents and constituents have come to expect from Croasdaile Village. Through dedicated campaign committee members, staff, and supporters, a significant portion of the cost of Phase Two of the expansion project will be funded through execution of a capital campaign gift plan whose goals and objectives are presented herein.

How to Reach the Team

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Mr. Caleb Baker, UMRH Director of Development

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Mrs. Cheryl Miller, UMRH Development Specialist

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Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I.** 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.
- II.** 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.
- III.** To have access to the organization's most recent financial statements.
- IV.** To be assured their gifts will be used for the purposes for which they were given.
- V.** To receive appropriate acknowledgement and recognition.
- VI.** To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII.** To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII.** To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX.** To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*
- X.** To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

The Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP) and The National Association of Charitable Gift Planners, formerly the Partnership for Philanthropic Planning

* The United Methodist Retirement Homes does not share mailing lists.



Croasdale Village Retirement Community

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www.umrhgift.org



Enhancing Mind, Body and Spirit