



UMRH

ANNUAL REPORT

THE UNITED METHODIST
RETIREMENT HOMES, INC.

2020

umrh.org



THE MISSION

of The United Methodist Retirement Homes, Inc., a faith-based, non-profit continuing care organization, is to provide quality care and services for an inclusive and diverse population of senior adults.



EXECUTIVE DIRECTORS

Pictured above, left to right:

Howard DeWitt, Croasdaile Village; Wade Rozier, Wesley Pines;
Laurie Stallings, Cypress Glen; Jonathan Erickson, UMRH Corporate.

UMRH CORPORATE OFFICE

2600 Croasdaile Farm Pkwy., Ste. A-500, Durham, NC 27705
(919) 384-3010 • www.umrh.org • www.umrhgift.org
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EDITORS and CONTRIBUTORS

Jonathan Erickson, Caleb Baker, Stacy Dobson, Cheryl Miller, George Deaton - Croasdaile Village Campaign Director,
Howard DeWitt, Heather March, Laurie Stallings, Anna Holloman, Elizabeth Jenkins, Wade Rozier, Amy Shooter

Front Cover Photos (clockwise starting from top left photo): Wesley Pines resident Margaret Watts exercising; Croasdaile Village residents Fred and Ruth Porter enjoying a glass of wine; Prospective resident Josephine Chance enjoying a day on the Cypress Glen campus; Cypress Glen resident Ann Whitehurst adds the finishing touches during a dinner party.

Back Cover Photos (clockwise starting from top left photo): Croasdaile Village residents Fred and Ruth Porter ready to hit the road on their motorcycle; Joan Taylor calling the shots in the Cypress Glen game room; Cypress Glen resident Jim Gray enjoying a swim in the community's beautiful saltwater pool; Wesley Pines resident Vivian Davis painting.

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Artie Rogers
UMRH Board
Chairman

It is our pleasure to introduce to you the 2020 Annual Report.

This was a year like no other. In the beginning of the year, it felt as if we had the wind at our backs and looked forward with great anticipation. Little did we know what the year would bring us, impacting all of our lives. We applaud the leadership and dedication of our executive directors, their department directors and teams and our corporate office personnel working tirelessly in providing services and care to our residents despite the numerous hurdles faced by the pandemic. “Heroes Work Here!” and “We Got This!” were frequent phrases. Throughout the year, we remained focused on the safety, health and well-being of our residents and staff. We also appreciate the great resources of Life Care Services (LCS), our management partner. LCS was instrumental, especially



Jonathan Erickson
UMRH Corporate
Executive Director

in the early days of the pandemic, securing much needed supplies, operational programs, policies and guidance. We congratulate LCS on receiving the J.D. Power award for Highest in Customer Satisfaction among Senior Living Communities for a second year in a row. 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 and to thrive, grow and serve our residents and employees.



**#1 IN CUSTOMER SATISFACTION WITH
INDEPENDENT SENIOR LIVING
COMMUNITIES 2 YEARS IN A ROW**
FOR J.D. POWER 2020 AWARD INFORMATION, VISIT JDPOWER.COM/AWARDS

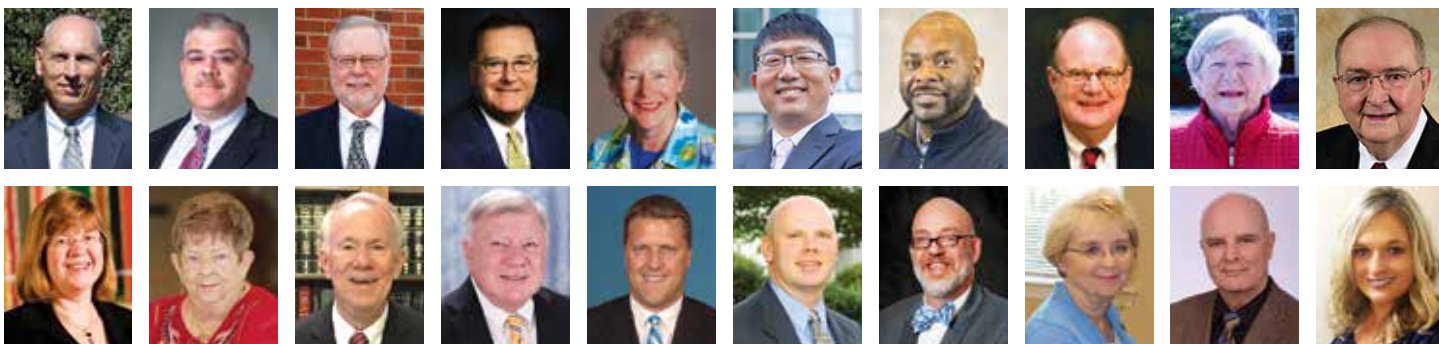
We are truly appreciative of all the thank yous, well wishes and support provided by residents, family members and others to our staff. Our resident volunteers continued to stay engaged and are essential to the over-all resident experience and satisfaction. Many of our residents serving on committees such as Spiritual Life, Building and Grounds, Life Enrichment and Wellness, to name a few, continued to meet through conference and video calls. As we are interconnected to the communities where we reside, we feel that we should “give back” and are called to serve our communities. Although somewhat scaled back during the pandemic, our communities continued to serve through our support programs.

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 and Cypress Glen expansions, to continued high standards for resident care and maintaining our Fitch BBB status, which demonstrates continued financial stability, to our terrific resident-centered enrichment programs.

Our organization also benefits greatly from the financial contributions of the many residents, family members, corporations, The North Carolina Conference, United Methodist churches, and others. These contributions play a significant role in our ability to provide benevolent care and improve resident life.

We are also grateful for the faithful service and leadership of Howard Dewitt. Howard began as the Methodist Retirement Community/Croasdaile Health Care Administrator in April 1999 and was promoted to Executive Director in May of 2000. In conjunction with a dedicated team, he oversaw the many challenges of opening a new community, stabilization, increasing resident services, and continued growth and expansion. He will certainly be missed, as he will retire in December 2020.

UMRH AND FOUNDATION BOARD OF TRUSTEES AND DIRECTORS



Top Row – Left to Right: Artie Rogers, UMRH Board Chairman; Tom Steele, Treasurer; Jerry Gambill, Secretary; Dr. Richard Evans; Nancy Van Antwerp; Rev. Paul Lee; Carl Hardy; Lee Harriss; Ruth Read, Wesley Pines Residents’ Council President; Earl Powell, Croasdaile Village Residents’ Council President. **Middle Row – Left to Right:** Kathryn Bradley; Jo Brown, Cypress Glen Residents’ Council President; Bruce Jobe; Michael Hardin; Jonathan Erickson, UMRH Corporate Executive Director; Stacy Dobson, UMRH Chief Financial Officer; Caleb Baker, UMRH Director of Development;

Colleena Clark, UMRH Recording Secretary; Howard DeWitt, Croasdaile Village Executive Director; Heather March, Croasdaile Village Associate Executive Director. **Bottom Row – Left to Right:** Laurie Stallings, Cypress Glen Executive Director; Wade Rozier, Wesley Pines Executive Director, Rebecca Marion Grady, Croasdaile Village Healthcare Administrator. **Not Pictured:** John Link

YEAR-END FINANCIALS

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



Stacy Dobson
UMRH Chief
Financial Officer

Mrs. Amanda Ziegler, of Dixon Hughes Goodman LLP, presented the audit report for UMRH for the fiscal year, ending September 30, 2020, to the UMRH Board of Trustees. She 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.

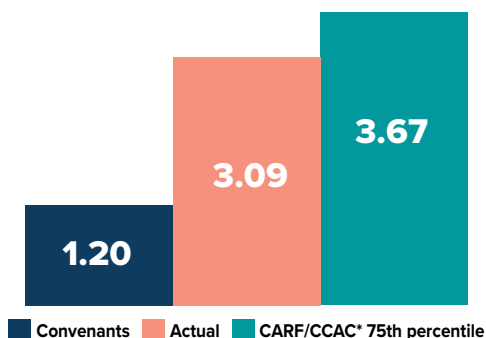
Covenants: “Covenants” are agreements UMRH has with its lenders. The covenants require UMRH to have a minimum of 250 days cash on hand and a 1.2 times debt service ratio coverage. UMRH’s covenants require they have a 35% cash to debt ratio. The chart below shows that all of these requirements are met.



A beautiful rainbow appeared right after the Croasdaile Village Health Center’s COVID-19 section was empty for the first time. According to Rebecca Marion Grady, Healthcare Administrator, it felt like a promise that everything was going to be okay.

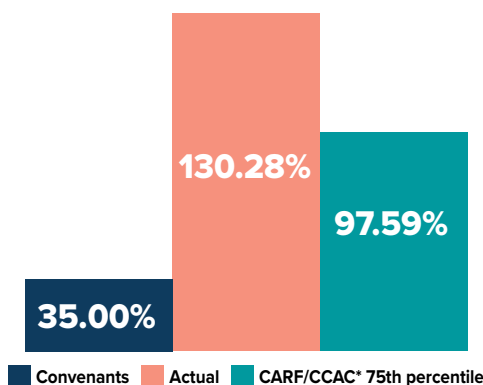
2020 FINANCIAL ACHIEVEMENTS

UMRH, Inc.
Debt Service Coverage Ratio



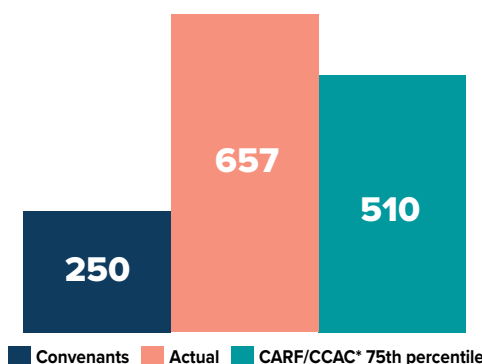
This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into long-term solvency. This ratio reflects the organization’s ability to fund annual debt service with cash reserves and net entrance fees.

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/Continuing Care Accreditation Commission

**The United Methodist Retirement Homes, Inc.,
Its Affiliate and Subsidiary
Consolidating Balance Sheets
As of September 30, 2020**

ASSETS	
Current Assets	
Cash	\$5,663,881
Contributions receivable, current portion	49,685
Investments	81,866,211
Assets limited as to use, current portion	3,052,646
Accounts receivable, net of allowance for uncollectible accounts	2,235,159
Other receivables	2,739,540
Inventories	139,029
Prepaid expenses and other current assets	1,085,104
Total current assets	<u>96,831,255</u>
Non-Current Assets	
Assets limited as to use, net of current portion	39,941,382
Investments - restricted	7,975,444
Assets held for resale	215,296
Property and equipment, net	200,818,964
Trusts receivable	144,997
Deferred Costs, net	130,685
Total non-current assets	<u>249,226,768</u>
Total assets	<u>346,058,023</u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Annuity payable, current portion	105,664
Bonds payable, current portion	4,345,000
Accounts payable	3,986,865
Accrued salaries and related expenses	2,885,734
Accrued interest payable	2,743,272
Provider relief advanced funding	1,425,674
Total current liabilities	<u>15,492,209</u>
Long-Term Liabilities	
Annuity payable, less current portion	660,264
Bonds payable, less current portion	144,816,632
Liability to other foundations	7,714
Liability for refundable advance fees	13,707,147
Deferred revenue from non-refundable advance fees	72,508,136
Funds held for others	124,431
Interest rate swap agreement	377,025
Total long-term liabilities	<u>232,201,349</u>
Total liabilities	<u>247,693,558</u>
Net Assets	
Without donor restrictions	88,209,888
With donor restrictions	10,154,577
Total net assets	<u>98,365,465</u>
Total liabilities and net assets	<u>346,058,023</u>

**The United Methodist Retirement Homes, Inc.,
Its Affiliate and Subsidiary
Consolidating Statement of Operations and
Changes in Net Assets Information
For the Year Ended September 30, 2020**

REVENUE	
Net resident and patient service revenue	63,617,176
Amortization of advance fees	9,216,218
Net assets released from restriction	251,556
Other	68,723
Interest and dividend income	2,848,608
Total unrestricted revenues, gains and other support	<u>76,002,281</u>
EXPENSES	
Nursing services	16,872,756
Dietary and food services	9,809,173
Administration	11,132,481
Plant operations, maintenance and security	6,167,996
Laundry and housekeeping	3,658,278
Resident services - activities	2,704,408
Home care	3,446,646
Interest	3,275,570
Depreciation and amortization	11,833,029
Bad debt expense	155,917
Total expenses	<u>69,056,254</u>
Operating income (loss)	<u>6,946,027</u>
NON-OPERATING GAINS / (LOSSES)	
Net investment gains, realized	1,131,325
Net investment gains, unrealized	3,150,291
Provider relief funding	664,231
Loss on disposal of property and equipment	(64,142)
Contributions	32,134
Construction related marketing costs	(59,965)
Change in fair value of interest rate swap agreement	(158,243)
Other	(3,097)
Net non-operating gains (losses)	<u>4,692,534</u>
Excess of revenues, gains and other support over expenses	11,638,561
Net assets released from restrictions for purchase of property and equipment	1,572,349
Change in net assets without donor restrictions	<u>13,210,910</u>
CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	
Contributions	1,530,679
Interest and dividend income	243,029
Net investment gains	533,839
Change in split interest agreement	46,439
Change in value of pledges	(252,504)
Recovery of bad debt (bad debt expense)	27,123
Net assets released from restrictions	(1,823,905)
Change in net assets with donor restrictions	<u>304,700</u>
Change in net assets	13,515,610
Net assets, beginning of year	<u>84,848,855</u>
Net assets, end of year	<u>98,364,465</u>



CROASDAILE VILLAGE

DURHAM, NC | HOWARD DEWITT, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$32,579

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

BENEVOLENCE PROVIDED: \$3,303,634

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

CROASDAILE VILLAGE had a long year thanks to the COVID-19 pandemic, and we are looking forward to 2021. More detailed information will be shared below regarding our experience and responses to COVID-19. We have had so many positive things occur this year that it was sometimes hard to believe that we were in the middle of a pandemic.

We completed our new assisted living building and moved 36 residents into their new apartments. The following areas were also completed this year and most of them are already in use, with social distancing of course:

- The Croasdaile Village Residents' Association Courtyard
- The Cynthia and Marvin Barnes Café and Pub
- The Cynthia and Marvin Barnes Pool/Aquatics Center
- The Jack and Ann Carroll Picnic Shelter
- The Dorothy C. Bevan Women's Dressing Room
- The Carol Eilber & Paul Scagnelli Therapy Pool
- The Jack and Betty Fassett Auditorium
- The Jim & Penny Lore Clinic
- The Dave and Betsey Miller Aerobics Room
- The Judith L. Moore Theatre
- The Nance Lobby

- The Village Bistro by Sharron Nance
- The George W. Newton Dog Park
- The George and Mary Newton Residents' Workshop
- Sparks Park
- The Azalea Room by Boyd and Joan Strain
- The Bucky and Dottie Waters Hot Tub
- The Francis & Barbara Whang Presentation Stage
- The GG Zastrow Gift Shop

We rolled out our new resident portal (Viibrant) in January of this year, and it has been extremely useful during the pandemic. The system has been a big help in resident communication. Residents use it for ordering their meals, communicating with each other, and signing up for pool use. Family members have even purchased devices for their loved ones who live in our community so they can use Viibrant.

The leadership team moved the residents who lived in Friendship House into the new assisted living building in June. Then, in July, we moved residents from Heritage Hall into the new assisted living building. These moves were made more difficult as we would normally have the residents' family members present when the residents move to another location. Due to the pandemic, family

Pictured above: (left to right): Croasdaile Village residents Dick and Barbara Grambow; Croasdaile Village resident Vonnie Tolbert; Croasdaile Village residents Don and Ann Wright; Dr. Neema Sharda, Croasdaile Village Clinic Associate Medical Director.



Croasdaile Village's new Assisted Living building was completed in 2020.

assistance was not possible. The communication during a pandemic was tough during the moves, but we used Facetime and Zoom to allow residents to communicate with their family members and tell them all about their new homes. Significant planning went into the moves, and all the residents were happy in their new home.

Heather March and the Morrison Living leadership team implemented the new declining balance program this year. This program allows residents more choices and flexibility in how they spend their dining dollars. The residents are given a pre-determined amount of dining dollars each day to spend at all dining venues. We currently offer four different types of dining venues to the residents (buffet, café, fine dining, and pub) and will be adding another (bistro) in 2021.

CONSTRUCTION UPDATE

We spent much of the year working on the final Village Commons and Assisted Living design. The new Village



Croasdaile Village Executive Director Howard DeWitt reviews floor plans.

Commons expansion was ready in June, but we have not been able to utilize all the new spaces due to COVID-19. The residents have been using the Sparks Park outdoor recreation area and truly enjoy it. The Anne and Jackson Carroll Picnic Shelter is a popular location for outdoor meetings (10 or less, masked and with social distancing).

The Therapy Gym is complete, and the residents that have used it are very pleased. We have a new state of the art therapy pool in the new location. The Carol Eilber and Paul Scagnelli Therapy Pool is a high-tech pool that allows therapists to work with residents in a pool setting that has a fully adjustable floor and a variable speed underwater treadmill. The moveable floor eliminates any accessibility limitations that residents may have. The pool also has an underwater camera that allows therapists to monitor the residents' activity if they are not in the pool with them or need to view the residents' motions under water. We are fortunate to have a therapy pool that most communities like ours do not have. These pools have historically been used by NFL football teams, NASA, Navy Seals, hospitals,



Croasdaile Village residents enjoyed the new Sparks Park outdoor recreation area in 2020.



The new Croasdaile Village Commons expansion was completed in June 2020.



(Left to right) Rebecca Marion Grady, Lisa Kistler and Heather March moving residents to the new Assisted Living building from Friendship House.

and local college teams such as the University of North Carolina at Chapel Hill and North Carolina State University.

The response to the new Heritage Hall replacement project has been exceptional, and all but two of the new apartments have been pre-sold.

SURVEY SUCCESSES

The NC Department of Health and Human Services (DHHS) performed seven infection control surveys in the Health Center in 2020. Our team has done a wonderful job in following CDC guidelines and did well on each survey. The Durham County Department of Public Health also surveyed the Health Center and reviewed our COVID-19 policies and practices. They were extremely satisfied with our plan and the organization of the COVID-19 wing.

Due to COVID-19, we have not had our annual recertification and life safety surveys for the Health Center.

COVID-19 from Beginning to End of the Year

We began discussing COVID-19 issues with residents on March 2, 2020. Then, restrictions were put in place on March 9, cancelling all major campus meetings. We followed this up one week later on March 16 by closing all external gates and screening everyone entering the campus. On that date, we also opened a Command Center, and having closed the dining rooms, we began meal deliveries to all residents. All congregate gathering areas were closed on March 16. We also closed the Pavilion and

Friendship House to all guests. At this time, all personnel were asked to wear facemasks while on campus.

Although we have not been able to have groups in our community and have had very limited abilities to do anything in the community around us due to COVID-19, we have still been able to come up with creative ways of communicating with the residents and providing activities with small groups when we can.

As this report is written, we continue to be delighted that our efforts, and God's blessings, have enabled us to only have a handful of COVID-19 cases since it became an issue 11 months ago. We look forward to seeing what our new "normal" will be and hope to see our residents, family members, board members, and community friends again soon without using Facetime, Zoom or Microsoft Teams.

This was a year of changes for our community leadership team. Our Clinic Director, Cheryl Bennett, was in a tragic automobile accident in October and is recovering. We lost a couple of key department heads, but we are very excited about the team members who have returned to our team, such as Josh Brown, who is now our Home Care Director.

EXECUTIVE DIRECTOR RETIRES

After 21 years with the community, Howard DeWitt will retire on December 18. Heather March was promoted to the Executive Director position and Rebecca Marion Grady was promoted to the Associate Executive Director position. The Croasdaile Village Residents' Council honored Howard DeWitt with a donation to the Croasdaile Village "Enhancing Mind, Body, and Spirit" Capital Campaign and with naming the Village Commons Front Lobby in his honor.

Article written by Heather March, Croasdaile Village Associate Director.



(Left to right) Toni Thomas, Howard DeWitt, Heather March, and Jonathan Erickson.



CYPRESS GLEN

GREENVILLE, NC | LAURIE STALLINGS, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$306,861

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

BENEVOLENCE PROVIDED: \$671,155

Cypress Glen provides benevolent assistance to residents who, through no fault of their own, can no longer fully cover their expenses.

CYPRESS GLEN Spiritual Life community embraced the year 2020 as a summons to faith. The COVID-19 pandemic, with its restrictions on gathering for worship, meetings, and service opportunities, was an invitation to focus on faith and trust in God, while looking outward to those in our community who are most needy. We have been thankful for the gift of technology which enabled us to broadcast our weekly worship services and spiritual book studies. A prayer basket outside Brown Chapel allowed us to share prayer requests and thanksgivings during worship services. In March, we distributed \$8,300 of our Sunday offerings to 18 charitable organizations in Pitt County. The Mother's Day offering raised \$4,790. In June and September, we distributed an additional \$12,052 in a more targeted way to charitable organizations, meeting basic needs for food and shelter of those affected by the pandemic. In the midst of a challenging time, we have learned to bear each other's burdens. We look to 2021 with hope for the future.

As a proud Sponsor of the Alzheimer's Association Walk to End Alzheimer's, Cypress Glen participated in fundraising events for the seventh straight year. A t-shirt design contest and sale, flower memorial, and direct contributions combined to total \$4,017. Cypress Glen's seven-year contribution is \$26,368. "Walk to End

Alzheimer's" is the world's largest event to raise awareness and funds for Alzheimer's care, support, and research.



Resident Dick Drach and Executive Director Laurie Stallings with a donation for Food Bank of Central and Eastern NC.

When Cypress Glen resident Dick Drach heard about the pandemic's impact on food insecurity, he spearheaded a campus food drive to benefit the Food Bank of Central and Eastern North Carolina. Thanks to Drach's efforts and the generosity of residents and staff, approximately 600 food items and over \$1,000 in monetary donations were collected.

In early December, Cypress Glen supported Ron Ayers Motorsports as they sponsored a Toy Run to collect toys

Pictured above: Cypress Glen Emergency Team doing whatever it takes to keep their residents safe.

for Toys for Tots and canned goods for the Food Bank of Central and Eastern North Carolina. The Community Foundation of NC East provided Santa Claus and his elves, who joined the motorcycle parade through the Cypress Glen campus. Residents donated toys, canned goods, and monetary gifts to support the efforts.

LET US ENTERTAIN YOU

In the early months of 2020, Life Enrichment filled the calendar with wonderful on- and off-campus opportunities for activities. Residents enjoyed trips to DPAC and ECU music, theater, dance, and athletic programs. Residents enjoyed a festive Super Bowl party, outings to local and regional restaurants, and a Valentine's Day concert with the Moonlight Swing Band.

When COVID-19 dictated restrictions on off-campus travel, Life Enrichment focused on engaging residents with a variety of activities that could be enjoyed while still following the safety protocols. With the help of Cypress Glen talent, the Life Enrichment team organized educational in-house programs for small groups and televised on CGTV. Current residents presented on their career and personal experiences in pediatric medicine, dermatology, sleep programs, cosmology, and worldwide travel. The chaplain and a Cypress Glen resident led a weekly Coronavirus Conversations discussion to provide an opportunity for residents to talk about COVID-19 issues. Residents and staff participated in a CGTV variety show, providing great entertainment with music, stand-up comedy, and storytelling. Life Enrichment hosted an abundance of floating socials throughout the year, providing music and delicious food and drink.

When visitor restrictions kept residents and their families apart, Life Enrichment purchased iPads and portable stands and began connecting loved ones via Facetime, Skype, and Zoom.

Without question, one of the highlights of 2020 fell on May 8 when Cypress Glen held a special Mother's Day Parade. Due to COVID-19 visitor and off-campus travel restrictions, residents had not seen family or friends in several months. With only a few days of preparation, a drive-through parade was organized and communicated to families via email and social media. Executive Director, Laurie Stallings, and The Jolley Trolley bus led more than 200 vehicles on a route that covered every road on campus. Residents lined the way to watch as the decorated cars wove through campus, with exuberant occupants waving, hanging out the windows, and shouting greetings

to all the residents. The event far exceeded expectations and was a morale booster for residents, staff, and families during a very difficult time.

One of the many benefits of Cypress Glen residency is the weekly grocery shopping the Life Enrichment staff will do on residents' behalf. During the pandemic, this benefit was utilized exponentially. Twice each week beginning early March, the Life Enrichment staff and volunteers took resident grocery lists to Food Lion and Walmart, bought the items and then delivered the items to residences. On average, the group had 75 lists for Food Lion and 40 lists for Walmart. During the holidays, the lists nearly doubled. Additionally, the Cypress Glen staff also made bank deposits, took pets to vet appointments, picked up pharmacy items, and provided many other off campus errand requests so residents could avoid unnecessary interactions.

MUSIC TO OUR EARS

Throughout 2020, music and music therapy have played a vital role in offering opportunities for participation both in person and virtually.



Music Therapist Debbie Pitts is accompanied by resident Steve Creech in a Rosemary Clooney tribute concert.

Prior to COVID-19, local musicians, as well as ECU students and staff, provided musical concerts and music therapy sessions for our residents. A variety of musical genres were offered to meet the interests of our residents. When the pandemic up-ended normal activities, in-person and virtual sing-a-longs and concerts based on resident interests were provided each month. Direct resident participation was encouraged as COVID-19 restrictions allowed. Favorite musical activities included the Rosemary Clooney Tribute, Blues River, Favorite Hymns, an outdoor Fall Festival concert, Holiday Showcase, and Handel's Messiah sing-along.

A music program was started with board certified music therapist Debbie Pitts implementing individual and group therapeutic music sessions to address the socialization,

cognitive, emotional, physical, and spiritual well-being of residents in all levels of care. Over 130 individuals participated. This program has been especially beneficial in the prevention of isolation and supporting communication and emotional support during a particularly challenging year.

A weekly Drum Circle was created and offered both in person and virtually. More than 50 independent living residents attended throughout the year, not including those who participated virtually. Residents donated funds to purchase drums and created some drums to use at home as well. This program is enjoyed by residents in each level of care and addresses all areas of wellness in an innovative way.

HEALTH & WELLNESS

The events of the year had many residents focused on personal well-being. The Wellness Center cardio room provided residents with proper exercise equipment in the form of an elliptical machine, a wide variety of stationary bikes, pneumatic weight machines, and treadmills. The heated saltwater pool was a peaceful respite for individual swimming or a place for a vigorous workout in group aquatic classes. Daily aerobic exercise classes were led via CGTV and in small groups. The Wellness Coordinator provided a monthly wellness lecture and personalized one-on-one and small group weight-training and cardio sessions in the wellness center and in resident homes. The Cypress Glen salon provided for hair and nail services and massage therapy.

DINING

When COVID-19 safety protocols were established, the eat-in dining venues were required to close. On April 1, 2020, Cypress Glen Dining Services was challenged to provide total meal service delivery to independent living residents. Residents living in apartments were served via a room service delivery model. For those living in cottages and villas, a Meals on Wheels delivery program was established. With the assistance of loyal resident volunteers, lunch and dinner meal service was provided to cottage residents for 276 days during 2020. The resident volunteers were thankful for the opportunity to aid in the efforts and proudly logged 2,439 hours in delivering 13,800 meals.

Dining Services provided special theme meal events to include New Year's Day, Valentine's Day, Mardi Gras Dinner, St. Patrick's Day, Easter, Mother's Day, Father's Day, BBQ Southern Cook-Out prepared by our on-site Pit Master/

Executive Chef Mark Davies, July 4th, Thanksgiving and Christmas. One of the most memorable events of the Year was a shared effort with Life Enrichment — a Veterans Day event to honor Cypress Glen's veterans and spouses of veterans. A special catered breakfast was delivered to enjoy while viewing a Veterans Day program on the in-house CGTV.

Renovations began on The Stewart Café and Four Seasons room to accommodate the growing population. When unveiled in Spring 2021, the area will feature the addition of a new gathering space to include a rooftop pub called Fred's Oasis.

STAFF EXCELLENCE & TRAINING FOR THE FUTURE

The nurses and staff in long-term care/skilled nursing, assisted living, and memory care have earned extra praise this year for their loving care and attention to their residents under the most difficult of times. The challenges they have faced have been unprecedented, yet their devotion to providing superior care has never been more apparent. Staff members in each department took on added responsibilities when COVID-19 altered normal practices and procedures, working as a team to ensure the safety and well-being of the residents and the staff.

Dr. Miller Johnstone, III, was named Cypress Glen Medical Director in April 2020. Although he entered during the worst health crisis in modern history, Dr. Johnstone has proven to be an exceptional leader and compassionate physician. His support to administration has been tireless, keeping lines of communication open at all times of the day and night, making patient rounds during off hours, helping to educate and reassure staff, and giving direction for current best practices. Through Dr. Johnstone's professional network, Cypress Glen was invited to join the National Nursing Home COVID-19 Action Network, which has provided us with essential support, critical training, and technical assistance to help reduce the spread of COVID-19. Cypress Glen leadership and nursing administration have participated in a series of weekly expert and peer-to-peer meetings to facilitate this learning experience.

The World Health Organization and American Nurses Association designated 2020 as "Year of the Nurse," in honor of the 200th anniversary of the birth of Florence Nightingale. Cypress Glen Director of Health Services Sarah Everette was highlighted as a nursing superstar by Life Care Services during their Regional Health Services Division

(HSD) Leadership Conference. Joining the staff in 1994, Sarah is an excellent nurse manager, always advocating for her residents and her staff. Some may refer to Sarah as stoic because she does not overreact. Sarah pays close attention to details, yet has a strong perspective of the bigger picture.

Mike Foyles, Clinic Services Coordinator, has earned praise and appreciation for going above and beyond for our residents during the coronavirus pandemic. At a time when there was uncertainty in leaving the Cypress Glen campus, Mike became invaluable by doing resident well checks, lab draws, and connecting residents with their doctors via telehealth appointments. He coordinated for a mobile x-ray machine when needed, triaged resident health issues, and made rounds throughout the campus with the Medical Director to assist with varied medical needs. Mike also administers COVID-19 testing to residents and staff members. His desire and willingness to do what is needed has been remarkable.

When restrictions allowed, on-campus visits were permitted using proper safety protocols. A sign-up app was utilized so family and friends could schedule time to visit with residents. Outdoor visitation stations were created using rented tents and large metal carports. Tables and chairs were provided for residents to sit under cover and visitors would remain in their vehicles at least six feet away. The maintenance team upfit a gazebo so health care residents could comfortably and safely have visits with spouses and visitors. Independent living staff members and nursing provided transport for the residents to the visitation stations and sanitized between visits. Once the weather turned cold, visitation stations were created indoors using safety protocols.

Several Cypress Glen staff members are affiliated with local service clubs and volunteer their time in support of the organizations' missions, serving the needs of the Greenville community and beyond. Additionally, staff members also serve on local educational boards and committees. The Executive Director serves on the Community Advisory Group for the Master of Public Health program at ECU's Brody School of Medicine. The Director of Social Work is serving on the Field Education Advisory Committee of ECU's School of Social Work. The Director of Social Work has also been completing course work to earn a master's degree in social work in Spring 2021 and will then pursue clinical licensure.

This year, ten staff members received a total of \$7,500 in scholarships through various Cypress Glen scholarship opportunities.



Executive Director Laurie Stallings with the LCS BEST First Place Award, surrounded by Cypress Glen department directors.

RECOGNITION

Cypress Glen was honored to be one of five LCS communities to receive a first place award in Life Care Services' BEST Competition. Cypress Glen received the BEST (Bringing Excellence Scorecard Total) award for scoring 95% across ten key performance indicators. Indicators include Resident Satisfaction, Employee Safety, Occupancy, Operating Income, Employee Engagement, Five Star Rating, Cash Growth, Employee Turnover, Care Purchasing Services, and Days in Accounts Receivable. Life Care Services initiated the award to recognize communities that are delivering exceptional performance in areas the company considers important in becoming a best-in-class operator.

The virtual presentation of the annual safety awards was hosted by the Pitt County Chamber of Commerce and North Carolina Department of Labor and featured Cherie Berry, North Carolina Commissioner of Labor. Cypress Glen was recognized for receiving the Gold Award in 2019 for experiencing an incident rate less than half the industry average resulting in no lost workdays.

GREENVILLE'S CHOICE FOR SENIOR LIVING

For the third consecutive year, Cypress Glen Marketing and Sales Department led the community to achieve the 100% sold mark. The goal was reached in August 2020 and the expansion project reached 100% sold in July 2020. Despite visitor restrictions, the community maintained high percentages in occupancy and sales the entire calendar year. The community also reached the highest occupancy record in Cypress Glen's history this year with 328 residents.

Article written by Cypress Glen Executive Director Laurie Stallings and Marketing Director Elizabeth Jenkins.



WESLEY PINES

LUMBERTON, NC | WADE ROZIER, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$12,237

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

BENEVOLENCE PROVIDED: \$1,817,268

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

WESLEY PINES National Nursing Home Week looked a lot different this year due to the COVID-19 pandemic with staff bringing the celebration down hallways into resident's rooms. This year's theme was a Super Hero theme which seemed appropriate to honor our amazing, dedicated staff. The highlight of the week included an ice cream "truck" staffed with two clowns delivering treats to residents while playing music. Other events during the year of self-isolation and COVID-19 precautions have included impromptu dance mobs with conga lines dancing throughout the health center, fresh watermelons for residents to enjoy on hot summer days, and pizza parties for each level of care.

COMMUNITY BENEFIT

Wesley Pines continues in the tradition of giving back to the local area and knows the importance of creating goodwill and networking within the community. Participation included the Robeson County Walk to End Alzheimer's, as Ambassadors for the Lumberton Chamber of Commerce and their Image Committee, the Health Robeson Coalition, and the Robeson County History

Museum. Our staff attended various business ribbon cuttings and promoted new business growth. Wesley Pines has been a long-time sponsor for the Lumberton Area Chamber of Commerce Annual Golf Tournament, the Christmas Parade, and the Lumberton Chamber of Commerce Annual Gala. Wesley Pines also supports Southeastern Health Foundation by supporting the Southeastern Health Gala and Festival of Trees.

Wesley Pines has worked with Healthy Robeson for several years, motivated to make Robeson County a healthier county in which to live and work. The group is led by Southeastern Community Health along with several volunteer leaders from across the county. Their mission is to make a community impact to reduce obesity and substance abuse and improve mental health and social determinants of health. During one of the group's Community Cafés in January 2020, Amy Shooter volunteered as a scribe with a group of seniors at Berea Baptist Church.

Other ways Wesley Pines staff has benefited the greater community is through various volunteer efforts. Amy Shooter was asked to join the Robeson County Elder

Pictured above: (left to right): Sidewalk message of appreciation from Wesley Pines family members; Marguerite Branch's humorous message regarding social isolation; Jeff Ashley and Gary Turner setting up outside social distancing for resident family and friend visits; Jeff Ashley and Gary Turner delivering food to residents.

Abuse Multidisciplinary Team (MDT) which tackles issues such as housing, abuse, and financial exploitation. The group meets once every quarter to focus on ways to address elder abuse in Robeson County.

Read Across America Day was established by the National Education Association to help get kids excited about reading. The day is celebrated on the March 2nd birthday of beloved children's book author Dr. Suess. Amy Shooter read to a class of fifth grade students at Southside Ashpole Elementary School for the special day.

Wesley Pines is a sponsor of the Carolina Civic Center Historic Theater and Givens Performing Arts Center. Residents enjoy attending many of the plays and concerts. On March 2, 2020, Wesley Pines was the sponsor for *The Color Purple* at Givens Performing Arts Center.

Wesley Pines offered meeting spaces for the Asbury Homes board meetings, the planning committee for the Robeson County Alzheimer's Walk, two local Girl Scout Troops, Second Time Around band practice, Lumbee Study Club, and Wesleyan Circle group. Several local book clubs, garden clubs, and bridge groups utilize our community as a meeting place. Community Hospice's Annual Memorial Service was held in the Ruby D. McMillan Fellowship Center. An independent living resident hosted the N.C. Lutheran Women's Conference with several women from across the state in attendance. Robeson County Rape Crisis Center and Marketing staff hosted the Navigating the Roadmap of Human Trafficking as an awareness event to the greater community, with approximately seventy attendees. Senator Danny Britt held a town hall meeting with Wesley Pines residents to update them on post-hurricane progress that our legislature is making for our region. Southeastern Community Health's Diane Buri gave a presentation to independent living residents on the importance of keeping their Vial of Life current.

In 2020, Wesley Pines provided benevolent care to 24 residents totaling \$180,518. The health center has 60 Medicaid certified beds and five Medicaid apartments in our assisted living.

WELLNESS & COMMUNITY LIFE

Wesley Pines Community Life Department staff plan engages community residents through various methods to instill a healthy, holistic mindset. Community Life plan activities that promote emotional, environmental, health services, intellectual, physical, social, spiritual, and vocational aspects of resident life. Brain games, community volunteer opportunities, fitness classes, resident-led prayer



Wesley Pines Rehab Department using gardening as part of their treatment plan.

groups, community gardening, art class, creative writing class, lectures, speakers focused on health topics, religious lectures, personal safety awareness tips and encouraging residents to maintain ties to their churches and civic groups are examples of ways that wellness is a way of life within the community.

The Lumberton Junior Women's Service League, the University of North Carolina at Pembroke, Chestnut Street United Methodist Church, First Presbyterian Church, and St. Pauls BETA Club have volunteered to lead activities for Wesley Pines residents. The groups held BINGO, sing-alongs, Bible studies, and other fun events. Lumberton First Baptist Church Youth, Godwin Heights Baptist Church, Littlefield BETA Club, Southeastern Academy, and St. Pauls High School BETA Club also visited with residents. University Baptist Church of Charlotte held a performance for residents.

A group of assisted living residents saw the need to begin a resident-led prayer group several years ago which they have faithfully continued. The group comes together each week to pray for our country, our leaders, and one another.

Carolina Girls Line Dancers performed on multiple occasions for our residents in all levels of care. The popularity of the dancers grew to the point that Community Life Services pursued the group's leader to begin offering line dance lessons for our residents.

Many residents participate in the Creative Writing Class led by Jill McCorkle. McCorkle, a Lumberton native, is a renowned fictional author and has taught at UNC-Chapel Hill, Tufts, and Brandeis. The COVID-19 restrictions did not stop Jill from continuing to champion for our residents to use this time to carry on their writing tasks.

One of our newest partnerships was with the Robeson



Finley and Ruth Read enjoying a rest after a lovely walk at Wesley Pines and keeping their social distance due to the pandemic.

County Public Library. Caroline Lloyd, Resource Specialist, met with the Community Life Services Department members, Marketing Director, and assisted and independent living residents to explain the Dewey Delivery Program. Lloyd shared handwritten notes, prompts, and details to promote and encourage the collaborative program. The Dewey Delivery Program is an inter-generational pen pal activity between Wesley Pines residents and students from Southeastern Academy. The program began in full force in March. For Christmas, Wesley Pines residents sent handwritten notes to their pen pals with a holiday greeting.

Community Life met with independent living residents in January to ask for ideas of what activities and events residents were most interested in. Little did the group know that their best laid plans would soon be thwarted. Instead of planned outings, we would soon be faced with isolation and shutdowns. Events post-lockdown included carts filled with puzzles, treats, music, and devotions being sent to resident apartments to fill their days with activity. With more time on their hands, several independent living residents decided to use their time to organize and complete gardening projects.

Wesley Pines is blessed to have a therapy department that works with residents and other departments to keep residents motivated using creative methods such as patio gardening, Teddy Bear coloring contests, and group puzzles. Wesley Pines Community Life and Therapy Departments partnered with Hickory Grove Baptist Church of Bladenboro to provide a Mother's Day gift bag and floral bouquet to each female resident at Wesley Pines. On Father's Day, each male resident received a gift bag of treats as well.

AWARDS & ACCOLADES

Wesley Pines was again selected as the recipient of the Robesonian Newspaper's Readers Choice Award for Best Retirement Community and the Robeson Living Magazine Best Assisted Living. On January 20, 2020, Wesley Pines was recognized with a Proclamation from the Mayor of Lumberton to congratulate Wesley Pines and LCS for receiving a J.D. Power Award.

EVENTS

Wesley Pines is known for hosting amazing community events and had so many planned for the 2019-2020 year. Marketing outreach events were only beginning when COVID-19 precautions restricted guests from our community. The last event that was held was the Valentine's Day Social with a performance by Kendrix Singletary, which was full of excitement and loads of energetic fun.

In place of our traditional events, we soon turned to connecting with our residents and future residents with planned mail-outs, care packages, home drops, virtual visits, and emails that included links to virtual events at Givens Performing Arts Center and the Carolina Civic Center.

ALZHEIMER'S ASSOCIATION

Wesley Pines continues to lead the county in stepping up to support the Robeson County Walk to End Alzheimer's. Marketing Director Amy Shooter serves as the Robeson County Walk to End Alzheimer's co-chairperson and served on the committee for over 17 years.

Over the past several years, the Robeson County Walk to End Alzheimer's has occurred about every other year. Some years, the walk has been cancelled because of hurricanes, but this past year was impacted because of the COVID-19. Due to COVID-19, the walk was changed. Each participant was able to raise funds virtually and walk on their own the day of the walk. Despite the virus, the mission of the Alzheimer's Association continued with online resources, virtual training events, and other ways to advocate from a distance.

Article written by Wesley Pines Executive Director Wade Rozier.



WESLEY RIDGE

LUMBERTON, NC | JACOB MARING, 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.

(Left Photo) Wesley Ridge Board: Back row left to right: Ms. Emily Dmasters-O'Brien, Director of Property Management, PPM; Mr. Dave Tallent, Associate Property Management, PPM; Mr. Jonathan Erickson, UMRH Corporate Executive Director; Mr. Wade Rozier, Wesley Pines Executive Director; Mrs. Barbara Andrews; Front row left to right: Mrs. Patsy Hayes, Wesley Ridge Property Manager; Mrs. Mary Lamm, Wesley Pines Resident; Mrs. Ruth Read, Wesley Pines Residents' Council President; Ms. Bess Harrington; Mrs. JoAnn Falls; Ms. Elva Finley, Wesley Ridge Resident Representative. Right Photo: 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 \$19,000 for a single person

and \$23,000 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 annually. Mrs. Patsy Hayes is the manager of the community, and Mr. Drew Leonard is the regional 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

Lisa Kistler, Marketing Director

2600 Croasdaile Farm Pkwy. • Durham, NC 27705
(919) 384-2478 • lisak@umrh.org
www.croasdailevillage.org

Cypress Glen

Elizabeth Jenkins, Marketing Director

100 Hickory St. • Greenville, NC 27858
(252) 530-7066 • ejenkins@umrh.org
www.cypressglen.org

Wesley Pines

Amy Shooter, Marketing Director

1000 Wesley Pines Rd. • Lumberton, NC 28358
(910) 738-9691 • ashooter@umrh.org
www.wesleypines.org

Wesley Ridge

Jacob Maring, Manager

990 Wesley Pines Rd. • Lumberton, NC 28358
(910) 618-0361
www.umrh.org/wesley-ridge

THE IMPACT OF GIVING

OCTOBER 1, 2019–SEPTEMBER 30, 2020



Being Gracious

Small and Large Gifts are All So Appreciated

Caleb W. Baker, UMRH Director of Development and Church Relations

I don't know about you, but if you had told me in the fall of 2019 (our fiscal year starts on October 1) what fiscal year 2020 would look like, I would have thought you were crazy. But lo and behold, halfway through the year, everyone's world would be upended by a pandemic. One thing that all of this has taught me is to cherish the time we have with our family and friends. We are certainly not promised tomorrow, and we should value people over things. I guess that is why taking care of our neighbors and loved ones is the second highest commandment after loving God. Your gifts to UMRH and the UMRH Foundation help in tremendous ways, especially in these increasingly uncertain times.

In fiscal year 2020, donors gave the UMRH Foundation and UMRH gift commitments totaling \$1,656,851. The North Carolina Conference of the United Methodist Church contributed \$27,500 to the Foundation along with \$11,014 coming from United Methodist Churches in our conference from their Mother's Day Offerings. The majority of the 2020 funds raised came in before the pandemic hit with roughly \$243,000 in new gifts coming in after March 2020.

The Mother's Day offering was low for fiscal year 2020 for two reasons. First, the development staff decided it best for safety purposes not to offer envelopes to churches in the district this year for their Mother's Day offerings. The health of the people handling these monies was more

**Love the Lord your God with
all your heart and with all your
soul and with all your mind
and with all your strength.
The second is this: 'Love your
neighbor as yourself.'
There is no commandment
greater than these.
*Mark 12:30-31***

important than the dollars coming in. Secondly, for Mother's Day 2020, the vast majority of churches were meeting virtually, and their budgets had been significantly impacted. As a frame of reference: for fiscal year 2019, we received \$33,023, including \$7,700 from Croasdaile Village residents and \$4,068 from Cypress Glen residents.

In 2020, the 22nd annual UMRH Golf Tournament was cancelled. However, many sponsors from previous years still contributed to support benevolent care through a "virtual" golf tournament for a total of \$14,060, which is such an amazing gift.

HIGHLIGHTED GIFTS

Cypress Glen

The estate of Miss Jean Hampson has increased the benevolent care endowment at Cypress Glen tremendously.

With this estate gift, Cypress Glen will now name their Wellness Center the Jean B. Hampson Wellness Center.

In addition, the Estate of Marjorie and Ernest Wright has created a new endowment, with a gift of \$225,000, to support staff education and training at Cypress Glen.

Croasdaile Village

Finishing up the Croasdaile Village “Enhancing the Mind, Body, and Soul” Campaign was a great accomplishment. While we did not reach our four million dollar goal, we did have many people donate. They gave through gifts of cash, stock, real property, and setting up charitable gift annuities to support the campaign in the amount of \$1,798,034.

See Campaign Director George Deaton’s article on page 17 about the “*Enhancing Mind, Body, and Spirit*” Campaign at Croasdaile Village.

Gifts of Property

Margaret White donated a 1998 Cadillac Catera with 40,580 miles to support the Benevolence Fund at Croasdaile Village. This tax-deductible donation was purchased by a staff member and is being driven and put to good use.

**“Do your little bit of good
where you are; it’s those little
bits of good put together that
overwhelm the world.”**

Desmond Tutu

SCHOLARSHIPS

Although our scholarship ceremonies were cancelled due to the pandemic, many of our employees received scholarships to continue their education. The learning continues even if the ceremonies cannot.

Scholarship Recipients at Croasdaile Village

The John D. and Betty Fassett

Dining Services Employee Scholarships (\$1,500 each)

Danielle Winston, Imani Sanford,
Najah Farrington, Sharmar Stanley

The Garland and Kathleen Knott

Scholarships in Healthcare Education (\$600 each)

Dione Thorpe, Juliet Damoah, Margaret Murphy,
Michelle Mourning, Ronald Kurui, Vanessa Brown

The Edward C. and Betty M. Matthews

Employee Scholarships (\$1,000 each)

Dione Thorpe, Margaret Murphy

Scholarship Recipients at Cypress Glen

The Cypress Glen Employee Scholarships (\$750 each)

Megan Zelaski, Justice Crutchfield, Monica Gatlin,
Matthew Stephens, Anastasia Whitehurst,
Morgan Ayscue, Mollie Johnson

The Margaret Mansfield

Memorial Employee Scholarships (\$750 each)

Joshua Hardy, L’Quana Pretty, Tristen Boykin

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. (UMRH), Wesley Pines, Cypress Glen, and Croasdaile Village. Gifts designated for UMRH are for

the benefit of all three communities. Some gifts to a community or to UMRH are unrestricted, which means the donor wants the gift to be used where needed most, as approved by the UMRH Board of Trustees. Other gifts are designated for a particular purpose, such as a capital project or a benevolence fund or endowment. The UMRH

Foundation and UMRH are grateful to all donors who have elevated our organizations to the level of family as they define their legacy of helping others.

Donors who ultimately want to make a gift to charity after life, while receiving income and tax benefits during life, can do so through a charitable gift annuity (CGA). Please contact The UMRH Foundation if this is something that may be of interest to you.

The UMRH Foundation is grateful to our many friends, residents, business partners, team and board members, who regularly and generously contribute to furthering our work. It is with deep gratitude that we thank our donors for their continued generosity and belief in our work. Many thanks for your support. Your charitable gifts allow us to accomplish more. Your gifts plant the seeds to help older adults live better.

As is the case every year, we would like to say thank you to so many people, companies, estates, and foundations for making our work possible and continuing to support the efforts of The UMRH Foundation.

Enhancing Mind, Body, and Spirit Campaign at Croasdaile Village Wraps Up with Recognition of Campaign Leaders

George Deaton, Croasdaile Village Campaign Director

On January 29, 2020, campaign committee members and guests were recognized at an appreciation luncheon for their leadership of the “*Enhancing Mind, Body, and Spirit*” Campaign at Croasdaile Village. This was the culmination of the campaign, which raised over \$1,798,034.

Plans for a capital campaign at Croasdaile Village were initiated in fiscal year 2016 to help fund several components of the second phase of the expansion project: a new wellness center with state-of-the-art aquatic center; aerobics and exercise rooms and hot tub; a spa and hair salon; a new, larger auditorium; new casual and formal dining spaces; new physical therapy wing; and additional assisted living facilities, among others.

Resident and non-resident donors rallied to the cause, many of them making naming gifts such as that for the **Jack and Betty Fassett Auditorium**.

Croasdaile Village management wishes to express appreciation to the campaign committee and to donors listed below for their leadership and support.



Jack and the late Betty Fassett

Campaign Committee Leaders & Members Recognized at the Luncheon

Dr. Brian Gentle, Co-Chair; Past UMRH Board Chair

Gary Whaley, Esq., Co-Chair; UMRH Board Chair

Mr. George Deaton, Campaign Director

Mrs. Cheryl Miller, Campaign Administrator

Mr. Caleb Baker, Director of Development

Dr. Jack Carroll, Past Croasdaile Village Residents Association President

Mr. Howard DeWitt, Croasdaile Village Executive Director

Douglas Koenig, Esq., Elder Law Attorney

Dr. Woody Mason, Croasdaile Village Resident

Mrs. Betsey Miller, Past Croasdaile Village Residents Association President

Ms. Sharron Nance, Croasdaile Village Resident

Anthony Nicholson, Esq., Estate and Trust Planning and Administration

Mr. Earl Powell, Croasdaile Village Residents Association President

Ms. Barbara Pray, Croasdaile Village Residents Association Immediate Past President

Mr. Steed Rollins, Real Estate Sales and Marketing

Mr. Bucky Waters, Croasdaile Village Resident

Mr. Jonathan Erickson, UMRH Executive Director

Anonymous Donor
Barnes Family Foundation

Mr. Franklin L. Bird
Ms. Kathryn W. Bradley

Dr. and Mrs. Jack Carroll
Croasdaile Village
Residents Association

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Mr. Charles R. Eilber

Dr. John D. Fassett

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David and Betsey Miller

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Ms. Sharron Nance

Mrs. Barbara W. Pray

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Dr. Stephen R. Smith

and Beth Armbruster

Susan M. Sparks, Ph.D.

The GG Zastrow Family

Mr. and Mrs. Bucky Waters

Mr. and Mrs. Gary Whaley

Mr. Francis M. Whang

Ms. Sara Lou White

DONOR THANKS

October 1, 2019 thru September 30, 2020

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One of the last of Croasdaile Village's "pioneer" residents, who with her then husband Ralph, occupied one of the first cottages built on the new UMRH campus in Durham on January 15, 1999. With a sad heart, we must say that Ruth Ambrosius passed away in 2020. Ruth was adored by many of her fellow residents and friends. She was also a favorite of another long-time, 21-year veteran Fred Royster, Croasdaile Village Maintenance.

*Written by Jim Haskins,
Croasdaile Village Resident*

Thank You to All of Our Donors
Your generous donations have been a great support to
The UMRH, Inc., communities for 2019-2020.



Golf Tournament Supporters Rally During the Pandemic

In 2020, The United Methodist Retirement Homes, Inc., was supposed to sponsor its twenty-second annual golf tournament for the benefit of the Benevolence Fund for residents in need. Regretfully, because of the COVID-19 pandemic, the tournament had to be cancelled. Even though we missed out on the collegiality and friendly competition of an in-person tournament, our many friends, supporters, residents, staff, and sponsors responded to our call for a “virtual appeal” tournament by donating **\$14,060**.

We thank our past golfers, golf team organizers, and sponsors without whom we could not have had twenty-one years of successful tournaments and a successful 2020 “virtual appeal” tournament. As in the past, friends, residents, board members, staff, and sponsors related to all three of our communities contributed to the 2020 success.

Many of our 2020 sponsors contributed, including our tournament co-sponsors, Ziegler Investment Banking and BB&T, now Truist Bank.

The spirit of the tournament was maintained with the help of prize sponsors. There were several prize donors and winners. Duke University Store sponsored two \$50 gift cards, won by Warren-Hay Mechanical Contractors and Tanner Robinson, Oppenheimer & Co. Inc. Marina Barnes, A Clean Look, won one dozen Callaway golf balls. Dave Pendleton’s prize was a Durham Bulls t-shirt and Linda Pendleton was the winner of a golf ball marker set.

The pandemic has impacted all of us — individuals and business owners. Your 2020 commitment to helping residents in need through your gifts to the UMRH Foundation Benevolence Fund is particularly gratifying. Thank you, and stay safe.



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Foundation Ethics and Donor Protection

The Foundation and its volunteer 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.

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- 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.
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- 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.

WAYS TO GIVE



* CGA: Charitable Gift Annuity

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***“Have you included
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