



20

22



UMRH ANNUAL REPORT

THE UNITED METHODIST
RETIREMENT HOMES, INC.
UMRH.ORG

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; Howard DeWitt, Interim - Wesley Pines; Amy Shooter, 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 • umrh.org • umrhgift.org

©2022 UMRH, Inc. All rights reserved.

EDITORS and CONTRIBUTORS

Jonathan Erickson, Caleb Baker, Stacy Dobson, Angie Pegram, Heather March, Rebecca Marion-Grady, Laurie Stallings, Anna Holloman, Elizabeth Jenkins, Amy Shooter, Kimberly Walters

TABLE OF CONTENTS

UMRH Chairman and Corporate Executive Director's Welcome - Page 1

UMRH Leadership - Page 1

Year-End Financials - Page 2

Communities - Page 4

Donor Spotlight - Page 15

Donor Thanks - Page 19

It is our pleasure to introduce to you the 2022 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 well-being of our residents and staff. Who would have guessed that declining Covid issues would give way to supply chain, inflation, and employment hiring challenges? 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 fourth 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 to thrive, grow, and serve our residents and employees.

We are truly appreciative of all the thank you notes, 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 overall resident experience and satisfaction. Many of our residents that serve on committees such as Spiritual Life, Building and Grounds, Life Enrichment and Wellness, to name a few, began meeting face-to-face for the first time in a couple of years.

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. Although somewhat scaled back during the pandemic, our communities continued to be involved and supported local 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 and Cypress Glen expansions, master planning, continued high standards for resident care and maintaining our Fitch BBB status, which demonstrates continued financial stability for our terrific resident-centered enrichment programs.

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



UMRH AND FOUNDATION BOARD OF TRUSTEES AND DIRECTORS



Top Row – Left to Right: Deborah Montague, UMRH Board Chairman; Rev. Paul Lee, UMRH Board Vice Chairman; Nancy Van Antwerp, Secretary; Lee Harriss, Treasurer; Carl Hardy; Kathryn Bradley; Rev. Gray Southern; Barbara Hastings, Croasdaile Village Residents' Association President. **Bottom Row – Left to Right:** Rev. Robert Mangum, Wesley Pines Residents' Association President; Fred Mattox, Cypress Glen Residents' Association President; Dr. Richard Evans; Mack Parker; Susan Ezekiel; Charles Mercer; Dr. Kenneth Steinweg. **Not Pictured:** John Link.

UMRH AND COMMUNITY LEADERSHIP



Above – 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; 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

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



Stacy Dobson
UMRH Chief Financial
Officer

Mr. Don McNeil, of FORVIS, presented the audit report for UMRH for the fiscal year, ending September 30, 2022, 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.

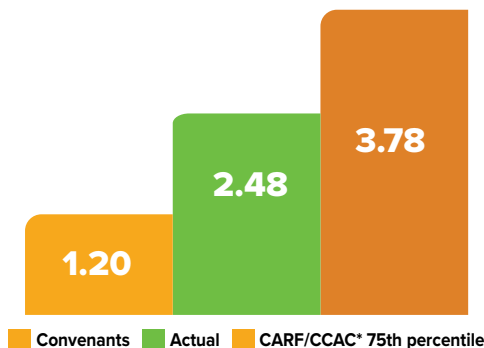
COVENANTS: "Covenants" are agreements UMRH has with its lenders. The covenants require UMRH to have a minimum of 250 days cash on hand, a 1.2 times debt service ratio coverage, and a 35% cash to debt ratio. The chart below shows that all of these requirements are met.



Cypress Glen resident Patricia Rawls welcomes friends and neighbors to gather on her screened porch. Left to right: Ann Whitehurst, Bill and Mary-Hannah Taft, Earl Trevathan, and Patricia Rawls.

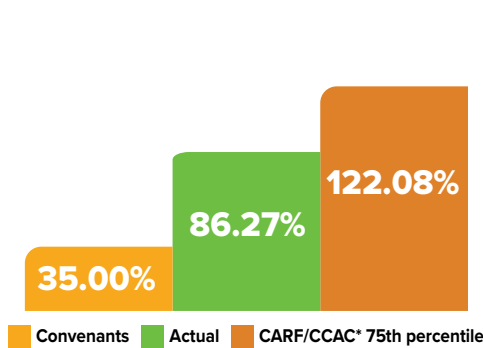
2022 FINANCIAL ACHIEVEMENTS

UMRH, Inc. Debt Service Coverage Ratio



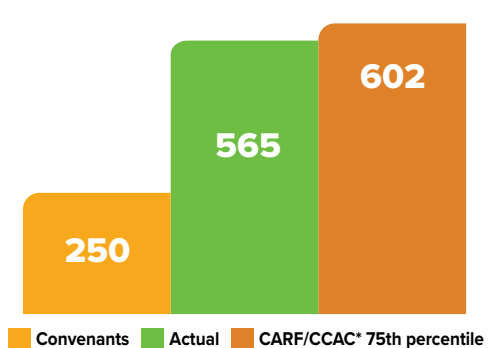
This is a "Capital Structure" ratio focusing on the balance sheet and providing insight into long-term solvency. This ratio reflects the organization's ability to fund annual debt service with cash reserves and net entrance fees.

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

YEAR-END FINANCIALS

The United Methodist Retirement Homes, Inc., Its Affiliate and Subsidiary Consolidated Balance Sheet As of September 30, 2022

ASSETS	
Current Assets	
Cash	\$5,954,084
Contributions receivable, current portion	2,412
Investments	81,293,248
Assets limited as to use, current portion	17,271,385
Accounts receivable, net of allowance for uncollectible accounts (\$265,000)	3,127,429
Other receivables	1,291,459
Inventories	177,215
Prepaid expenses and other current assets	1,212,086
Total current assets	<u>110,329,318</u>
Non-Current Assets	
Assets limited as to use, net of current portion	24,307,039
Investments - restricted	7,793,000
Assets held for resale	197,103
Property and equipment, net	214,309,967
Investment in Wesley Ridge	75,494
Trusts receivable	119,600
Deferred marketing costs, net	101,570
Interest rate swap agreements	10,442,208
Total non-current assets	<u>257,345,981</u>
Total assets	<u>\$367,675,299</u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Annuity payable, current portion	\$81,502
Bonds payable, current portion	5,785,000
Accounts payable	4,120,054
Accrued salaries and related expenses	2,152,753
Accrued interest payable	1,719,639
Provider relief advanced funding	120,181
Total current liabilities	<u>13,979,129</u>
Long-Term Liabilities	
Annuity payable, less current portion	439,945
Bonds payable, less current portion	160,327,909
Liability for refundable advance fees	14,737,849
Deferred revenue from non-refundable advance fees	76,325,122
Due to related parties	71,377
Funds held for others	147,814
Total long-term liabilities	<u>252,050,016</u>
Total liabilities	<u>266,029,145</u>
Net Assets	
Without donor restrictions	89,297,478
With donor restrictions	12,348,676
Total net assets	<u>101,646,154</u>
Total liabilities and net assets	<u>\$367,675,299</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, 2022

REVENUES, GAINS, & OTHER SUPPORT WITHOUT DONOR RESTRICTIONS	
Net resident and patient service revenue	\$70,475,317
Amortization of advance fees	9,599,475
Net assets released from restrictions	703,837
Other	92,726
Interest and dividend income	3,679,989
Total revenues, gains and other support	<u>84,551,344</u>
EXPENSES	
Nursing services	20,461,059
Dietary and food services	12,184,286
Administration	12,973,682
Plant operations, maintenance and security	7,582,907
Laundry and housekeeping	4,228,726
Resident services - activities	2,620,070
Home care	3,054,319
Interest	4,134,114
Depreciation and amortization	14,284,564
Bad debt expense	374,718
Total expenses	<u>81,898,445</u>
Operating income	<u>2,652,899</u>
NON-OPERATING GAINS (LOSSES)	
Net investment gains, realized	933,264
Net investment losses, unrealized	(21,617,264)
Provider relief funding	484,919
Loss on disposal of property and equipment	(115,890)
Contributions	71,614
Construction related marketing costs	(8,971)
Loss on early extinguishment of debt	(2,076,605)
Change in fair value of interest rate swap agreement	10,632,953
Other	7,999
Net non-operating gains (losses)	<u>(11,687,981)</u>
Excess of expenses over revenues, gains and other support	(9,035,082)
Net assets released from restrictions for purchase of property and equipment	265,224
Change in net assets without donor restrictions	<u>(8,769,858)</u>
CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS	
Contributions	2,914,469
Interest and dividend income	484,549
Net investment gains, realized	134,008
Net investment losses, unrealized	(2,521,556)
Change in split interest agreements	(487,187)
Maturity of split interest agreement	247,684
Change in value of pledges	(24,898)
Bad debt expense	2,589
Net assets released from restrictions	(969,061)
Change in net assets with donor restrictions	<u>(219,403)</u>
Change in net assets	(8,989,261)
Net assets, beginning of year	110,635,415
Net assets, end of year	<u>\$101,646,154</u>



CROASDAILE VILLAGE

DURHAM, NC

HEATHER MARCH, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$22,450

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

BENEVOLENCE PROVIDED: \$3,324,783

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

HEALTH CENTER RENOVATION

In 2013, the 114-bed Health Center at Croasdaile Village started out on a renovation journey to enhance the environment by making it a more home-like, resident-centered environment. The renovation was split into three phases.

Phase I included renovation of the north side neighborhoods by removing four resident bedrooms and opening the space for a living room area for our residents. This changed our bed capacity from 114 beds to 110 beds. Phase I was completed in 2013.

Phase II started in 2014 and encompassed expanding and updating the resident dining and activity spaces. This phase took two years to complete due to county and state inspection requirements. In 2017, Croasdaile Village had other expansion projects that were needed; therefore, the Health Center renovation was placed on hold. In 2022, we were able to start and complete Phase III of the renovation project which included the renovation of the south side neighborhood area. This phase was special to our team and our families. We were

able to create life stations for our residents living with cognitive decline. We created a nursery, movie theater, beauty vanity, and office space. This renovation removed six closed beds resulting in a resident capacity of 104 beds.

WELLNESS ASSESSMENTS COLLABORATION

First year physical therapy students from both Duke University and UNC-Chapel Hill visited our community in February and April of 2022. Students were treated to a tour of the campus led by the Resident Wellness Committee, and learned of life, layout, and levels of support available to residents at a CCRC. When not touring the campus, the students worked with residents and administered standardized tests for fitness as well as balance. Nearly 200 residents participated over three sessions with nearly 150 students from both universities. Residents not only received valuable information on their personal fitness and fall risk, but also helped these young students practice their clinical skills and interpersonal communication with older adults. The partnership with both universities is scheduled to continue in 2023.

Pictured above: (Left Photo) Dottie Waters and Carol Holbert enjoy a game of Ladder ball during the Wellness Festival in Sparks Park. (Middle Photo) Residents enjoy staying active with a game of chair volleyball in Fassett Auditorium. (Right Photo) Croasdaile Village's Community Band, The Rusty Pipes, practices diligently for their upcoming performance in Fassett Auditorium.



Labor Commissioner Josh Dobson presented the SHARP award to Croasdaile Village Executive Director Heather March.

NC DEPARTMENT OF LABOR SHARP AWARD

Croasdaile Village was awarded for its participation in the N.C. Department of Labor's (NCDOL) Safety and Health Achievement and Recognition Program (SHARP) for continuing to develop and uphold extraordinary health and safety standards. The award was presented during a ceremony held on November 29, 2022.

Labor Commissioner Josh Dobson provided keynote remarks as well as presented the SHARP flag and award to Croasdaile Village leadership and residents. Commissioner Dobson applauded Croasdaile Village's ability to maintain a safe and healthy workplace, despite the Covid pandemic.

Throughout the journey to reach SHARP status, Croasdaile Village worked with Blair Byrd and Bruce Pearson, safety consultants with the NCDOL's Consultative Services Bureau. During the award ceremony, Byrd emphasized the exclusivity of becoming a SHARP-certified workplace. There are roughly 175 SHARP sites out of a total of around 260,000 businesses and workplaces across North Carolina. That places Croasdaile in unique company and continues a vision that started a few years ago with management's commitment to obtaining SHARP recognition. The Croasdaile leadership team learned of the SHARP award due to their sister community Cypress Glen earning the SHARP award several years ago.

Employees and residents are both crucial to the development and execution of workplace safety operations within the community. Employees and residents in our community work together to identify workplace hazards and how to fix them, maintain compliance with OSHA standards, and to offer an environment where safety and healthcare are a top



Duke University and UNC-Chapel Hill students conduct a wellness assessment with Susan Bradford.

priority. Croasdaile Village has both an Employee Safety and Resident Safety Committee and both are active. It is a significant achievement for our community to be a part of such an elite group of businesses.

HEARTFELT CONNECTIONS: A MOVE TOWARDS DEMENTIA EDUCATION AND INCLUSIVITY

Heartfelt Connections is the Life Care Services signature dementia education program. This program provides a systemic approach to the fundamentals of understanding, caring, and supporting those living with dementia and other cognitive impairments. We began our efforts in our Memory Care neighborhood in 2021. In 2022, we expanded our education to Assisted Living and the Health Center. It has been a joy to see team members and families embrace the program and see the fruits of the education. We hope to continue this program in 2023 where we will be expanding our efforts towards the Independent Living side of campus. In part, our goal with the independent living setting is to enhance dementia education, awareness, and sensitivity.

In March of 2022, the community was recognized by Life Care Services for their efforts to begin a shift towards dementia education by receiving the Silver Level Award for Heartfelt Connections.

CHEERS TO 45 YEARS OF EXEMPLARY SERVICE: LYNDA BASS

Lynda Bass joined our team in December 1976. She began her service at the old Methodist Retirement Community campus on Erwin Road. She has been a faithful servant to our residents and community for 45 years. Lynda has primarily served in our healthcare areas



Left to right: Dr. Tyronne Baines and John and Priscilla Morgan enjoy Game Night in The Cynthia & Marvin Barnes Pub & Café.



Left to right: Scott Hill, Jane Green, and Emilie Beglane raise a glass at the Wine & Cheese event held at the Pub.



Lynda Bass
45-Year Employee

of the community. It is rare to find her level of loyalty in the workforce today. Lynda brings life to the Dining Department and peace of mind to those in her lead. Lynda enjoys country music, the Western *Guns* smoke which she never misses, traveling to the mountains, and most of all, her Croasdaile Village/Morrison's family. We are blessed to have her as a part of our community.

EXTRAORDINARY PEOPLE: EMPLOYEE OF THE YEAR

Croasdaile Village launched the Life Care Services Extraordinary Impressions Employee of the Month Program in January 2022. The purpose of the program is to recognize employees who have demonstrated exemplary hospitality, carry out the Mission and Vision of Croasdaile Village, and exhibit the qualities of above and beyond service. Nominations are made by Croasdaile Village residents, family members, visitors, and/or other employees.

The Team Appreciation Committee (TAC) reviews the nominations and selects the Employee of the Month and Employee of the Year. The TAC Committee, which consists of line team members from various departments, is also responsible for planning several community employee appreciation events. Below are the employees who were recognized for their extraordinary service to our residents and our Croasdaile Community:

JANUARY: Frankie Blackwell, Health Center Executive Assistant

FEBRUARY: Dianna Revas, Environmental Services Housekeeping Associate

MARCH: Quinton Fields, Dining Associate

APRIL: Robert Monger, Transportation Associate

MAY: James Leak, Health Center Certified Nursing Assistant

JUNE: Kristie Charles, Plant Operations Administrative Assistant

AUGUST: Beverly Wolfgang, Health Center Registered Nurse

SEPTEMBER: Maria Prudencio, Environmental Services Housekeeping Associate

OCTOBER: Jonathan Perkins, Administration IT Support

NOVEMBER: Tatum Nuchurch, Home Care Certified Nursing Assistant

DECEMBER: Kelvin Cuevas, Environmental Services Custodian
EMPLOYEE OF THE YEAR 2022



Kelvin Cuevas
2022 Employee of the Year

Article written by Heather March, Croasdaile Village Executive Director and Rebecca Marion-Grady, Associate Executive Director.



CYPRESS GLEN | GREENVILLE, NC LAURIE STALLINGS, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$346,046

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

BENEVOLENCE PROVIDED: \$605,738

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

Cypress Glen's spiritual life community continued to experience change during 2022. We gathered for worship each Sunday and consistently often averaged between 55-60 in attendance and exceeded 70 people. We leveraged and upgraded the gift of technology to broadcast our weekly worship services for those who are unable to attend in person. For those who join us through CGTV, we made the Holy Communion elements available so they could participate and partake along with those attending the service in person. In addition, weekly full worship services were offered in assisted living, long-term care/skilled nursing, and memory care, adapted to meet the specific needs of each level of care, with total attendance averaging between 15-20. Local pastors and priests from churches in the community also returned to providing worship services monthly to include Catholic, Episcopal, and Disciples of Christ churches. Several pastors from the local area came routinely to visit with their parishioners who lived at Cypress Glen, enabling our residents to stay connected with their home church. Prayer remained a central part of spiritual life through a prayer basket placed outside Brown Chapel to share praises and concerns, as well as

through a Saturday morning group which met to pray together for the community, their families, and friends. These prayers are also lifted up in our worship service, if requested. In 2022, we were able to distribute \$30,700 to 18 community organizations in Pitt County and another \$2,700 to Cypress Glen's Benevolent Care Fund. Several residents continued to serve by volunteering at the Joy Soup Kitchen each month. In addition to these opportunities to worship, give, and serve, we expanded to a total of five spiritual, small group opportunities for our residents to engage weekly or monthly during, which they prayed, studied, and enjoyed fellowship, continuing to grow in their faith. We now look forward to the new ways God's Spirit will stir among us in 2023!

SAFETY FIRST

On February 9, 2022, a life safety inspection was performed by the construction division of the North Carolina Department of Health and Human Services. This yearly inspection ensures the design and operating features of a facility provide a reasonable level of safety for the building's occupants. The inspector looks at a building's construction, its fire protection systems,

Pictured Above: (Left Photo) Resident Marvin Pridgen hones his skills in the Cypress Glen resident woodshop. (Middle Photo) Fred's Oasis at Cypress Glen is a hot spot for cold drinks, watching sports, and competitive shuffleboard matches. Resident Frank Sabiston and Joan Taylor are hard to beat! (Right Photo) All that jazz! Talented musician and Cypress Glen resident Steve Creech croons to the crowd.

and operational features which provide safety from fire, smoke, and general panic during emergencies. Cypress Glen met or exceeded all the state and federal regulations during this survey.

An unannounced Medicare recertification survey was conducted May 31 through June 1, 2022, also by the North Carolina Department of Health and Human Services. This survey is performed annually to ensure Cypress Glen's long-term care/skilled nursing unit is in full compliance with the rules and regulations required to participate in the Medicare program. Cypress Glen was deemed in full compliance with all the requirements and no recommendations were made. The surveyors were very complimentary of the care and services provided. Additionally, the Cypress Glen Memory Cottage received a deficiency-free regulatory recertification survey in May of this year.

Cypress Glen Retirement Community participates in yearly fundraising efforts for the Walk to End Alzheimer's in 2022, submitted a team contribution of \$1,600. The community hosted BINGO for Bucks, sold guest tickets for the community's 35th Anniversary event, and collected individual monetary contributions.

Cypress Glen Memory Care was chosen to participate in an accreditation pilot program through the University of North Carolina. This program requires quarterly submissions of resident data related to regulatory requirements and uses the information collected to perform compliance and quality assessments of care. Cypress Glen receives a quarterly payment of \$500 for participating in this program. The goal at the end of the program is to introduce this accreditation organization as a new option for annual recertification surveys for participating adult care home facilities.

In December, Life Care Services design team, along with a local contractor, completed a complete cosmetic renovation of the Memory Cottage. This project included fresh paint, updated flooring, new cabinetry and countertops, new appliances, ceramic tile work, furniture replacement, windows treatments, and an innovative therapeutic-controlled lighting system that will be completed in Spring of 2023.

Local artist Jacob Baysden painted a colorful and unique focal point on the screened porch of the Memory Cottage. This garden mural was inspired by the beautiful plants and flowers found in the cottage garden and is a beautiful addition to this popular gathering space.

Cypress Glen achieved a Silver rating for Life Care



Mural painted by local artist Jacob Baysden on the screened porch of the Cypress Glen Memory Cottage.

Services Heartfelt Connections Memory Care Program. This program involves dementia education for staff, as well as physical environmental changes to promote independent interaction and stimulation for the residents living with dementia. Communication techniques, behavior management, personal care techniques, activities and life enrichment programming, caregiver support, and culture change are other components of this program to care for residents living with dementia.

NOW SERVING...

The past year has brought exponential change to Cypress Glen's Dining Department. We began a partnership with Bear Robotics, using a Servi robot to assist in delivering meals to our residents. This resource proved to be helpful during staffing challenges. It also serves as entertainment for the residents, playing classic jazz music as it moves throughout the dining room.

Dining Services continued the tradition of special event menus throughout the year, drawing big crowds to the dining room for fine dining experiences. The community's 35th anniversary was celebrated by inviting all staff, residents, and resident families to an outdoor cookout. Attendees enjoyed their delicious meal under a large tent followed by dancing to live music with The Band of Oz and an ice cream truck from the local creamery. We continued to open our community to resident families with our annual "Cookies with Santa" social and family gatherings throughout the community during the holiday season.

A big focus for the dining team this year has been utilizing our magnificent pub space, Fred's Oasis. The team hosted themed wine tastings throughout the year,

taking residents through the geography and viticulture of several different countries and regions. Brent Riggs, Dining Director, and Mark Davies, Executive Chef, created two “pop-up” restaurant concepts that turned the space into a full service, reservation-only, experience for the residents. “Out for a Wok,” an Asian-inspired stir fry restaurant and “Let’s Taco Bout It,” an authentic Mexican taqueria, were very well received with over 120 residents attending both events. The holiday season saw more resident events hosted in Fred’s Oasis, punctuated by a very successful social for Future Residents. Over 100 guests from the waitlist gathered for the festive Mingle & Jingle marketing event. With the success of these events and the community opening up to guests, Fred’s Oasis has become the go-to spot for residents to host parties and utilize Cypress Glen’s creative catering services.

FOR YOUR ENTERTAINMENT

Cypress Glen is extremely fortunate to have many talented residents who enjoy sharing their gifts. Steve Creech and his quintet performed on several occasions, from ringing in the New Year to a Mardi Gras Dixieland Jazz celebration, and a rousing Fourth of July music concert. Creech also joined The Emerald City Big Band for two concerts on campus this past year. Rudy Alexander presented incredible monthly travelogues, taking us around the world with a slideshow of his personal photographs and educating us with fascinating facts of each location. Howard Shokler and the Carolina Chord Connection chorus sang on three different occasions this year, serenading our residents in perfect harmony. Bob Hursey also draws a large audience as he shares his collection of “Walk Down Music’s Memory Lane,” a program sharing recorded music along with the history of entertainers of the past. Another notable musical concert featured guest musical duo “Lewis ‘n Clark” who performed a wonderful tribute to Frank Sinatra and Patsy Cline.

Cypress Glen residents stayed on the road with trips to the NC Museum of History, NC Museum of Art, coastal trips to Harker’s Island and Fort Macon, Down East Wood Ducks minor league baseball games, a trolley tour of historic New Bern, guided tour of historic Halifax, and the CSS Neuse Interpretive Center in Kinston. As always, residents also enjoyed attending numerous performances at the DPAC in Durham and North Carolina Theater in Raleigh.

The Life Enrichment team partnered with Dining Services for special theme dining experiences throughout 2022.

Residents love these events and look forward to the unique menu offerings and special entertainment. Fred’s Oasis has provided a perfect venue for regular gatherings of Karaoke Fun, trivia challenges, and Saturday shuffleboard games. The pub is also ideal for Super Bowl parties and intimate holiday socials. It has been wonderful to, once again, welcome resident families to also enjoy these gatherings.

Our music therapy program continued to thrive in 2022 with the expansion of the Silver Rhythm’s Drum Circle program. This group meets weekly, using drumming to increase energy levels, boost the immune system, and increase social interaction. The monthly Keys Club is an opportunity for those with an interest in the keyboard or piano to gather monthly to interact and share common experiences.

December brought families and friends to campus for events, activities, and dining. We welcomed several church cantatas and local singing groups for holiday concerts in our auditorium. We traveled to New Bern’s Centenary UMC for Handel’s Messiah and to Raleigh’s Meymandi Hall for the North Carolina Symphony Holiday Pops concert.

The Wellness Center added two new classes this year. Chair Volleyball has become a popular way to get some exercise while enjoying a good time with fellow residents. The new Aerobic Beats class incorporates the use of large exercise balls and drumsticks to keep our residents fit while keeping the beat!

SALES, MARKETING, & FUTURE GROWTH

Cypress Glen reached 100% sold status five times during 2022 and maintained high sales and occupancy throughout the year. Additionally, the Future Resident Program grew to nearly 190, the most ever on the waitlist.

Planned growth of the community is vital to meet the needs of current and future residents. For several years, Cypress Glen and LCS Development have been working on a master plan to renovate the current campus and add 57 Independent Living apartments. Construction and refurbishments are estimated to begin in late 2023.

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



WESLEY PINES | LUMBERTON, NC

AMY SHOOTER, EXECUTIVE DIRECTOR

COMMUNITY BENEFIT: \$19,640

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

BENEVOLENCE PROVIDED: \$894,452

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

COMMUNITY BENEFIT

Wesley Pines understands the value in giving back to the local area and knows the importance of creating goodwill and networking within the community. Wesley Pines serves as an Ambassador for the Lumberton Chamber of Commerce, is a longtime sponsor for its Annual Golf Tournament and the Christmas Parade. Residents and employees volunteer at both events. Wesley Pines offers meeting spaces for two local Girl Scout Troops, Second Time Around band practice, and The Oaks Homeowners' Association meetings.

Over the past year, Wesley Pines has offered clinical teaching space for future healthcare workers from the University of North Carolina at Pembroke, Robeson Community College, and local high schools. The institutions have used the community as hands-on learning sites to educate nursing and certified nursing assistant students.

In the Spring 2022, Wesley Pines participated in a job fair hosted by Robeson Community College. Through the job fair, both students and alumni were reached to share part-time and full-time job opportunities.

In 2022, Wesley Pines provided benevolent care to eight residents that totaled \$137,932.88. The health center provided 12,020 days of nursing care to Medicaid recipients and 658 days of care to assisted living residents. Altogether, the Medicaid discounts totaled \$346,673.42.

HEALTHCARE

Wesley Pines began a partnership with Eventus Whole Health in April 2022. Eventus is the country's leading provider of primary care and mental health services for medically vulnerable adults. The group provides both customized primary care and mental health services to residents. Drs. Sandeep Patel and Rhonda Lowry are co-Medical Directors and Brandie Jacobs, FNP, is on site four days a week. This collaboration has improved the lives of our residents by giving them greater access to medical care.

During the pandemic, health surveys and inspections did not take place as a precaution to prevent the spread of Covid and due to this, there was a backlog of inspections delaying full surveys. After a two-and-a-half-year period

Pictured Above: (Left Photo) Dorothy Powers blows bubbles during a National Nursing Home week activity. (Middle Photo) Frederick and Doris Vines show off their "ugly" Christmas sweaters. (Right Photo) Ruth Dion looks on as paratroopers perform a jump in for the Veterans Day Celebration.

of no full surveys, Wesley Pines had their Annual State Survey by the Department of Health and Human Services Division of Health Regulation in April 2022. The thorough inspection revealed two minor deficiencies which were corrected with a plan of action. In the following month, the Life Safety inspection was done showing the community to be in compliance with no deficient practices. This was the second year in a row that the Wesley Pines team celebrated no Life Safety deficiencies. The local fire marshal inspection also revealed no deficiencies during an annual assessment.

ADMINISTRATION

In November 2021, Mr. Howard Dewitt was appointed as Interim Executive Director of Wesley Pines. Howard utilized his many years of experience as Croasdaile Village's Executive Director to complete a wage analysis and wage increase to ensure that the community was offering a competitive wage to retain and attract the best workers and mitigate the impact of increasing inflation affecting workforce.

Beginning August 2021 to August 2022, Amy Shooter completed her Administrator-in-Training at Croasdaile Village serving under the direction of Croasdaile Village Associate Executive Director Rebecca Marion-Grady who was her preceptor. Amy completed her training and successfully passed her state and national exams in late July. She was appointed as Executive Director effective August 30, 2022.

As Amy's training took on a full-time roll in March 2022, the community began searching for her replacement. In May 2021, Mrs. Kimberly Walters began as the new Marketing Director. Kimberly was a clear choice for the role with her experience in social work, admissions, and discharge planning having worked for the former Southeastern Regional Medical Center and a neighboring skilled nursing facility. She has already proven to be a strong salesperson. She received a 100% Occupancy Award during the 2022 Life Care Services (LCS) Marketing Fiesta held in San Antonio, Tx. and created and emailed the most OneDay videos in our LCS region.

Karen Cribb, RN, who serves as the Director of Nursing, was chosen to serve on the Career Employment Council in September 2022. The Council consists of the Public Schools of Robeson County, Robeson Community College, the University of North Carolina at Pembroke, and area businesses. The collaborative group was formed as a way for each educational establishment



Wesley Pines resident and Veteran Rudolph Floyd performing his daily salute to the American flag.

could learn what the workforce is seeking. Wesley Pines in turn serves as clinical sites for these educational establishments.

Ashland Moore, RN, joined the Wesley Pines team as the new Assistant Director of Nursing in September 2022. Moore is a graduate of Robeson Community College and has worked in both hospital and hospice care settings. She became the community's Infection Preventionist after receiving her N.C. Statewide Program for Infection Control and Epidemiology certification in November 2022. She quickly acclimated to her role in long-term care and has implemented many interventions to help the nursing team operate more productively.

In October 2022, Jessica Stanley was hired as the community's Healthcare Admissions Director. Stanley is no stranger to Wesley Pines having served as the Therapy Director for six years. With her background as a Certified Occupational Therapy Assistant and her understanding the needs of the community, she was a natural for her new role. The community completed last quarter with 95% occupancy and will no doubt reach the 100% occupied milestone with Jessica's focus, motivation, and positive attitude.

During the year, Amy Shooter and Plant Operations Director Charles Davis participated in three Emergency Preparedness Trainings provided by LTC2Prepare. The training focused on how to respond in the event of any natural or man-made disaster and show to successfully shelter in place or evacuate residents and staff.

Wesley Pines' hired Merissa Everette as the community's new Social Worker in November 2022. Merissa is a Lumberton native who graduated from the University of North Carolina at Pembroke with a Bachelor's Degree in Social Work. Having recently graduated, she is receiving



For Halloween, the Wesley Pines rehab team dressed as characters from the Wizard of Oz. Shown are PTA Sandra Daniels, COTA Jessica Stanley, OT Emily Evans, and OT Sonia Lawson.

guidance and mentorship in her new role from the team to ensure her success.

WELLNESS & COMMUNITY LIFE

With thirty years of dedication to Wesley Pines and a wealth of experience planning and organizing resident activities, it was apparent that Stephanie Ward would be the best candidate to take the reigns as Community Life Services Director. Ward began her career at Wesley Pines as a Certified Nursing Assistant later transferring to become the Assistant Activity Director which suited her creative side and passion to engage our residents in meaningful ways. Throughout her years, she gained knowledge of assessing, care planning, organizing, leading events, and managing volunteers.

Once Ward transitioned to her role, Jennifer Williams was announced as the Assistant Community Life Services Director. Williams served as the Administrative Assistant for nearly five years prior to her transfer. She became well acquainted with residents in her previous position and seemed to be a natural for her new role.

Wesley Pines Community Life Department engages community residents through various methods to instill a healthy, holistic mindset. Community Life Plan activities 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 groups, community gardening, art classes, theatre, concerts, creative writing classes,

lectures, speakers focused on health topics, religious lectures, and dance classes are examples that wellness is a way of life within the community.

The Lumberton Junior Women's Service League, Chestnut Street United Methodist Church, First Presbyterian Church, First Baptist Church, and St. Pauls BETA Club have volunteered to lead activities for Wesley Pines residents. The groups held BINGO, singalongs, Bible Studies, and other fun events. Lumberton First Baptist Church Youth, and St. Pauls High School BETA Club also visited with residents. These groups host Bingo games, play trivia games with residents, and assist with addressing Christmas cards for residents.

Residents from all levels of care enjoy participating in the Creative Writing Class led by Jill McCorkle. Jill meets with residents monthly to encourage and inspire them to write their life stories. Jill is a Lumberton native, a New York Times bestselling author, and has taught at UNC-Chapel Hill, Tufts, and Brandeis.

Throughout the year, there are several activities that occur, but most notably during 2022 were the Gospel Strings Blue Grass Band, the Calabash Day trip, Whiteville Day trip with shopping and lunch at Dale's Seafood, Pink Out For Breast Cancer, National World Smile Day, and movie outings to Hope Mills to watch "Elvis" and "Where the Crawdads Sing." One of the most exciting weeks in the Health Center is National Nursing Home Week. In 2022, each department hosted an activity each day of the week that showcased the department's hidden creativity.

The Community Life Services Department hosted a Halloween Trick or Treat event for children and grandchildren of the community's residents and staff. Each participant was given a treat bag. The event was even more fun since the staff dressed and held a costume contest as well.

James Sandrock, Food and Beverage Director, was happy to have residents back in the dining rooms for the holidays. This was the first year that residents were able to enjoy both Thanksgiving and Christmas meals in each venue since the 2019 season. James and Dining Supervisor, Christy Oxendine, led their team in making the holidays extra special by preparing delicious feasts for both occasions. Environmental Services Supervisor, Tiffany Hardee, also helped with preparing and decorating for the events.

During the year, holiday season outings included an outing to the LuMil Vineyard Christmas Lights for all

levels of care, followed by a special visit to the home of Charles Davis, Plant Operations Director, to receive treats from him and his family. The resident Christmas dinner was an amazing dining experience for assisted and independent living residents followed by a duo performance from the Fayetteville Symphony Orchestra. During the holidays, the community was visited by the Grinch and Mrs. Claus, had an Ugly Christmas Sweater Parade, attended the 11th Annual A Robeson County Christmas Show at the Carolina Civic Center, had a concert performance by the Second Time Around Band, enjoyed Cocoa, Cookies, and Christmas Stories, as well as a visit to Chestnut Street Methodist Church for the Wonder of the Nativity.

To end the year, Stephanie Ward began her Heartfelt Connections training. The LCS Signature Program is grounded in a person-centered care approach for individuals living with dementia that celebrates not just who these individuals are, but also who they were, and who they can still become. While Wesley Pines does not have Memory Care, the community understands the benefit of the program and reached bronze status in late December 2022 with the goal of training all staff members in 2023.

AWARDS & ACCOLADES

Wesley Pines was awarded The *Robesonian Reader's* Choice Award for Best Retirement Community and the *Robeson Living Magazine* Best Assisted Living for several years running.

Human Resources Director Allen Lloyd reports that during Spring 2022, an Employee Satisfaction Survey was completed which revealed very favorable scores and higher than LCS benchmarks. The highest scoring factors were 1) I have respect for my supervisor, 2) I know what is expected, and 3) I feel good about work. The noted areas of strength were 1) I will work here in three years, 2) I am given the necessary tools for the job, 3) I have respect for my supervisor, and 4) I am paid a competitive wage.

The LCS SalesFIRST approach focuses on developing a sales culture in which occupancy is prioritized thus enabling the community to serve more seniors, exceed client expectations, and deliver on our promise. Aligned with the LCS Principles, business decisions made at the community level and across all business lines, functional areas, and divisions consider the impact on sales first. During the annual LCS SalesFIRST Scorecard review, Wesley Pines received a score of 118 out of 120 points. The score was the highest within LCS.



Left to right: Executive Director Amy Shooter helps congratulate Mrs. Maxine Amos on receiving the Governor's Volunteer Award presented by Representative Charles Graham.

EVENTS & COMMUNITY IMPACT

Wesley Pines was unable to hold large gatherings and events for most of the year due to the continued impact of the pandemic. The biggest event was the Veterans Day Celebration that was held on Sunday, November 6th, outdoors on the campus near the front entrance of the main building. Rev. Gary Deese was the Master of Ceremony. Music was provided by Berea Baptist Church of Pembroke and Dr. Curt Locklear, and guest speaker Sherry Loftin. Larry Cummings, who is a resident of the community, sang the closing song, and his brother Rev. Dufrain Cummings led the invocation. The highlight of the event was the live paratrooper jump in presenting the American flag by All Veteran Group.

Our community has found many other ways to make an impact on our greater community through various fundraising events. A Thanksgiving food drive was held with 256 pounds of food items donated to the Robeson County Church and Community Center. The fundraiser for the Odom Home, which is a ministry of the Baptist Children's Homes of North Carolina was held to collect sweatshirts, laundry pods, hygiene products, socks, and toboggans for the orphaned youth. Wesley Pines raised \$1,200 for the Alzheimer's Association at the Fayetteville Walk to End Alzheimer's.

Article written by Wesley Pines Executive Director Amy Shooter.

WESLEY RIDGE

LUMBERTON, NC | JENNIFER HATCHER, 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 Advisory Board: Left to Right: Mrs. Phyllis Pate, Wesley Pines Residents' Association President; Ms. Melissa Humphrey, Wesley Ridge Resident; Ms. Pat Smith, Senior Property Manager, PPM; Ms. Clyde McKee, Wesley Pines Resident; Ms. Jennifer Hatcher, Wesley Ridge Site Manager; Mr. Mark Horton, Director of Property Management, PPM. Not Pictured: Mr. Jonathan Erickson, UMRH Corporate Executive Director; Ms. Amy Shooter, Wesley Pines Executive Director. (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 \$27,480 for a single person

and \$31,440 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. Jennifer Hatcher is the manager of the community, and Mrs. Patricia Smith 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

Danielle Brown, Marketing Counselor
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

Jennifer Hatcher, Manager
990 Wesley Pines Rd. • Lumberton, NC 28358
(910) 618-0361 • wesleyridge@partnershipppm.com
www.umrh.org/wesley-ridge

UMRH FOUNDATION

October 1, 2021–September 30, 2022



Caleb W. Baker
*UMRH Director of
Development*

As life slowly begins to reopen to a “new normal,” we are delighted to see faces again and have the chance to interact with each other, whether it be residents, colleagues, community members, or friends. An in-person meeting takes on a different feeling than all the Zoom calls. While we are grateful for technology, it sure is lovely to give someone a handshake, hug, or high five, isn’t it? In all these times, we are thankful.

We are grateful for donors like you. It is because of you and your contributions that the Foundation continues to thrive. Thank you for your confidence and continued support in the mission of The United Methodist Retirement Homes, Inc.

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), Croasdaile Village, Cypress Glen, and Wesley Pines. Donors contribute to our commitment to all aspects of wellness at our 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 2022, donors gave to the UMRH Foundation and UMRH gifts totaling \$2,555,907. (Is that a misprint? No, you read that correctly.) Faithful donors continue to lead the charge and build excitement around philanthropy in our communities.

HIGHLIGHTS OF GIVING

- A \$2 million-dollar anonymous gift for the Enhanced Medical Care of Residents of Cypress Glen. This is the

largest gift ever received by UMRH and was given by a deeply caring and faithful individual.

- Additionally, an anonymous donor gave a stock gift of \$92,000 to support Cypress Glen with the money to be used for improvements including a new van with wheelchair ramp, a fire gate, handrails for the stage, and a robotic food server.
- Mrs. Maxine Amos gave the initial gift of \$10,000 to fund the Louie M. and Maxine Locklear Amos Employee Scholarship Fund at Wesley Pines. This scholarship will help employees further their education in their fields of study. It is the first scholarship of its kind at Wesley Pines for their employees.
- Mr. Arnold Bragg, Jr., gave a qualified charitable distribution of \$10,000 in memory of his late father, A. Watts Bragg, Sr., to support the Knott Scholarship at Croasdaile Village.
- Mr. and Mrs. Dan and Linda Barker gave a \$7,000 gift of mutual funds to support the Benevolent Care Annual Fund at Croasdaile Village.
- For the 2022 Golf Tournament, played in October 2022, we raised \$25,440, clearing just over \$19,000 to support benevolent care. The weather was perfect, and all the teams played well and had a great time. Although, sadly, no one was able to hit the hole-in-one on hole 17, which would have resulted in a large prize for both the golfer and the Foundation.
- Our year-end appeal letter, sent out in December 2021, brought in \$38,770 to support the benevolent care.
- The North Carolina Conference of the United Methodist Church supported our work in benevolent care with its gift of \$28,000 from their Mission’s budget.
- Our Mother’s Day Offering, which is a long-standing giving tradition with the Methodist Churches in our conference, gave us \$16,843.
- Each community celebrated the holidays with a Tree of Love. Angels are placed on the tree for \$5 each. We are grateful for the generous participation at all our communities. Gifts are made in memory or honor of loved ones, family, friends, and staff. Gifts from all



Executive Chef Darrell Weldon loves to create unique dining experiences for Cypress Glen residents and guests. Sandy Matthews appreciates his delicious dishes!



Reid Parrott has time to relax and enjoy a stress-free lifestyle as a Cypress Glen resident. He welcomes others to do the same!

communities totaled \$3,764. Croasdaile Village raised \$1,683, Wesley Pines raised \$1,573 (including a \$1,000 Tree of Love gift from a single donor), and Cypress Glen raised \$553. All money raised from the Tree of Love support benevolent care across UMRH communities.

GET INVOLVED

You may be saying to yourself: "These are all fascinating gifts, but how can I 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 the funds to be utilized.
- Give a gift of appreciated stock and avoid having to worry about those dreaded capital gains.
- You can direct money 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.
- Own land that you don't need anymore? We accept gifts of real estate. Once we sell the property, we use the money for the agreed upon purpose.
- Time to part with your car? Let us take care of it for

- you. Often times, we received a car from a resident and post the car for sale internally within the community so that an employee can purchase it. It is 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.
- The Foundation also accepts works of art, musical instruments, golf carts, or other personal property to support our mission.

Some of the most generous gifts to the UMRH Foundation, UMRH, Wesley Pines, Cypress Glen, and Croasdaile Village are from supporters who make an estate gift by will, trust, charitable gift annuity, beneficiary declaration in an insurance policy or qualified retirement plan, a pay on death account, among other methods. When planning to leave your legacy, consider the following ways to support the UMRH:

Consider a Future Gift:

- Consider adding UMRH as a beneficiary in your will, IRA, life insurance policy, or trust.

Gifts that Generate Income:

- Set up a Charitable Gift Annuity through the Foundation that will provide you with a guaranteed income, tax benefit, and be a donation to the Foundation.
- 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.



The 2022 Golf Tournament Winning Team was Colonial Craftsman of Wilson, N.C. Members were (left to right) Sandy Lamm, Jerry Dellinger, Mickey Grizzard, and Fred Height, III.



James Sanes, Croasdaile Village Plant Operations Director, enjoys playing in the 2022 Golf Tournament with Rusty Kiddoo, Craig and Kyle Jackson of the BERCON Contracting, Inc. team.

Lend a Hand:

- Volunteer, play in, or sponsor a hole in the 24th Annual UMRH Golf Tournament. This year's tournament will be held Monday, October 23rd, 2023, at Hillandale Golf Course in Durham, N.C.

Naming opportunities are available to those who wish for long-term recognition of friends or loved ones. Namings 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 the Trustees to approve them for use where needed most.

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 some sample wording. We would be happy to work with you if you need additional wording for a more specific gift.

For Outright Gifts:

"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 [\$XX 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]."

For Contingent:

"In the event that [name of beneficiary] does not survive, I give devise and bequeath the deceased beneficiary's gift to UMRHF."

SCHOLARSHIPS

Croasdaile Village

Dr. Jack Fassett and the late Betty Fassett, Croasdaile Village residents, established the John D. Fassett Endowment for Croasdaile Village Employee Scholarships in 2001. 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!

The late Dr. Garland Knott established the Kathleen Knott Scholarships in Healthcare Education in appreciation for the loving care to his late wife, Kathleen, received in the Pavilion Healthcare Center. 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



Doris Hall, Rev. Bob Mangum, and John Sinkhorn enjoy reminiscing in their rocking chairs during a summer afternoon.

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.

The Matthews Scholarship Awards are made possible by Mrs. Betty Matthews, the late Mrs. Kathleen Matthews, and other Croasdaile Village resident donors. Matthews Scholarships are open to qualifying employees enrolled in any curriculum as approved by the UMRH Foundation Scholarship Committee. The late Mrs. Betty Matthews and Mr. Edward C. Matthews, her late husband, have made provisions through a charitable remainder trust to fund the Edward C. and Betty M. Matthews Employee Scholarship Endowment.

Cypress Glen

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' Council 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.



Sarah and Carolyn Britt take an early morning stroll at Wesley Pines.

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 and Marjorie Wright Staff Education and Training Endowment is getting up and running at Cypress Glen. The late Marjorie and Ernest Wright were long-time 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

Our newest scholarship is the Louie M. and Maxine Locklear Amos Scholarship at Wesley Pines. This scholarship will provide assistance to employees of Wesley Pines, who are pursuing further education.

WITH GRATITUDE

As you can see, there are **MANY** different areas that you can support the work of UMRH and its communities, **MANY** ways of supporting, and **MANY** grateful people for what you can contribute. The UMRH Foundation is grateful to all of these donors – some during their lifetime and some through an estate gift – who had the interests of residents at heart through their legacy. Their gifts are making an immeasurable impact on the quality of life and well-being of residents.

DONOR THANKS

OCTOBER 1, 2021 THRU
SEPTEMBER 30, 2022

*Your generous donations
have been a great support
to The UMRH, Inc.,
communities for 2021-2022.*



INDIVIDUAL DONORS FOR FISCAL YEAR 2022

Mr. & Mrs. Julius D. Adams

Aldersgate Ct / Barratt's Chapel
Neighbors

Ms. Gail K. Allen

Mrs. Donna M. Amaya

Ms. Nancy Y. Anderson

Ms. Ruthann P. Anderson

Mr. & Mrs. Robert Atwell

Ms. Nancy B. Aycock

Dr. & Mrs. Clifford Baggett

Ms. Gertie Ballou

Mr. & Mrs. Robert W. Barber

Mr. Daniel Barker

Mr. & Mrs. Marvin L. Barnes

Mr. & Mrs. Curtis Barnhill

Ms. Kathie A. Beckman

Ms. Amy A. Bell

Ms. Mercedes Bell

Mr. & Mrs. Vern Bell

Mrs. Connie Belmore

Ms. Anne Berkley

Mr. & Mrs. D. M. Biggs

Mr. & Mrs. Henry Boll

Ms. Diana D. Bowman

Mr. Arnold W. Bragg, Jr.

Ms. Barbara Branson

Mrs. Betty Briner

Mrs. Sandra Brooks

Mrs. Jo Brown

Mr. & Mrs. Price A. Browne, Jr.

Mr. & Mrs. James Buckner

Ms. Katherine S. Burden

Mr. & Mrs. Rollin Burhans

Mr. & Mrs. Heyward Calvert

Mrs. Naomi L. Camnitz

Mrs. Carolyn Carle

Mr. John L. Carlin, Jr.

Ms. Beth Carmical

Dr. & Mrs. Jack Carroll

Dr. & Mrs. Jim Carter

Ms. Mary Lou Carter

Mrs. Patricia M. Chadwick

Mr. & Mrs. John D. Chaffee

Ms. Deborah Chapman

Mr. & Mrs. Warren Charlton

Mrs. Sally P. Citrini

Ms. Linda C. Clack



Ms. Marie T. Collins
 Mr. & Mrs. Bobby E. Cooley
 Ms. Carolyn P. Coolidge-Riggs
 Mr. & Mrs. Gene Crabtree
 Ms. Jean E. Crisp
 Ms. Chicita Culberson
 Mr. & Mrs. C. Stephen Davis
 Mr. Luther J. Davis, Jr.
 Mrs. Norma Davis
 Mr. & Mrs. Laurence DeCarolis
 Mrs. Merial R. Depasquale
 Mr. & Mrs. Bobby J. Dixon
 Mr. & Mrs. Richard L. Drach
 Mrs. Claudia Dreitzler
 Mr. & Mrs. David B. Duane
 Mr. & Mrs. Sydney Dursse, IV

Mr. & Mrs. James J. Edmundson
 Mr. & Mrs. Jonathan Erickson
 Mr. & Mrs. Bruce Evans
 Mr. David A. Evans, Jr.
 Ms. Serena P. Fisher
 Ms. Erline Fleming
 Mrs. Ruth Fleming
 Ms. Kathleen P. Fogarty
 Mrs. Lucia P. Forthofer
 Mr. & Mrs. Jerry Gambill
 Mrs. Evelyn A. Gatchel
 Rev. & Mrs. Brian G. Gentle
 Mr. & Mrs. David Gentry
 Ms. Gloria Glenn
 Ms. Marie H. Grauerholz
 Mr. James E. Gray

Mr. & Mrs. Gerry M. Green, Jr.
 Dr. & Mrs. Jerry Gregory
 Mr. & Mrs. Wade Gresham
 Mr. Eugene W. Hackney
 Mr. Sam Hagedon
 Mr. & Mrs. Carl Hamill
 Mrs. Peggy Hammond
 Rev. Kathy Harper
 Mr. C. Douglas Hartsell
 Ms. Joan Hazirjian
 Mr. & Mrs. Lawrence D. Hedgepeth
 Mr. Charles B. Henderson
 Mr. Duncan Heron
 Dr. Erwin Hester
 Mr. & Mrs. T. Spencer Hill
 Mrs. Anna W. Holloman
 Ms. Dorothy Hornsby
 Mr. & Mrs. Everett J. Hughes
 Mr. Matt Huneycutt
 Mr. & Mrs. George G. Hunt
 Mrs. Elizabeth W. Jenkins
 Mr. & Mrs. Bruce F. Jobe
 Mr. Philip T. Johnson
 Mrs. Ann N. Jones
 Ms. Elisa Jones
 Ms. Mary C. Keech
 Mrs. Alice Kellar
 Mr. & Mrs. William E. King
 Mrs. Janet S. Kistler
 Ms. Dona J. Koeberl
 Mr. & Mrs. Gus P. Kolas
 Mr. Norman H. Krause
 Dr. Penelope Laing
 Mrs. Mary L. Lamm
 Ms. Angelika Langen

Mr. & Mrs. Wingate Lassiter
 Ms. Susan Y. Leggett
 Mr. Kevin Lemaire
 Mr. & Mrs. Benjamin Lennon
 Mrs. Naomi Leubuscher
 Mr. John T. Lindley
 Mr. Craig Lloyd
 Mr. & Mrs. Jonathan M. Lloyd
 Mr. & Mrs. Tom Loftis
 Ms. Sally Longacre
 Mr. James Lore
 Mrs. Nancy Lutes
 Mr. & Mrs. August J. Madison
 Mrs. Katie Madray
 Mr. & Mrs. Neal Mahan
 Mrs. Shirley J. Mallard
 Ms. Nancy S. Marks
 Mr. & Mrs. David G. Martin
 Dr. & Mrs. Carle W. Mason, Jr.
 Ms. Kathleen G. Matthews
 Mr. & Mrs. Richard McCleery
 Mr. & Mrs. A.J. McClure
 Mr. & Mrs. Bobby G. McMahan
 Mr. Zeb V. McMillan, Jr.
 Mrs. Betsey F. Miller
 Mrs. Cheryl P. Miller
 Ms. Della F. Mol
 Mrs. Nancy G. Monroe
 Ms. Dorothy L. Moore
 Ms. Patricia M. Moore
 Mr. & Mrs. Thomas H. Morris
 Mr. William Mottis
 Mr. & Mrs. Fred Mowry
 Ms. Beth M. Moyer
 Mr. & Mrs. James H. Mullen III



Mr. & Mrs. Terry A. Murphy
 Ms. Sharron Nance
 Ms. Mary G. Narron
 Mr. & Mrs. Marvin Neuwirth
 Mr. & Mrs. Richard J. O'Connor
 Mr. & Mrs. H. L. Ormond, Jr.
 Dr. George M. Paddison
 Mr. George Parker
 Mr. & Mrs. Mack Parker
 Mr. & Mrs. J. Robert Passmore
 Dr. & Mrs. Charles W. Patterson
 Mr. & Mrs. David Pendleton
 Mrs. Nancy S. Perkins
 Ms. Gail Perry
 Ms. Patricia L. Pertalion
 Mr. William Peters

Dr. & Mrs. Reginald Ponder
 Mrs. Lucia H. Powe
 Mr. William C. Powell
 Mrs. Barbara W. Pray
 Mr. & Mrs. Archibald Provan
 Dr. Louis D. Quin
 Mrs. Doris K. Reed
 Mr. & Mrs. Jacland Reville
 Mrs. Margaret B. Richardson
 Mrs. Carol B. Rist
 Dr. Hugh Robinson
 Mr. Artie Rogers
 Mr. & Mrs. Thomas J. Rollins
 Mr. & Mrs. Guerry B. Russell
 Mr. & Mrs. James Sakell
 Ms. Shirley H. Salzano



Mr. & Mrs. E G. Sanders
 Mr. Timothy W. Sawinska
 Mr. & Mrs. Robert A. Scappini
 Mr. & Mrs. Richard Schulke
 Mr. & Mrs. Thomas Scoopmire
 Mrs. Linda K. Scott
 Mr. & Mrs. William E. Self
 Mrs. Janet Shafer
 Mrs. Sophie S. Shiffman
 Mr. & Mrs. Alexander Silbiger
 Ms. Amy G. Skallerup
 Mr. & Mrs. Alton L. Smith
 Ms. Betsy K. Smith
 Mr. & Mrs. Edward C. Smith
 Mr. Jerry & Dr. Ann Smith
 Mrs. Mary L. Smith

Mr. & Mrs. William E. Smith
 Rev. & Mrs. H. Gray Southern
 Mrs. Betty S. Speir
 Mrs. Laurie H. Stallings
 Dr. & Mrs. Boyd Strain
 Mrs. Barbara B. Strohhahn
 Mr. & Mrs. William H. Taft, Jr.
 Mr. & Mrs. Ken Taylor, Jr.
 Ms. Winifred Tegge
 The G. G. Zastrow Family
 Mr. & Mrs. Don Thompson
 Mr. & Mrs. John W. Thompson
 Mr. Kent Thompson
 Ms. Linda H. Titus
 Mr. & Mrs. Virgil M. Torbert
 Dr. James L. Travis III

Ms. Nancy J. Van Antwerp
 Dr. & Mrs. Vernon B. Van Bruggen
 Mr. & Mrs. Hunter Wagstaff
 Mrs. Barbara K. Walker
 Ms. Debra C. Wallace
 Mr. & Mrs. David D. Ward
 Mr. & Mrs. Kevin C. Ward
 Ms. Marilyn A. Ward
 Mr. & Mrs. Bucky Waters
 Mrs. Sally Weil
 Mr. David Weismiller
 West Davisson Neighborhood
 Mr. & Mrs. Gary M. Whaley
 Mr. & Mrs. Don White
 Mr. & Mrs. John I. Willard
 Mr. & Mrs. Charles Woodall
 Ms. Emilie Woodward
 Mr. & Mrs. Glenwood W. Wooten
 Mr. Richard K. Worsley
 Mr. & Mrs. Leo I. Wynns, III
 Mr. & Mrs. Woody H. Yates
 Mr. Warren E. Zink

ORGANIZATION DONORS FOR FISCAL YEAR 2022

A Clean Look, Inc., Angier
 Affordable Blinds & Shutters,
 Mebane
 Albert DeWitt & Ruth Bryd
 Endowment
 Alex.Brown Institutional Consulting,
 Winston-Salem
 Amazon Smile Foundation
 Amity UMC, Chapel Hill
 Antioch UMC, Four Oaks
 Attane, Inc., Kansas City, MO

Barnes Family Foundation, Durham
 Beacon District
 Bellemont UMC, Burlington
 BERCON Contracting, Inc., Durham
 Bethany UMC, Conway
 Blanche Faith Francis Endowment
 Bojangle's- Tri-Arc Foods
 Braco Electric Company, Inc., Durham
 Brightview Landscape Services, Durham
 Brownings UMC, Mount Olive
 Brown's Chapel UMC, Pittsboro
 Capital Developers, LLC, Greenville
 Carolina Theatre, Durham
 The Cheesecake Factory, Durham
 Croasdaile Country Club, Durham
 Croasdaile Village Residents' Association, Durham
 Cypress Glen Residents' Council, Greenville
 Cypress Glen Spiritual Life, Greenville
 CVS Pharmacy
 Duke University Store, Durham
 Durham Coca-Cola, Durham
 Effortless Office
 Englewood UMC, Rocky Mount
 Eugene P. & Dorothy A. Palmer Endowment
 Fair Products, Inc., Cary
 Farmville UMC, Farmville
 First UMC, Wilson
 First UMC, Graham
 First UMC, Rocky Mount
 First UMC, Washington
 First UMC, Roanoke Rapids



First UMW, Henderson	Martin Wilson & Leah Fleming Bowman Endowment
FORVIS, Raleigh	MatrixCare
Frank L. Blum Construction Co., Raleigh	Morrison Senior Dining
Fresh Point	Museum of Life & Science, Durham
Front Street UMC, Burlington	Mutual of America, New York, NY
Halifax UMC, Halifax	Neil Medical Group, Cornelius
HealthPRO Heritage LLC, Greenville, SC	North Carolina Conference of the UMC, Garner
Henrietta Morris Williams Endowment	North Carolina Opera, Raleigh
Hillandale Golf Course, Durham	North Carolina State Fair, Raleigh
James & Flora Dean Endowment	North Carolina Symphony, Raleigh
Jerusalem UMC, Snow Hill	North Carolina Zoo, Asheboro
Johnie L. Joyce Endowment	North Raleigh UMM, Raleigh
Life Care Services, LLC, Charlotte	Offie & Ocie Hathaway Endowment
Life Care Services Development, Des Moines, IA	Oppenheimer, Winston-Salem
	Oriental Trading Co., Omaha, NE



Our State Magazine

Pamlico UMC, New Bern

Partnership Property Management,
Greensboro

Phillips Chapel UMC, Graham

Pleasant Hill UMC, Pittsboro

Pledgeling Foundation, Venice, CA

Pollocksville UMC, Pollocksville

Raymond E. & Naomi C. Dungan
Foundation, Inc., Durham

Rev. & Mrs. Marion O. Stephenson
Memorial Endowment

Rose Hill UMC, Rose Hill

S. G. Wilkerson & Sons, Inc.,
Greenville

SERVPRO of South Durham &
Orange County

Severn UMC, Conway

SFCS, Inc., Charlotte

Spellman Brady & Company, St.
Louis, MO

St. Paul UMC, Rocky Mount

T. D. Baker Plumbing, Inc.,
Timberlake

Tabernacle UMC, Pikeville

Tabor UMC, Littleton

The Colonial Craftsman, Wilson

The Winston-Salem Foundation,
Winston-Salem

Trinity UMC, Durham

Truist, Greensboro

Turner Asphalt, Inc., Raleigh

Universal Leaf North America,
Nashville

USI Benefits

Verona UMC, Jacksonville

Vision Financial Federal Credit
Union, Durham

Walnut Grove UMC, Hurdle Mills

Walter & Gertrude Simmons
Endowment

Warren-Hay Mechanical Contractors,
Inc., Hillsborough

Wesley Chapel UMC, Kenansville

Wesley Memorial UMW, Wilmington

Westminster UMC, Kinston

Wharton Trinity UMC, Washington

Womble Bond Dickinson, LLP,
Winston-Salem

Ziegler Investment Banking, Glen
Allen, VA

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

FOUNDATION ETHICS AND DONOR PROTECTION

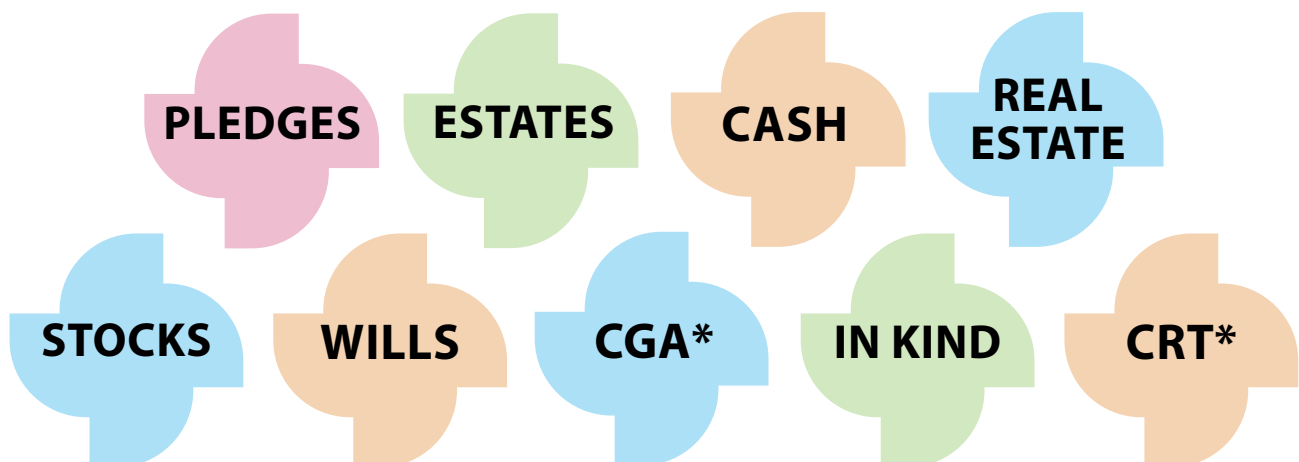
The Foundation and its volunteer and staff representatives always consider the interests of the donors as the first priority in planning gifts. Information learned by any representative of the Foundation about a donor or the donor's assets or philanthropic intentions is held in strict confidence. It 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.

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.

WAYS TO GIVE



* CGA: Charitable Gift Annuity CRT: Charitable Remainder Trust

UMRH.ORG

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



Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at (919) 814-5400. The license is not an endorsement by the State.

