



# 2021 ANNUAL REPORT

THE UNITED METHODIST RETIREMENT HOMES, INC.

[UMRH.ORG](http://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:

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

## UMRH CORPORATE OFFICE

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Jonathan Erickson, Caleb Baker, Stacy Dobson, Cheryl Miller, Heather March, Rebecca Marion Grady,  
Laurie Stallings, Anna Holloman, Elizabeth Jenkins, Howard DeWitt, Amy Shooter

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**Deborah Montague**  
UMRH Board  
Chairman

## ***It is our pleasure to introduce to you the 2021 Annual Report.***

Who would have thought that we would have to endure another year of the pandemic. The teams stayed diligent. We applauded 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 seemingly never-ending obstacles endured. 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 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 third



**Jonathan Erickson**  
UMRH Corporate  
Executive Director

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.



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 over-all 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, continued to meet through video calls. As some of the restrictions lessened, we were able to utilize the wonderful common areas as distancing would allow.

As we are interconnected to the 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 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 and Cypress Glen expansions, 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, and others. These contributions play a significant role in our ability to provide benevolent care and improve resident life.

We are grateful for the faithful service and leadership of Wade Rozier who served Wesley Pines for 17 years. During his tenure, Wesley Pines saw a rebirth in a new assisted living, skilled nursing and common area building. We welcomed back an old friend in Howard DeWitt, retired Croasdaile Village Executive Director, who agreed to serve as Wesley Pines Interim Executive Director. Rebecca Marion Grady, Croasdaile Village Associate Executive Director, also provided needed support during the transition.

## **UMRH AND FOUNDATION BOARD OF TRUSTEES AND DIRECTORS**



**Top Row – Left to Right:** Deborah Montague, UMRH Board Chairman; Nancy Van Antwerp, Secretary; Tom Steele, Treasurer; Carl Hardy; Lee Harriss; Michael Hardin; Kathryn Bradley; Rev. Paul Lee; Rev. Gray Southern; Barbara Hastings, Croasdaile Village Residents Association President. **Middle Row – Left to Right:** Ruth Read, Wesley Pines Residents' Council President; Jo Brown, Cypress Glen Residents' Council President; Jonathan Erickson, UMRH Corporate Executive Director; Stacy Dobson, UMRH Chief Financial Officer; Caleb Baker, UMRH Director of Development; Beth Nichols, UMRH Recording Secretary; Heather March, Croasdaile Village Executive Director; Rebecca Marion Grady, Croasdaile Village Associate Executive Director; Jennifer Reagan, Croasdaile Village Healthcare Administrator; Laurie Stallings, Cypress Glen Executive Director. **Bottom Row – Left to Right:** Wade Rozier, Wesley Pines Executive Director; Howard DeWitt, Wesley Pines Interim Executive Director; Dr. Richard Evans, Cypress Glen Local Committee Chair. **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, 2021, 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.



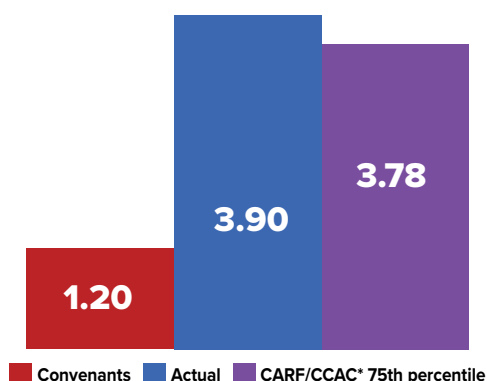
*In 2021, Cypress Glen continued to help fight Alzheimer's through the Walk to End Alzheimer's.*

**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.

## 2021 FINANCIAL ACHIEVEMENTS

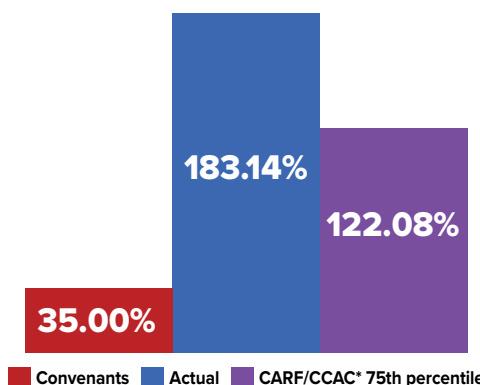
**UMRH, Inc.**  
**Debt Service Coverage Ratio**



■ Covenants ■ Actual ■ CARF/CCAC\* 75th percentile

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.

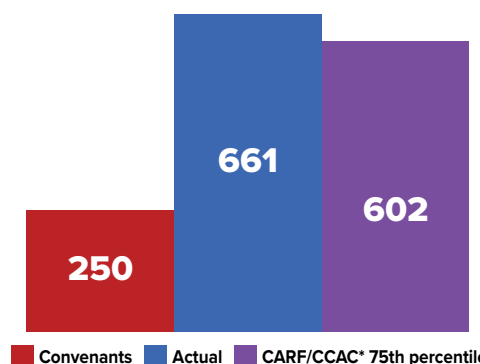
**UMRH, Inc.**  
**Cash to Debt Ratio**



■ Covenants ■ Actual ■ CARF/CCAC\* 75th percentile

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**



■ Covenants ■ Actual ■ CARF/CCAC\* 75th percentile

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  
Consolidated Balance Sheets  
As of September 30, 2021**

**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, 2021**

<b>ASSETS</b>	
<b>Current Assets</b>	
Cash	\$8,745,863
Contributions receivable, current portion	24,721
Investments	89,249,575
Assets limited as to use, current portion	3,097,558
Accounts receivable, net of allowance for uncollectible accounts (\$310,000 and \$298,000 in 2021 and 2020, respectively)	3,652,948
Other receivables	2,002,041
Inventories	131,679
Prepaid expenses and other current assets	1,188,405
Total current assets	<u>108,092,990</u>
<b>Non-Current Assets</b>	
Assets limited as to use, net of current portion	31,367,370
Investments - restricted	9,643,224
Assets held for resale	215,827
Property and equipment, net	204,684,302
Trusts receivable	156,312
Deferred marketing costs, net	116,127
Total non-current assets	<u>246,183,162</u>
Total assets	<u>354,276,152</u>
<b>LIABILITIES AND NET ASSETS</b>	
<b>Current Liabilities</b>	
Annuity payable, current portion	108,013
Bonds payable, current portion	4,540,000
Accounts payable	4,835,876
Accrued salaries and related expenses	2,374,227
Accrued interest payable	2,713,381
Provider relief advanced funding	605,600
Total current liabilities	<u>15,177,097</u>
<b>Long-Term Liabilities</b>	
Annuity payable, less current portion	623,436
Bonds payable, less current portion	140,012,208
Liability to other foundations	8,732
Liability for refundable advance fees	14,066,851
Deferred revenue from non-refundable advance fees	73,374,773
Funds held for others	186,895
Interest rate swap agreements	190,745
Total long-term liabilities	<u>228,463,640</u>
Total liabilities	<u>243,640,737</u>
<b>Net Assets</b>	
Without donor restrictions	98,067,336
With donor restrictions	12,568,079
Total net assets	<u>110,635,415</u>
Total liabilities and net assets	<u>354,276,152</u>

<b>REVENUE</b>	
Revenues, gains, and other support without donor restrictions	
Net resident and patient service revenue	65,170,743
Amortization of advance fees	9,619,811
Net assets released from restriction	526,923
Other	25,952
Interest and dividend income	3,309,597
Total revenues, gains and other support	<u>78,653,026</u>
<b>EXPENSES</b>	
Nursing services	18,303,465
Dietary and food services	10,569,171
Administration	11,868,219
Plant operations, maintenance and security	6,779,268
Laundry and housekeeping	3,939,925
Resident services - activities	2,594,140
Home care	3,311,602
Interest	5,722,547
Depreciation and amortization	13,704,313
Bad debt expense	110,471
Total expenses	<u>76,903,121</u>
Operating income	<u>1,749,905</u>
<b>NON-OPERATING GAINS / (LOSSES)</b>	
Net investment gains, realized	2,910,694
Net investment gains, unrealized	3,982,754
Provider relief funding	1,130,698
Loss on disposal of property and equipment	(116,109)
Contributions	30,633
Construction related marketing costs	(144,505)
Change in fair value of interest rate swap agreement	186,280
Other	(3,005)
Net non-operating gains	<u>7,977,440</u>
Excess of revenues, gains and other support over expenses	9,727,345
Net assets released from restrictions for purchase of property and equipment	130,103
Change in net assets without donor restrictions	<u>9,857,448</u>
<b>CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS</b>	
Contributions	1,022,201
Interest and dividend income	311,474
Net investment gains	1,521,571
Change in split interest agreement	240,246
Change in value of pledges	(27,891)
Recovery of bad debt expense	2,927
Net assets released from restrictions	(657,026)
Change in net assets with donor restrictions	<u>2,413,502</u>
Change in net assets	12,270,950
Net assets, beginning of year	<u>98,364,465</u>
Net assets, end of year	<u>110,635,415</u>



# CROASDAILE VILLAGE

DURHAM, NC | HEATHER MARCH, EXECUTIVE DIRECTOR

**COMMUNITY BENEFIT: \$37,160**

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

**BENEVOLENCE PROVIDED: \$2,871,791**

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



**CROASDAILE VILLAGE** even though we have been in the middle of a pandemic and a staffing crisis, we have had so many positive things occur this year.

The year began with hope and joy as we were able to host our first COVID vaccination clinic on January 3, 2021. Croasdaile Village partnered with CVS Pharmacy under a federal contract to offer three on-site clinics for our employees and health care residents. We encountered a challenge when CVS informed us that we could not include our Independent Living residents in the initial vaccination clinics. Distraught by this challenge, we pressed on to find another vaccination source for our Independent Living residents. Fortunately, Duke University Health Systems answered our request, and we successfully orchestrated a 400-resident vaccination clinic in February. We continued to partner with pharmacy vendors throughout the year so that our employees could receive the vaccine as they were ready to do so. We enjoyed a quiet eight months of minimal COVID activity which allowed our team to breathe and take steps to returning to a form of normalcy. We did end the year with another surge of the COVID Omicron variant; however, this surge was less intense than in 2020 which confirmed that the global pandemic was slowly declining. We looked forward to continuing to move in the right direction towards a new normal that resembles pre-pandemic life.

## COMMUNITY BENEFIT

In 2021, Croasdaile Village provided benevolent care to 36 residents that totaled \$829,560. The Pavilion Health Center provided 6,462 days of nursing care to Medicaid recipients that totaled \$688,409.

Before the Heritage Hall demolition, we donated cabinets, furniture, sinks, and granite counter tops to the Habitat for Humanity. We also donated tables, chairs, clothing, and household items to Henderson Towers. Although we cannot put a monetary value on this, we permitted the Durham County Fire Departments to use Heritage Hall for training. Every station in the county was part of this training, and they were in our community for weeks. They seldom get an opportunity to train in a building the size of Heritage, and we were happy to provide the space they needed.

Croasdaile Village has a partnership with many local entities who know they can count on us to work with them as their needs arise. In 2021, despite our limitations in having some of those partners physically present on campus, we were still able to serve the community. We gave carloads of assorted household items to the Scrap Exchange.

*Pictured above: (left to right): Wilbur Heflin, Croasdaile Village resident; Dr. Baines and Mr. and Mrs. Morgan enjoying each other's company in the Pub.*



*Durham County Fire Department held training exercises in the Heritage Hall Building before the demolition.*

## CONSTRUCTION UPDATE

While it was sad for some residents and employees to see Heritage Hall demolished, the response to the new building that is currently under construction (also affectionately known as The Heritage) has been exceptional. Our wait list continues to grow, and we were nominated as the Best Retirement Community in the Triangle by Indy Week for 2021.

We completed the new Memory Support Assisted Living building and moved residents in from other levels of care during the month of April. As part of that building, we focused on implementing guidance from a Life Care Services Program called “Heartfelt Connections” which has a heavy emphasis on caring for those with dementia or other cognitive impairments that the residents may face. We completed the elements of the “Heartfelt Connections” program and earned the top tier “Gold” status through the Life Care Services standard. Deon Simpson, our Assisted Living Administrator, is our



*Croasdaile Village continues to support the fight in the 2021 Walk to End Alzheimer's.*



*Croasdaile Village Executive Director Heather March on the Heritage Hall demolition team.*

“Heartfelt Connections” champion and did an excellent job leading our team members, residents, and family members through the implementation.

## PROGRAMS

Kim Broucksou, our Director of Home Care & Navigation, has been working with Carmelita Karhoff, retired Ombudsman and current Croasdaile Village resident, on the Dementia Inclusive Durham (DID) program. This program allows residents with cognitive challenges to get together with a trained professional and engage in conversations where there is no right or wrong answer but encourages creative thinking. This can be fun and sometimes funny but also helps stimulate residents to think in a way where they are not judged for wrong answers. This is part of a large grant through DID.

The residents and employees raised \$6,296.75 for the Alzheimer's Association this year.

Our chaplains performed numerous teachings, planning, and counseling services for various community churches, conferences, federations, board of directors, and the Duke Divinity School.

## EMPLOYEES AND AWARDS

We are excited to have promoted Jennifer Reagan from our Business Office Director into the Pavilion Healthcare Administrator role this year. At the beginning of the year, the Pavilion Health Center received a five-star rating from the Centers of Medicare and Medicaid Services (CMS). This accomplishment was a much-needed morale lifter after the 2020 pandemic challenges we faced. We also received a deficiency-free annual survey and the Life Care Services Mary Harrison award. We are proud of our healthcare team





*Croasdaile Village resident Jane Green at Sparks Park enjoying an outdoor workout.*



*Croasdaile Village National Pink Out Day supporting those impacted by breast cancer.*

and their continued dedication to our residents.

It has been a challenging first year for Executive Director Heather March and Associate Executive Director Rebecca Marion Grady in their new roles due to the staffing crisis and pandemic, but they were blessed to have seasoned department heads and the support of our Residents Association. Croasdaile Village would not be the community it is without all of these great individuals.

Kim Broucksou added to her responsibilities when the decision was made to merge the Navigation Department with our Home Care Department. For many years, the two departments have worked hand-in-hand when providing supportive services to our community residents. With the internal director shifts, it was the perfect opportunity to merge the two departments. We have seen growth and continuity of services improve with this department merge. Kim is supported by two additional Social Work/ Navigators in addition to the Home Care Department Clinical and Operational Team. We are excited to see the future of this program as it moves forward under one central leader.



*Erin Fines-Crawford  
Wellness Director*

## HEALTH AND WELLNESS

This past year marked the beginning of re-establishing our Wellness Program by opening our newly designed cardio-weight room, aerobics room, and Aquatic Center. With the expansion of

our population and increased awareness on health, we have also established a director role for our Wellness

Program. We have seen steadily increasing activity across the community. Our residents have enjoyed attending focused strength and balance training taught by our Wellness Director, Erin Fines-Crawford. These classes are offered weekly in each level of care. Our Life Enrichment Department partnered with our Wellness Committee to host a Fall Wellness Fair in Sparks Park which was highly attended. The Fair also brought awareness to our fundraising efforts for the Alzheimer's Association for which Croasdaile Village raised the highest amount in the history of the community. Lunch and learn events were held for our residents, providing them with specialized topics around functional aging and resources on campus.

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



*Rehab Generals:  
PTA Dave Perez and Alfred Hillard, COTA (Certified Occupational Therapy Assistant) Student*



# CYPRESS GLEN

GREENVILLE, NC | LAURIE STALLINGS, EXECUTIVE DIRECTOR

**COMMUNITY BENEFIT: \$295,304**

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

**BENEVOLENCE PROVIDED: \$585,020**

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



**CYPRESS GLEN** is a Life Plan/Continuing Care Community located in Greenville, N.C. The community is owned by The United Methodist Retirement Homes, Inc. (UMRH) and managed jointly by UMRH and Life Care Services, an award-winning national leader in senior housing and retirement services. The community is related by faith to the North Carolina Conference of the United Methodist Church and accepts seniors of all denominations and spiritual beliefs.

Cypress Glen has 212 independent living cottages, garden villas, and apartments. There are also 30 assisted living rooms, 30 long-term care/skilled rehab beds, and 12 rooms in a memory care cottage, providing specialized care for residents with dementia-related illnesses.

The community is within minutes of East Carolina University and Vidant Medical Center, a major medical and research center. Residents of Cypress Glen enjoy access to shopping centers, concerts, museums, art galleries, sporting events, and the arts. Day trips to points of interest across the state are planned monthly.

## COVID-19 PANDEMIC

In January 2021, Cypress Glen partnered with CVS to host an on-site clinic to provide Cypress Glen residents and

staff with the first dose of Moderna COVID-19 vaccine. The group collaborated again in February to give the second dose. When a booster shot was recommended, it was a Walmart pharmacy group who was available to provide the on-site vaccination in November.

The COVID-19 pandemic created many new and changing safety protocols and procedures, especially for retirement communities and nursing facilities. Following CMS, NCDHHS, and LCS recommendations, Cypress Glen staff continually adjusted each time the requirements shifted. The nationwide staffing shortage crisis affected the number of new applicants to fill vacant positions yet did not impact the Cypress Glen employees in upholding the community's promise to provide quality care and services. For continued safety of the community, gatehouse security personnel continued to screen all who entered the campus and new self-screening kiosks were installed at the multiple staff entrances.

Longtime resident Doris Reed noted the distinct advantages of living at Cypress Glen during the uncertain times of COVID-19. In speaking of her gratitude for the staff, she wrote, "Thank you for all you do to make life so pleasant each day and especially for going the extra mile to do so during the pandemic. We are so fortunate to live here."

*Pictured above (left to right): Cypress Glen resident Ron McCord travels Cypress Glen's beautiful 95-acre campus in style.; Cypress Glen residents Robin and Gene Clark are happy that Cypress Glen is a pet-friendly community.*

Due to COVID, annual surveys by NCDHSS were suspended, and instead, the surveyors were charged with the responsibility of doing on-site audits to ensure that skilled rehab communities were properly prepared for all aspects of infection control surveillance, practices, applicable policies, procedures, and staff training. Cypress Glen was reviewed during such a survey in 2021 and passed with flying colors. Moreover, NC Health & Human Services initiated another program called Regional Infection Prevention Support (RIPS). Though community participation was not required, Cypress Glen volunteered to participate in two RIPS audits. Though recommendations were made for improvements, the RIPS teams were impressed with the infection control program that was in place. As a token of appreciation for Cypress Glen's efforts and continued diligence, DHHS donated 100 tote bags and notepads displaying the NC state seal and their motto "Infection Prevention at Work Here" to give to the nurses and certified nursing assistants.

## TO BENEFIT THE GREATER COMMUNITY

Cypress Glen's Spiritual Life community gracefully experienced change in 2021. After 14 years of ministry as Chaplain, Reverend Karen Crutchfield retired while Reverend Connie Belmore took over to carry forward the rich traditions initiated in Karen's time at Cypress Glen. In June, we gradually began to regather in person for worship, resumed in-person meetings, and continued to consider how we might serve the surrounding community in new and different ways, while always focusing on those who are in most need of assistance. Prayer also remains a central part of spiritual life — a prayer basket is placed outside Brown Chapel to share in each other's lives with our praises and concerns, which are also lifted up during our Sunday worship service. In March, we distributed \$9,000 of our Sunday offerings to seventeen charitable organizations in Pitt County. The Mother's Day offering raised \$6,400. In September, we distributed an additional \$7,000 to ten organizations, to include a one-time donation to a local church destroyed by fire. In the midst of change and the continued presence of the pandemic, we have learned to cherish the past, embrace the here and now, and appreciate God's works in our lives. We look to 2022 with hopeful anticipation of the new ways God's Spirit will stir among us.

Cypress Glen, an active sponsor of the Alzheimer's Association's Walk to End Alzheimer's, participated in fundraising events for the eighth straight year. A t-shirt

sale, BINGO for Bucks game day, a resident-staff Family Feud competition, and direct contributions combined to total \$5,260. Cypress Glen has contributed over \$31,000 in their eight years of support. Memory Care Administrator Morgan Reese earned a position on the Walk to End Alzheimer's Sponsorship Committee in 2021. "Walk to End Alzheimer's" is the world's largest event to raise awareness and funds for Alzheimer's care, support, and research.

In early December, Cypress Glen and Ron Ayers Motorsports sponsored a Toy Run to collect toys for Toys for Tots and canned goods for the Food Bank of Central and Eastern North Carolina. The motorcyclists rode through the Cypress Glen campus and then gathered outdoors for cookies, hot cocoa, and fellowship. The residents and riders collected donated toys, canned goods, and monetary gifts totaling nearly \$5,000.

## DINING

A highlight of 2021 came in March when Cypress Glen hired Brent Riggs as the new Director of Dining Services. Brent came to the community with a wealth of knowledge and experience in food service management, including a position as General Manager of Vivian Howard's famed Chef and the Farmer and Boiler Room Oyster Bar restaurants in Kinston, N.C. Brent's youthful energy and enthusiasm was matched by his high expectation for hospitality, service, and quality. His fresh perspective and creative menu changes have been welcomed by the residents, who also appreciate his sommelier talents in providing the best wines for the community's new pub.

When COVID-19 safety protocols were first established, the eat-in dining venues were required to close. After more than two years of total meal service delivery and room service, the resident dining venues reopened on April 28. Table-side ordering tablets were adapted in 2021 for the dining room waitstaff, allowing them to work more efficiently; therefore, providing a higher level of service to the residents.

Dining services continued the popular monthly theme meal events in all levels of care. To name a few - Valentine's Day, Hollywood Night, St. Patrick's Day, a traditional French dinner, Men's Outdoor Steak Cookout, Hawaiian Night, and the always amazing, traditional Thanksgiving and Christmas dinners.

The fully renovated Stewart Café grill reopened in June to rave reviews. The beautiful and spacious café offers daily specials, an array of tasty salads, a regular grill menu (with the best cheeseburger in town!), large selections of fresh



*(Left to right) Cypress Glen residents Marcia Coles, Keith Johnson, and Sue Leggett gather for fellowship at Fred's Oasis.*

desserts and bakery items, and ice cream products. A wonderful gas-fired brick pizza oven provides hot, made-to-order pizzas. The Stewart Café is open for three meals a day, Monday through Saturday.

Fred's Oasis, the community's new pub space, which opened in September, have bartenders who serve not only a wide variety of beer and wine, but specialty coffees and creamy smoothies and milkshakes. Residents take pleasure in regular wine and beer tastings, Saturday night Gathering Group socials, trivia competition, karaoke, and parties.

## LIFE ENRICHMENT

For the first few months of 2021, Life Enrichment continued to host an abundance of resident socials in the spacious Cypress Glen front lobby, providing music and delicious food and drink. To the delight of everyone, off-campus excursions and large on-campus group gatherings resumed in early March. A few of the outings the residents enjoyed were the Washington and Beaufort waterfronts, Sylvan Heights Bird Park, and Wood Ducks baseball games in Kinston.

A favorite event of the year was a June trip to resident Earl Trevathan's Green Room Farm in Fountain, N.C., with entertainment by Lightning Wells and a mouth-watering BBQ chicken dinner prepared and catered by Cypress Glen dining services.

## MUSIC TO OUR EARS

Weekly group music therapy sessions were held in each of the healthcare areas (Assisted Living, Long Term Skilled Nursing Care and Memory Care) to improve socialization, cognitive, emotional, physiological, psychosocial, spiritual, and sensorimotor abilities.

The Silver Rhythms Drum Circle continued to grow throughout the year, and by the end of 2021, the group averaged between 15-20 residents meeting weekly for a time of socialization, communication, and physical well-being in the form of therapeutic drumming and playing of other percussion instruments.

Beginning in the summer, a new group of fans of all things PIANO was formed. The Keys Club has been a well-attended group, sharing their love of piano music. Another popular new program is Name That Tune Live, with musical themes such as radio music, hymns, and Broadway tunes. Concerts were presented by Debbie Pitts, MT-BC (Board Certified Music Therapist).

The Ringers of the Glen hand bell choir resumed in 2021 to perform at worship services and the Carols and Cocoa Christmas Sing Along.

## HEALTH & WELLNESS

Group in-person classes resumed on March 1, featuring morning stretch, yoga, Tai Chi, and fitness boxing. Zumba/Dancercise and Aerobic Beats classes were added later in the year. Monthly wellness presentations continued in the auditorium.

A new aerobic drumming class, The Aerobic Beats, began in 2021 as a joint effort Debbie Pitts and Wellness Coordinator Meghan Everhart Pedro. In this class, participants use classic drumsticks to drum on a yoga balance ball in rhythm to a variety of styles of music.

## STAFF EXCELLENCE & COMMUNITY INVOLVEMENT

In 2021, Cypress Glen staff members experienced no injuries resulting in lost workdays. This accomplishment qualified the community to receive the Gold Award from the North Carolina Department of Labor, which will be presented at their annual safety banquet in 2022.

Executive Director Laurie Stallings serves on the Community Advisory Group for the Master of Public Health program at ECU's Brody School of Medicine and the Health Services Management Advisory Board. Additionally, Laurie is a member of the Board of Directors for Community Crossroads, an organization serving the homeless population and those at risk for homelessness by providing safe housing and assisting them in developing a long-term plan that leads to self-sufficiency. She is also active in the leadership of John Paul II Catholic High School and St. Peter Catholic Church. Katie Paul, the Director



of Social Work, completed course work and earned a master's degree in social work in May 2021. In September, she was issued her provisional licensure as a LCSW-A. As a result, the Director of Social Work has extended one-on-one therapy services to the Cypress Glen residents in all levels of care. Currently, she is working toward Dementia Care Practitioner certification. 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.

This year, nine staff members received a total of \$4,300 in scholarships through various Cypress Glen scholarship opportunities.

## GREENVILLE'S CHOICE FOR SENIOR LIVING

Cypress Glen was recognized as the sole LCS community to win first place in the fourth annual Life Care Services BEST Competition, receiving a perfect score or 100% of available points. There were 71 LCS communities competing for the award, and this marks the second year in a row Cypress Glen earned first place honors. The BEST (Bringing Excellence Scorecard Total) award is based on ten key performance indicators, including Resident Satisfaction, Employee Safety, Occupancy, Operating Income, Employee Engagement, Five Star Rating, Cash Growth, Employee Turnover, Care Purchasing Services at Target, and Days in Accounts Receivable. Life Care Services initiated the award in 2017 to recognize communities that are delivering exceptional performance in areas the company considers important in becoming a best-in-class operator. To earn 100% and win the 2021 award was especially rewarding given the multitude of challenges created by the COVID-19 pandemic.

"Heartfelt Connections" is an LCS Memory Care Program designed to ensure that those persons who suffer from Alzheimer's disease and related dementias will be provided the promise of a kinder and gentler path through the turbulent journey of their disease. In 2021, Cypress Glen reached GOLD status in meeting the requirements to deliver this quality service to their residents. The "Heartfelt Connections" committee collaborated to complete training plans, brainstorm ideas to implement the various components of the program, and extensive training was provided to the Memory Care staff.

The expansion project of eighteen cottages and garden villas wrapped up in March 2021, with residents moving

into the last cottage of the new neighborhood. The first cottage to be completed was occupied in September 2019. The new residents are active, giving members of Cypress Glen, serving on committees, volunteering in the gift shop, and sharing their talents and treasures with the community.

Since 2019, LCS Development has been working with Cypress Glen administration to create a master plan for long-term growth of the community. While the pandemic slowed the project for a time, a market assessment was conducted in 2021 to analyze the demographics and competition in the Greenville market. The findings were favorable for an Independent Living expansion and the development team is working on details of the new apartment building to provide 57 large apartments. In addition, the master plan includes major renovations of the Cypress Glen health care areas, administrative office spaces, additional resident activity spaces, an earth berm, and reconfiguring the current auditorium space. Work on the construction timeline and further details continue.

Attane Marketing, formerly GlynnDevins, completed work on new websites for the UMRH communities. Websites were redesigned to simplify user experience and accommodate evolving technology. Cypress Glen's website continues to be a very useful resource for prospective families and referral sources. Cypress Glen Instagram and Facebook social media sites have continued to grow followers and have provided an efficient method to share good and useful news and information to a far-reaching audience.

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



*Cypress Glen resident Alice Bost takes full advantage of the outdoors on the covered back porch of her beautiful villa.*



# WESLEY PINES

LUMBERTON, NC | WADE ROZIER, EXECUTIVE DIRECTOR



## COMMUNITY BENEFIT: \$10,425

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

## BENEVOLENCE PROVIDED: \$1,389,316

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



**WESLEY PINES** understands the value in giving back to the local area and knows the importance of creating goodwill and networking within the community. Ways include participating as Ambassadors for the Lumberton Chamber of Commerce, in the Alzheimer's Association's The Longest Day, and the Alzheimer's Impact Movement Advocacy Group. Wesley Pines has been a long-time sponsor for the Lumberton Area Chamber of Commerce Annual Golf Tournament and the Christmas Parade, as well as volunteering at both events. Wesley Pines offered meeting spaces for two local Girl Scout Troops and Second Time Around band practice.

The community offers space for future healthcare workers from the University of North Carolina at Pembroke and Robeson Community College. Both entities have used the Wesley Pines Health Center as clinical sites for nursing students.

In the summer of 2021, Wesley Pines participated in a Job Fair hosted by the Career Center and Office of Community Engagement at the University of North Carolina at Pembroke. Through the job fair both students and alumni were reached to share part-time and full-time job opportunities. Over six hundred students participated in the event.

In 2021, Wesley Pines provided benevolent care to fourteen residents that totaled \$131,578. The Health Center provided 11,143 days of nursing care to Medicaid recipients and 729 days of care were provided to Assisted Living residents. Altogether, the Medicaid discounts totaled \$503,620.

## HEALTHCARE

Over the course of the past year, the health center experienced attrition in leadership with the retirement of Kathy Freeman. Kathy served as the Director of Nursing for 40 years and saw the community grow and prosper under her tutelage. Since retiring, she has reported to us that she is enjoying her time at the beach and with family.

Another change came at the announcement of Wade Rozier's departure. Wade served as the Executive Director of Wesley Pines for 17 years. During his time, the new health center was built along with growth in independent living with the expansion of deluxe villas.

During Kathy and Wade's tenure, the community received many years of deficiency-free surveys, LCS Harrison Awards, and even the LCS President's Award. Both these Wesley Pines legends will be sorely missed.

*Pictured above: (left to right): Coach and Mrs. Finley enjoying a game of Jenga with neighbor Mrs. Elizabeth Odom; Mrs. Carolyn Britt and Mrs. Sarah Britt taking an early morning stroll.*

RN Karen Cribb was hired as Wesley Pines new Director of Nursing in the summer of 2021. Karen is no stranger to the community as she first began as a new graduate nurse in 1997 prior to going on to Southeastern Regional Medical Center as Supervisor in the Outpatient Surgical Center, seeing the creation of the new facility and upstart. Karen has worked as a traveling RN, a charge nurse, and comes with a wealth of experience that she quickly put into practice. Croasdaile Village Associate Executive Director Rebecca Marion Grady and UMRH Corporate Executive Director Jonathan Erickson, filled in short-term interim Executive Director roles until Howard DeWitt, former retired Executive Director for Croasdaile Village took the helm.

During the pandemic, health surveys and inspections did not take place as a precaution to prevent the spread of the COVID-19 virus. The last full state survey conducted was in September 2019, and since then, the state has only sent surveyors to assess how infection control measures were being conducted and investigated any submitted complaints. Wesley Pines did undergo an infection control survey in September 2021 and was found to be in compliance.

Like most healthcare entities, the full impact of the COVID-19 virus was felt throughout the year. Through LCS, the community offered webinars for prospects and their families to share how to prevent contracting the virus, benefits of the vaccine, as well as other efforts that the organization put in place through EverSafe360. Wesley Pines also partnered with Wanda Faircloth, FNP, who hosted a Facebook Live sharing valuable information on the COVID-19 vaccine of which she was part of the trials. This video had over 4,400 views and was shared by 47 Facebook users.

For nearly a year, we were mandated to keep visitors out of Wesley Pines which meant that we had to coordinate video calls, window visits, and eventually, outdoor visits. In early Spring 2021, we gladly welcomed visitors back inside the community. The warm reunions between residents and their loved ones were wonderful to witness.

## WELLNESS AND COMMUNITY LIFE

Wesley Pines Community Life Department engages community residents through various methods to instill a healthy, holistic mindset. Community Life plans activities that promote emotional, environmental, health services, intellectual, physical, social, spiritual, and vocational



*Cape Fear Farm donates fresh vegetables to Wesley Pines residents.*

aspects of resident life. Brain games, community volunteer opportunities, fitness classes, resident-led prayer groups, community gardening, art class, creative writing class, lectures, speakers focused on health topics, religious lectures, and COVID-19 awareness tips are examples that wellness is a way of life within the community.

Community Life Services planned Meet and Greet events to ensure that new residents to Wesley Pines were introduced to their peers and key staff members. In further efforts to welcome new residents and help them adjust to their new home, the Community Life Service Department assembled bags with a note pad, pen, Kleenex, lotion, candy, and an information packet from each department listing contact information.

Independent Living residents joined Assisted Living residents one evening each month to play cards and board games. This activity was thought of by Independent Living residents who wanted to engage with Assisted Living. Through this endeavor, many new relationships developed between the two groups.

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 hosted Bingo games, played trivia games with residents, and assisted with addressing Christmas cards for residents.

The Wesley Pines Book Club met monthly led by the Community Life Services Director who reviewed and discussed the books participants are enjoying. During

the past year, the Marketing Director guided the group through Dr. David Jeremiah's book "Shelter in Place" on Zoom.

On May 6, Chaplain Gary Deese led residents from all levels of care and staff in a National Day celebration. The theme for the worship event was "Lord Pour Out Your Love, Life, and Liberty on Our Land." Chaplain Deese, residents and the Wesley Pines leadership team shared prayers focused on family, church, workplace, education, military, government, art, media, and entertainment.

Community Life Service Director Pamela Renfrow and the Marketing Director Amy Shooter held a "Tea Party" for Independent Living and Assisted Living residents. Tables were decorated with lace tablecloths from long ago, teacups in different patterns, and various floral arrangements for each table. Residents had their choice of an assortment of tea flavors and a large assortment of tea cookies and treats as they listened to violin music and chatted about tea parties from years past.

During the summer months, residents enjoyed a trip to Southport and Oak Island where they dined at Fishy Fishy Café on the waterfront followed by shopping at local consignment shops where they discovered their own treasures to take home. The group enjoyed a drive to Oak Island to view the lighthouse while also searching for ocean-view homes they had visited as children. The next trip was to Calabash and Seaside near Ocean Isle Beach. The group enjoyed a traditional Calabash-style seafood lunch at Ella's followed by shopping and ice cream.

The community is a sponsor of the Carolina Civic Center Historic Theater and Givens Performing Arts Center. Residents enjoyed attending the Carolina Civic Center Historic Theater's season opening show and the snippets of upcoming season's shows while also winning a number of door prizes. Wesley Pines supports the Robeson County Arts through promotion of events, sponsorships, and by attending events.

## AWARDS AND 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. The community is also proud to boast that Life Care Services was ranked first by J.D Power in Customer Satisfaction among Independent Senior Living Communities. This is the third win in a row.

In the latter part of 2020, LCS began a Life Plan Power Rankings program to recognize the outreach efforts of marketing departments in the categories of visits, personal connections, video messages, and deposits completed. Over the course of the period, Wesley Pines Marketing Director Amy Shooter was recognized for the following: for Life Plan Power Rankings in December 2020, she was #2 for visits (42 visits); February 2021 was #3 for Video Messages (64); March 2021 was #6 for Video Messages (53) and #5 for number of Reviews (10); April 2021 was #5 for Video Messages (60); and June 2021 was #10 for Personal Connections (14). LCS awarded Amy's third place win for March 2021 with a Ghirardelli gift basket.

## EVENTS

Due to an abundance of precaution, Wesley Pines was unable to hold traditional large gatherings and events. The Marketing Department worked in collaboration with the Therapy Department to hold a series of Facebook Live videos regarding fitness and wellness. These videos led up to two events for Senior Fitness Testing and a Fitness Class that were postponed.

In place of our traditional events, the Wesley Pines Marketing Director has remained connected with our residents and future residents with planned mail outs, care packages, home drops, virtual visits, personal connections, and emails.

## ALZHEIMER'S ASSOCIATION

Wesley Pines continues to lead the county in supporting the Alzheimer's Association. Despite restructuring and the Association's decision to end the Robeson County Walk, Wesley Pines continued to help fight against the disease by hosting the Longest Day Drive-Thru Fundraiser and Education Pick-up on June 18. The event raised over \$300.

Despite the virus, the mission of the Alzheimer's Association continued by disseminating online resources, virtual training opportunities, and other ways to advocate from a distance. Amy Shooter along with other advocates in the Southeastern North Carolina region, held a Zoom meeting with Mark Rusthoven of Rep. Dan Bishop's office to convey the need for caregiver education and to support bills funding Alzheimer's research.

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*Article written by Wesley Pines Interim Executive Director Howard DeWitt.*





# 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](http://www.croasdailevillage.org)

### Cypress Glen

**Elizabeth Jenkins, Marketing Director**

100 Hickory St. • Greenville, NC 27858  
(252) 530-7066 • ejenkins@umrh.org  
[www.cypressglen.org](http://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](http://www.wesleypines.org)

### Wesley Ridge

**Jacob Maring, Manager**

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





# THE IMPACT OF GIVING

OCT. 1, 2020–SEPT. 30, 2021

## FAITHFULNESS IN GENEROSITY

Being faithful... we hear folks use the phrase a lot, but what does it mean to you? For me, it has a special impact because my name, Caleb, in Hebrew means *faithful like a dog*. If you have ever had a dog, you know he/she will give unconditional devotion and is a friend by your side at all times. Faithfulness often means putting others first and staying true to family, friends, and others.

At The United Methodist Retirement Homes and the UMRH Foundation, we have been very fortunate to have supporters throughout the years who, even through the tough times, continue to faithfully support our mission with their time, talent, and treasure. A belief and trust in our mission has given us so many great donors. Faithful stewardship of the resources given builds confidence in our organization.



*Croasdaile Village resident Lucia Powe with Caleb Baker.*

In fiscal year 2021, donors gave to the UMRH Foundation and UMRH gifts totaling \$570,355. Two benevolent donors made significant contributions to create Fred's Oasis, a social gathering spot



**Caleb W. Baker**  
*UMRH Director of Development & Church Relations*

at Cypress Glen. Other donors supported causes to reinforce existing programs or to name specific areas at both Cypress Glen and Croasdaile Village. The North Carolina Conference of the United Methodist Church contributed \$36,899 to the Foundation along with \$24,601 coming from Methodist Churches in our conference from their Mother's Day Offerings. While our grand total was down from last year, our Mother's Day Offering was up along with conference giving. Faithful donors continue

to lead the charge and build excitement around philanthropy in our communities.

## CYPRESS GLEN DONATION

An anonymous donor provided Cypress Glen with the means to fund clinic medical care for independent residents. This generous gift is the largest donation ever to a UMRH community. A resident committee was formed to assist the Executive Director to determine the clinic services needed.

## SCHOLARSHIPS

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

## UMRH DONATIONS

The United Methodist Retirement Homes Foundation endeavors to enhance the quality of life of current and

## EXAMPLES OF FAITH

**RUTH** said, “Do not urge me to leave you or to return from following you. For where you go, I will go, and where you lodge, I will lodge. Your people shall be my people, and your God my God.” Ruth 1:16

After her husband died, Ruth could have chosen to go off on her own and create a new life for herself. But instead, she chose to remain with her mother-in-law Naomi and follow her to her home country. Ruth remained faithful to the family God had given her. And because of her faithfulness, God took care of the rest.



And **JONATHAN** said, “Do not fear, for the hand of Saul my father shall not find you. You shall be king over Israel, and I shall be next to you. Saul my father also knows this. And the two of them made a covenant before the Lord.” 1 Samuel 23:16-18

The story of Jonathan and David is a reminder of what it means to be faithful friends. Jonathan could have been jealous of David, who was chosen by God to proceed his father as king, but he vowed to remain by David's side and promised to support him.



The **SERVANT**: His master said to him, “Well done, good and faithful servant. You have been faithful over a little; I will set you over much. Enter into the joy of your master.” Matthew 25:21

Sometimes, faithfulness means abandoning fear and going after it. We shouldn't allow fear or laziness to hold us back from giving ourselves faithfully to everything we do.

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.

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.



*Wallace Family Team and Hole Sponsor: Kimble Wallace, Debra Wallace, Duane Wallace, Lee Wallace  
Family of Rev. Robert Wallace, Croasdaile Village Resident*

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 UMRH. Starting on page 19, please enjoy our honor roll of faithful donors.

## GOLF

In 2021, we held our 22nd Annual UMRH Golf Tournament and broke the record once again for funds raised at \$21,650 to support Benevolent Care. The tournament was at Hillandale Golf Course and started with an early morning greeting, coffee and doughnuts, and some golf motivation. Thank you to all who played, sponsored, or helped out at this fun-filled event. Please, be in touch if you or your company would like to sponsor a hole for our 2022 UMRH Golf Tournament.

## GIVING TODAY

Did you know you can use a variety of assets to make a gift to the UMRH Foundation? We accept all type of gifts, such as bequests, stock, gift annuities, life insurance, and more.

## GIVING TOMORROW

At some point in life, we ask: What will be my lasting legacy? How will others remember me? We all hope we will be remembered for our love, generosity, and our very best qualities. Your greatest legacy will be the memories others have of you. Your legacy can also be felt by people you will never meet. When you make a planned gift to the UMRH Foundation, your love, generosity and values will extend into the future. Here are three easy ways to give to UMRH in the future:

- 1. Giving Through Your IRA:** One of the simplest ways to continue to support the mission of UMRH into the future is to change the beneficiary of your IRA or retirement plan to the UMRH Foundation. No lawyers are needed, just a change form from your IRA or retirement plan administrator.
- 2. Life Insurance Beneficiary:** Similarly, you can designate UMRH as beneficiary for a percentage of your life insurance policy's benefit by simply contacting the life insurance company or agent.
- 3. Giving Through Your Will:** If you already have a will or living trust, or intend to complete one, you can easily name the UMRH Foundation as a beneficiary. This is called a bequest. One letter to your estate planning attorney can update your will or living trust. Here is a sample of bequest language:

*I hereby, give, devise and bequeath \$ amount or percentage to UMRH Foundation, a non-profit organization located at 2600 Croasdaile Farm Parkway, Suite A-500, Durham, NC 27705 Federal Tax ID #56-1870172, for UMRH Foundation's general use and purpose.*

We would be honored to be part of your legacy. Whether beginning or updating your legacy giving plans, our

**“By faithfulness we are collected and wound up into unity within ourselves, whereas we had been scattered abroad in multiplicity.”**  
*Saint Augustine*

Planned Giving site, [umrhgift.org](http://umrhgift.org), has resources to meet you where you are. Please let us know how we can help provide you and your financial/estate planning advisor with more information. Contact us to discuss ways to make a meaningful impact by giving to the UMRH Foundation.

## OUR VISION

The United Methodist Retirement Homes, Inc., will be the provider of choice for retirement living and continuing care services in North Carolina.

## OUR VALUES

- Human Dignity:** We will provide services to a diverse population in a welcoming environment that exudes compassion, respect, and dignity for all.
- Ethical Practices:** To achieve our mission and vision, we will engage in practices that are of the highest ethical standards guided by Christian principles in our decision making.
- Financial Integrity:** We will manage our financial resources in a manner that enhances our services, continues growth, and maintains appropriate reserves. Our goals are twofold: to enhance the lives of those we serve and ensure the long-term viability of The United Methodist Retirement Homes, Inc.
- Benevolent Care:** We will provide benevolent care to community residents as needed and resources allow.
- Workforce Excellence:** We will recruit, develop, and support competent and caring individuals who are committed to our mission.
- Quality Assurance & Performance Improvement:** We will offer programs and services that are based on the best practices to foster positive wellness, happiness, security, and health.

**“And without faith it is impossible to please God, because anyone who comes to him must believe that he exists and that he rewards those who earnestly seek him.”**  
*Hebrews 11:6*

- **Governance**

**Accountability:** We will govern the organization in a diligent and ethical manner. We will be accountable for our performance to those we serve and to the public through detailed disclosure statements.

- **Community**

**Involvement &**

**Collaboration:** We will engage with other related organizations to deliver services to seniors within our communities and surrounding areas.

- **Education:** We will cooperate, as our resources allow, with educational activities that further the careers of students in senior wellness, health care, and related fields.

**“We all should give what we have decided in our hearts to give, not reluctantly or under compulsion, for God loves a cheerful giver.”**

*2 Corinthians 9:7*

The Foundation and its volunteer board of directors and UMRH staff members always consider the interests of donors as the first priority in planning gifts. Information obtained 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 and staff to give legal, accounting, tax, or other advice, which is the responsibility of the donor’s counsel.

## ABOUT THE FOUNDATION

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

The purpose of the Foundation is to enhance resident life at Croasdaile Village, Cypress Glen, and Wesley Pines by funding projects from annual gifts, planned gifts, and endowments; to support benevolent care for those residents who can no longer fully pay for their care; and to support special programs at the above-named communities.

The Foundation is also the umbrella for capital campaigns, minicampaigns, and special appeals. The Foundation is governed by a volunteer board of directors.

**“Success in God’s eyes is faithfulness to His calling.”**

*Reverend Billy Graham*



*The United Methodist Retirement Homes Foundation, Inc., raises funds for Benevolent Care each December for the UMRHF Auxiliary Fund through the Tree of Love at each community. Ornaments for the tree are five dollars each and are placed on the trees in memory or*

*honor of a loved one.*

*Each community has their own design. We thank you for your generosity that assists those residents in our communities who have special financial and personal needs.*



# DONOR THANKS

October 1, 2020 thru September 30, 2021

*Your generous donations have been a great support to The UMRH, Inc., communities for 2020-2021.*

## INDIVIDUAL DONORS FOR FISCAL YEAR 2021

Mr. & Mrs. Julius D. Adams

Mr. & Mrs. Robert Aitchison

Aldersgate Court/Barratt's Chapel  
Neighbors

Mr. S. Rudolph Alexander

Ms. Gail K. Allen

Mrs. Donna M. Amaya

Ms. Nancy Y. Anderson

Mr. Jack Arledge

Ms. Carol Ashley

Mr. & Mrs. Charles Atkinson

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Mr. & Mrs. Arthur Axberg, Jr.

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