



Annual Report



2024

THE UNITED
METHODIST
RETIREMENT
HOMES, INC.
UMRH.ORG



Our 2024 Front Cover Features:

Top Image: Croasdaile Village Transportation Supervisor, Latrina Eubanks, is a resident favorite as acknowledged by resident Norma Davis. **Second Image:** Strolling through life with a friend by your side. Croasdaile Village Residents Janet Kistler and Dottie Osborn enjoy their time together. **Third Image:** Croasdaile Village Residents Bob Wienberry and Shirley Fredrick participate in the annual Turkey Trot around Boles Lake. **Bottom Image:** Croasdaile Village residents enjoy the popular chair exercise class.

The Mission

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



Executive Directors

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

Editors & Contributors

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

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It is our pleasure to introduce to you the 2024 Annual Report.

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

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

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

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

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

W. Lee Harriss

UMRH Board of Trustees Chairman

Jonathan Erickson

UMRH Corporate Executive Director

UMRH and Foundation Board of Trustees & Directors

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



UMRH and Community Leadership

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

Year-End Financials



Stacy Dobson
UMRH Chief Financial Officer

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

Ms. Amanda Ziegler of FORVIS/ Mazars, presented the audit report for UMRH for the fiscal year, ending September 30, 2024, to the UMRH Board of Trustees. She reported a clean audit with no adjusting entries and no material weaknesses. A copy of the completed audit is on file and available for viewing upon request.

Sources of Cash

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

Uses of Cash

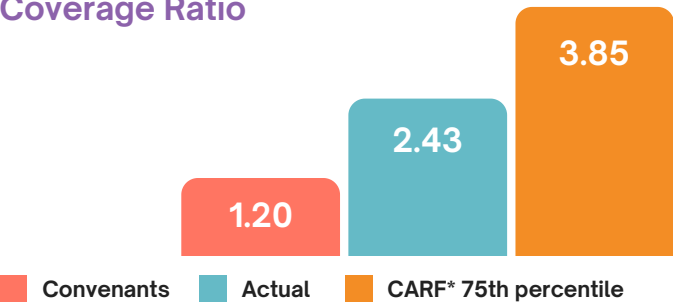
Debt Service, Community Enhancements, Increasing Reserves, Benevolences, Capital Improvements.

Covenants

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

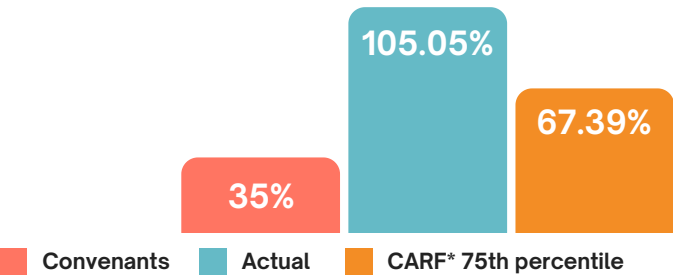
2024 Financial Achievements

UMRH, Inc. Debt Service Coverage Ratio



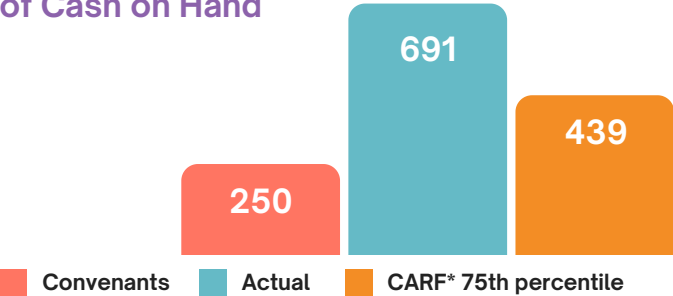
This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into long-term solvency. This ratio reflects the organization’s ability to fund annual debt service with cash reserves and net entrance fees.

UMRH, Inc. Cash to Debt Ratio



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

UMRH, Inc. Days of Cash on Hand



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

* Commission on Accreditation of Rehabilitation Facilities

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

Consolidated Balance Sheet September 30, 2024

ASSETS

Current Assets

Cash and cash equivalents	\$ 4,952,922
Investments	120,954,343
Assets limited as to use, current portion	6,367,042
Accounts receivable, net	4,185,514
Other receivables	1,901,669
Inventories	195,250
Prepaid expenses and other current assets	1,560,515
Total Current Assets	\$ 140,117,255

Non-Current Assets

Assets limited as to use, net of current portion	\$ 90,236,233
Investments - restricted	11,306,371
Property and equipment, net	229,861,132
Trusts receivable	140,672
Deferred marketing costs, net	180,545
Interest rate swap agreements	6,951,885
Total Non-Current Assets	338,676,838
Total Assets	\$ 478,794,093

LIABILITIES AND NET ASSETS

Current Liabilities

Annuity payable, current portion	\$ 64,724
Bonds payable, current portion	5,565,000
Accounts payable	7,621,769
Accrued salaries and related expenses	2,653,289
Accrued interest payable	3,638,821
Total Current Liabilities	\$ 19,543,603

Long-Term Liabilities

Annuity payable, net of current portion	\$ 393,497
Bonds payable, net of current portion	215,950,738
Liability for refundable advance fees	14,473,247
Deferred revenue from non-refundable advance fees	96,694,741
Deferred revenue - other	-
Due to related parties	4,305
Funds held for others	92,581
Total Long-Term Liabilities	327,609,109
Total Liabilities	\$ 347,152,712

Net Assets

Without donor restrictions	\$ 114,782,746
With donor restrictions	16,858,635
Total Net Assets	131,641,381
Total Liabilities and Net Assets	\$ 478,794,093

Consolidated Statement of Operations and Changes in Net Assets. For the Year Ended September 30, 2024

REVENUES, GAINS, & OTHER SUPPORT WITHOUT DONOR RESTRICTIONS

Net resident and patient service revenue	\$ 82,519,871
Amortization of advance fees	11,421,393
Net assets released from restrictions	725,843
Other	93,773
Interest and dividend income	5,019,205
Total Revenues, Gains and Other Support	\$ 99,780,085

EXPENSES

Nursing services	\$ 24,376,694
Dietary and food services	14,665,288
Administration	14,025,324
Plant operations, maintenance and security	8,692,898
Laundry and housekeeping	4,931,171
Resident services - activities	3,074,400
Home care	3,076,845
Interest	5,192,393
Depreciation and amortization	15,730,143
Loss on disposal of property and equipment	2,019,800
Total Expenses	95,784,956
Operating Income	\$ 3,995,129

NON-OPERATING GAINS (LOSSES)

Net investment gains, realized	\$ 1,205
Net investment gains, unrealized	15,964,162
Contributions	204,834
Construction related marketing costs	(390,113)
Change in fair value of interest rate swap agreement	(4,613,676)
Other	35,852
Net Non-Operating Gains	11,202,264
Excess of Revenues, Gains and Other Support Over Expenses	15,197,393
Net assets released from restrictions for purchase of property and equipment	76,938
Change in Net Assets Without Donor Restrictions	\$ 15,274,331

CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS

Contributions	\$ 968,030
Interest and dividend income	317,026
Net investment gains, realized	53,157
Net investment gains, unrealized	2,412,242
Change in split interest agreements	228,384
Maturity of split interest agreement	3,316
Change in value of pledges	(28,846)
Bad debt expense	3,000
Net assets released from restrictions	(802,781)
Change in Net Assets With Donor Restrictions	3,153,528
Change in Net Assets	18,427,859
Net Assets, Beginning of Year	113,213,522
Net Assets, End of Year	\$ 131,641,381

Croasdaile Village

DURHAM, NC
Heather March, Executive Director

Celebrating 25 Years of Community and Care: A Milestone Anniversary for Croasdaile Village

Croasdaile Village is proud to mark a significant milestone - its 25th anniversary. For a quarter of a century, our community has been a beacon of support, companionship, and care for its residents, embodying the true essence of a home away from home.

Established in 1999 with a vision to create a nurturing environment where seniors could enjoy their golden years to the fullest, Croasdaile Village has flourished over the years, becoming a beloved fixture in the lives of its residents and their families. Croasdaile Village has transformed into a vibrant community that cherishes its values of respect, dignity, and compassion.

At the heart of Croasdaile Village are the residents, whose stories, experiences, and wisdom form the rich tapestry of this special community. From shared meals in the dining venues to lively social gatherings, from educational seminars to fitness classes, every moment spent within the community is a testament to the bonds that have been forged over the years.



Photo top: Croasdaile Village Team members Craig Lloyd, Wanda Manzueta, Heather March and Rev. Laurie Hays-Coffman dressed up for the Roaring 20's event. **Photo bottom left:** Croasdaile Village Resident Kathy Yang ready for the 25th anniversary celebration festivities. **Photo bottom right:** Croasdaile Village celebrated their 25th anniversary with a gala event, including ice sculptures.

Community Benefit: \$23,100

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

Benevolence Provided: \$3,937,825

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



The dedicated employees at Croasdaile Village also deserve special recognition for their unwavering commitment to providing top-notch care and support to the residents. Their kindness, professionalism, and dedication have created a warm and welcoming environment where residents can thrive and truly feel at home.

As we celebrated our 25th anniversary of Croasdaile Village in June, we reflected on the countless memories made, friendships formed, and lives enriched within our walls. We had a week full of events for residents and employees that ended with fireworks that were paid for by sponsors. Not only did our community get to enjoy the fireworks, we had Durham residents from all over reach out to thank us because their families were able to enjoy the display as well. Our dining services department did an amazing job preparing different types of food each day to celebrate whatever our theme was for the day.



Looking ahead, the future is bright for our community, as we continue to grow and adapt to meet the changing needs of our residents while remaining true to our core values. With innovation, compassion, and a deep sense of community spirit, Croasdaile Village is poised to continue making a positive impact for years to come.

So, here's to 25 years of laughter, love, and lifelong connections at Croasdaile Village. I am proud to say that I have been here since the beginning and the residents and employees are truly family. May the next 25 years be filled with even more happiness, health, and harmony for all who call this place home.

— Heather March Executive Director

Croasdaile Village Wellness 2024

Croasdaile Village Wellness continues to provide a variety of classes, interventions, presentations, and special events that highlight each dimension of wellness while considering the interests and goals of Croasdaile Village residents. The highlights of the year include a spring Wellness Fair, Fall Prevention Week, and the Rock 'n' Roll Triathlon.

The Wellness Fair theme was “The Longevity Lifestyle” which drew on the wisdom of the Blue Zones and the functional considerations to improve health and fitness in older adults. The topics included the Longevity Lifestyle with Margie Pacher, M.Ed., Nutrition with Kelsey Cherry, R.D., Balance and Fall Prevention with the HealthPro Heritage Therapy Team, Building Strength as You Age with Catherine Doyen, CPT, and Spiritual Wellbeing with Rev. Laurie Hays-Coffman. Residents were provided with information booths facilitated by the Clinic, Home Care, Navigation, Nutrition, and Wellness, and lawn games to enjoy social time with other residents.

Photo top left: Croasdaile Village members, Shannon Mussatti and Leah Heldreth, enjoy the 25th Anniversary celebration with Resident Nan Lee. Photo bottom left: The popular band, Leon Jordan's Continentals, provided entertainment for the 25th Anniversary Gala.

Fall Prevention Week included a fall risk assessment with HealthPro Heritage Therapy Team, Balance Bootcamp with Catherine Doyen, CPT, Balance Essentials Presentation with Margie Pacher, M.Ed., Balance Progressions presentation with Catherine Doyen, Reduce Your Falls Risk with Clinical Strategies with Susan Mullis, R.N., and beginner to advanced exercise classes. Residents who participated received a “Fall Prevention is in the Air” long-sleeve t-shirt. Approximately 100 residents participated with 75 participating in the falls risk assessment.

The Rock ‘n’ Roll Triathlon was a hit with our more active residents. Events included pool walking or swimming, recumbent biking, and walking or jogging Boles Lake. Participants were split between beginner and advanced groups. Each event space had sixties rock ‘n’ roll music and water stations for residents to hydrate upon transitioning to the next event. Winners received gold, silver, or bronze medals. Fourteen residents completed the triathlon, and several came out to cheer on their favorite triathletes.



Photo top right: Croasdaile Village team express their gratitude for the CV Resident’s Associations gifts from the Employee Appreciation Gift Fund. **Second top right photo:** Residents enjoy unique celebrations, including making their own Tie-Die shirts for National Tie-Die Day. **First bottom left photo:** Croasdaile Village Resident, Gloria Glenn and Staff Member, Lindsey Dean, share a smile in the Village Commons. **Second bottom left photo:** Croasdaile Village Resident, Barbara Grambow, enjoyed making fun and tasty Gingerbread men during the holidays.

Our resident Wellness Committee was a crucial part in making our events successful, from encouraging resident participation to volunteering for a variety of event tasks.

At Croasdaile Village, we remain dedicated to fostering a welcoming community for both living and working. As part of this commitment, we have expanded our career growth and development efforts.

This year, we proudly sponsored five employees to complete the Certified Nursing Assistant (CNA) program and state certification exam. We are delighted to announce that all five successfully passed both the course and the exam. Additionally, one team member achieved the significant milestone of completing the requirements to become a Registered Nurse (RN).

Our healthcare Life Enrichment team had a fantastic year, working to engage our residents in activities that focus on the 8 dimensions of wellness. Residents enjoyed a wide range of outings and events both within the Pavilion and in the community.

Cypress Glen

GREENVILLE, NC
Laurie Stallings, Executive Director

Spiritual Life

In September 2024, Cypress Glen’s Spiritual Life committee donations totaling \$26,400 were distributed to 18 charitable organizations within the Greenville-Pitt County area. Greenville Wesley, an ECU and PCC campus ministry, was a new recipient this year after an impactful presentation given by their campus minister, bringing awareness to the many ways the organization serves students. The total giving for the fiscal year was \$50,400.

Currently, there are 6-8 resident volunteers who regularly volunteer at the local Joy Soup Kitchen, assisting to address food insecurities throughout Greenville.

Cypress Glen coordinates with Pitt Community College (PCC) and East Carolina University (ECU) to contract for a current performing arts/music department student to fulfill the community’s need for a Sunday worship service choir director. This is mutually beneficial to the student, who is compensated for these services, and to Cypress Glen.



Staff Growth & Honors

Social Services Director Katie Paul completed 3,000 clinical hours and passed her state licensing exam in July of 2024. She is now a North Carolina board-certified Licensed Clinical Social Worker. Katie has more than 20 years of service at Cypress Glen and combined with her passion for the mental health treatment of older adults, this will add another layer of expertise to the services she provides for Cypress Glen residents. One-on-one psychotherapy with Katie is available as part of the resident monthly service fee, to keep services in house when preferred.

Photo top right: Cypress Glen residents enjoyed an overnight trip to the Outer Banks, including an outdoor drama performance at The Lost Colony in Manteo. *Photo bottom left:* Cypress Glen Resident, Jerry Hopfendgardner & Executive Director, Laurie Stallings.



Community Benefit: \$878,773

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

Benevolence Provided: \$777,487

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

As has been our history, Cypress Glen partnered with six local schools to serve as a clinical site for their CNA programs and provided 8,142 total clinical hours for the students. It has been commonplace for these students to later apply for staff positions due to their positive experience.

Staff scholarships are awarded for spring and fall semesters each year. In 2024, the following staff members earned scholarships:

Table Scholar Award: **Abby Paul**, a waitstaff member, is attending ECU to pursue a degree in recreation therapy. She has worked at Cypress Glen since 2020. A second Table Scholar recipient is waitstaff member **Madison Bowen** who is also attending ECU to pursue a degree in recreation therapy. She has been employed at Cypress Glen since 2021.

The Margaret Mansfield Scholarship: **Jylnn Burney**, a Medication Technician and C.N.A. is attending Lenoir Community College to become a licensed nurse. Jylnn has worked at Cypress Glen since 2021.

The Vera and Chip Pennington Scholarship: **Cedrick Lee**, C.N.A., is attending Pitt Community College to become a registered nurse. He completed his clinical work to become a C.N.A. at Cypress Glen and then joined the Cypress Glen team in early 2024. Also receiving the Pennington Scholarship is **Holly Rigsbee**, a waitstaff member, who joined the dining staff in early 2024. She plans to go to graduate school to become a physical therapist, with an interest in taking care of cancer patients.

The Staff-to-Staff Scholarship: Part-time front desk clerk **Laurie Maloney** is enrolled in the Northcentral University's Doctor of Philosophy in Psychology program. Laurie has worked in her role since early 2020. She is interested in the prevention of elder abuse and is currently drafting her dissertation on recognizing risk factors associated with the enablement of existing abuse.

Cypress Glen awarded scholarships to two certified nursing assistants which they are using to attend nursing school. The community strives to support the staff with their personal and professional growth.



Dining News

Dining services recently concluded a year of an extraordinarily successful Chef's Special program. The program was developed to generate excitement among our residents in the form of new and interesting menu items. The dining team utilized their collective creativity to craft high end, plated entrees in addition to the existing main course choices on our four-week menu cycle. The response was fantastic, and residents continue to appreciate the more adventurous offerings on the menu. Taco Tuesdays and burger Thursdays have also been a big hit, and the international items on the menu have broadened the residents' culinary horizons.

This year saw the return of the Rowdy Bunch, a festive monthly gathering of residents for food and fellowship. A Cypress Glen couple founded The Rowdy Bunch more than 25 years ago as a weekly gathering for attendees to meet and dine with other residents whom they may not have had the opportunity to meet. The popularity of this group quickly grew and was consistently well-attended until the gathering paused in 2020. Upon resurrection this year, it is again a tremendous success due to the impressive resident entertainment and top-notch meals from the dining team.

Another notable return to Cypress Glen has been the ECU Club dinners where residents gather for a fine dining style coursed meal, accompanied by musical entertainment and a presentation relevant to East Carolina University. Many residents have ties to ECU and appreciate an opportunity to don their purple and gold in support of their beloved school. Guest speakers from various university entities present interesting programs to further educate the audience on ECU's growth and accomplishments. Dining services create and present an incredible meal as an added attraction for these quarterly events.

Photo top right: Residents participated in Cypress Glen's Olympic Games Competition

Life Enriching Activities

The Life Enrichment Department has joined forces with Lifeloop, a comprehensive software platform designed to deliver quality experiences for residents. Two large screen mobile monitors were purchased to display the digital programs, delivering wellness-focused content to engage and entertain the residents in memory care and long-term care/short-term skilled nursing. The Lifeloop programming also offers valuable learning opportunities and challenging games for Independent Living residents.

Campus Enhancements

A renovation to the Independent Living D Wing patio was completed in 2024, increasing the size and giving it a fresh look. The patio includes new hardscaping, perimeter landscaping, integrated underlighting, new tables and chairs, and a gas grill for residents' use.

A new outdoor sporting area was designed and completed this year for residents to enjoy a little friendly competition or hone their skills. Residents can relax with horseshoes, cornhole with custom granite tops, a putting green, and a shuffleboard court.

The Barnes Private Dining Room is a popular gathering spot for meetings, card games, special celebrations, and for groups wanting an intimate dining experience. The space, which comfortably accommodates twenty-eight people, was given a makeover this year with a fresh look and contemporary furniture.

Several departments appreciate GEM electric vehicles to perform their duties. Marketing, security, and housekeeping utilize these attractive, efficient cars. These high quality, electric service vehicles add more versatile capabilities to our service fleet, as opposed to traditional golf carts. The appearance of these vehicles creates a positive first impression for visitors, while providing safe and comfortable transportation about the sprawling campus

Photo top right: Cypress Glen Residents Len & Sharon Hooper, Gene Foster, Lindy Daughtry, and Leonard Dorn enjoying refreshments and fellowship in the Cypress Glen café.



Marketing & Sales

The South Wing Independent Living apartment building expansion construction project added an exciting element to regular marketing efforts. The 57 apartments sold out in March and the buyers and current residents actively attended monthly Hard Hat presentations given by the contractor and development team. The project timeline remains on track for completion in December 2025. There are six different open-concept floor plans varying in size from 1,080 to 1,900 square feet. Each apartment will have a patio or balcony and underbuilding parking.

Marketing staff met with each of the buyers throughout the summer to make finish selections for their new apartment. A member of the Blum Construction team was on hand for technical construction questions. The process went smoothly and was completed in early September. The South Wing building will connect to the existing community using an interior hallway past a new auditorium and a new restaurant-style dining venue and wine bar, all currently under construction. There is great resident excitement surrounding the new facilities. Additional construction projects within the current main building begin in January 2025.

Second top right photo: Cypress Glen Residents took an overnight trip to the scenic Outer Banks for fun in the sun.

Wesley Pines

LUMBERTON, NC
Amy Shooter, Executive Director

Community Benefit

Wesley Pines strives to give back to the local area understanding the value of creating goodwill and networking within the community. Ways include participating as Ambassadors for the Lumberton Chamber of Commerce, a longtime sponsor for the Lumberton Area Chamber of Commerce Annual Golf Tournament and the Christmas Parade as well as volunteering at both events. Wesley Pines offers meeting spaces for two local Girl Scout Troops, Second Time Around band practice, and The Oaks Homeowner's 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. From January to April 2024, Physician Assistant students from Methodist University shadowed various healthcare team members to gain knowledge in long-term care.

Wesley Pines is a season sponsor for the Carolina History Civic Center in Lumberton, the Givens Arts Center at the University of North Carolina at Pembroke. Both venues offer musicals, local talent performances, concerts, and guest speaker series which residents enjoy attending. The community also sponsors local non-profits and community organizations such as Kiwanis and Beast Fest in the neighboring town of Bladenboro. As a token of appreciation, Wesley Pines provided Police Appreciation gifts to the officers of the Lumberton Police Department presented by Mrs. Kimberly Walters, Marketing Director.



For several years now, Wesley Pines has partnered with Hickory Grove Baptist Church of Bladenboro to be a host location for dropping off donations for Operation Christmas Child which is part of the Samaritan's Purse. Jessica Stanley, who serves as the Healthcare Admission Director has also volunteered to help pack shoeboxes at the Operation Christmas Child Packing Center in Charlotte, North Carolina.

The community partnered with Blood Connection to serve as a blood donation site. The blood drives occurred three times in the past year. At each drive the goal was met or exceeded for donations.

Photo top right: A team of Wesley Pines staff members are displaying their patriotism dressed in red, white and blue on Veteran's Day 2024.

Community Benefit: \$45,199

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

Benevolence Provided: \$1,129,941

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

Healthcare

Wesley Pines began a partnership with Eventus Whole Health in April 2022 which continues to grow and expand. Eventus provides both customized primary care and mental health services to residents and most recently began offering psychotherapy services. In the Spring of 2024, the community welcome the return of Dr. Rhonda Lowry as Medical Director. Mrs. Brandie Jacobs, FNP, continues to serve residents on site four days a week and Mrs. Nickey Dimery, FNP, provides mental health services one day per week. As this collaboration continues to grow, the benefit is the improvement in the lives of our residents through greater access to medical care.

Administration

Mrs. Karen Cribb, RN, Director of Nursing, has served on the Career Employment Council since 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 that each educational establishment could learn what the workforce is seeking. Wesley Pines in turn serves as clinical sites for these educational establishments.

During the past year, Ms. Amy Shooter and Mr. Charles Davis, Plant Operations Director participated in a tabletop Emergency Preparedness Trainings provided by Duke Emergency Preparedness Coalition. The tabletop exercise focused on how to respond to cold weather emergencies and determine when to shelter in place or evacuate residents and staff.

In January 2024, Mrs. Cynthia Woodell was chosen as the Environmental Services Supervisor. Cynthia was a Food and Beverage team member who had been with the community for several years. Since beginning the new role, Cynthia has focused on learning each role in her department so that she can successfully lead her team. She is a graduate of Robeson Community College and resides in Lumberton.



Wellness & Community Life

Our Community Life Services team has kept residents engaged with great activities and events that our residents enjoyed. Crafts have made a comeback with residents enjoying painting projects. Our residents have gone on many lunch and shopping trips to neighboring towns, mystery rides, and concerts at the Carolina Civic Center to hear groups such as The Drifters. During spring and summer months, the team had ice cream socials and a watermelon social. One of the new programs introduced was the Fit, Fab, & Fun exercise program that is resident led by two independent living residents and an assisted living resident. Other new volunteers include new singers and a new Bible Study leader.



Photo top right: The Five Wesley Pines Amigos celebrating at Let's Taco About Wesley Pines Achievements are clockwise from bottom right, Gary W. Turner (Plant), Jeff Ashley (Plant), Charles Davis (Plant Operations Director), Jimmie Johnson (Plant), and Ricky McKinnon (EVS). **Second top right photo:** Mrs. Jerlene Hunt is shown with the autumn door hanger she painted in craft class. **Photo bottom right:** Mr. and Mrs. Fred Vines dress as a chef and server for Halloween.



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

Other notable communitywide activities over the past year were Pink out For Breast Cancer, World Day of Prayer, the Kick It for Parkinson's Walk, and the Walk to End Alzheimer's. One of the most exciting weeks in the health center is National Nursing Home Week in which each department hosted an activity each day of the week that showcased each department's hidden creativity. The community also celebrated National Assisted Living Week with a carnival and Assisted Living Open House and International Active Aging Week with a guest speaker from the Robeson County Extension Agency.

Awards & Accolades

With the direction of Ms. Amy Shooter and Mr. Allen Lloyd, Human Resources Director, Wesley Pines' Extraordinary Impressions scorecard was submitted to LCS in April 2024, earning SILVER status. The Employee of the Month program began in June 2024 and to date, the following employees have been selected:

- **June 2024: Ricky McKinnon**, Environmental Services
- **July 2024: Margaret Ramirez**, Healthcare
- **August 2024: Mary McRae**, Healthcare
- **September 2024: Terry Allen**, Healthcare
- **October 2024: Kelley Campbell**, Healthcare
- **November 2024: Janet Sealey**, Food and Beverage Services
- **December 2024: Aprill Cox**, Healthcare

Mrs. Karen Cribb, Director of Nursing, received a coveted **Mary Harrison Award** from LCS. The award is only given to communities who have a deficiency-free survey, which was achieved during the Department of Health Services Regulation in September 2023.

The community reached a 5-Star Rating on Medicare compare during 2024. The rating consists of three areas which include Health Inspection, Staffing, and Quality Measures.

Wesley Pines awarded the **Louie and Maxine Locklear Amos Scholarship** to **Ms. Hannah Cummings** on September 30th. Hannah is a Certified Nursing Assistant who is in her first year in the Associate Degree Nursing Program at Southeastern Community College.

With focus and teamwork, both assisted living and skilled nursing reached 100% SOLD milestones in February 2024. This was no small feat, but with the Marketing duo of Kimberly Walters, Marketing Director and Jessica Stanley, Healthcare Admissions Director, we had a full house.

Photo top left: The Wesley Pines team PINKED OUT in honor of Breast Cancer Awareness. Photo bottom left: Mrs. Stephanie Ward, Director of Community Life Services and her mother, Ms. Wanda Bennett who resides in the Wesley Pines Health Center show their solidarity in the fight to END ALZHEIMERS.





Events & Community Impact

The largest community event of the year was Shaggin' Under the Pines. The event was held on May 17th with food provided by the Food and Beverage team, and music by The Holiday Band. Residents, family members, prospective residents, guests, and staff all had a great time eating and dancing the evening away.

One of the most exciting events is the Veteran's Day Celebration that was held on Sunday, November 10th outdoors on the campus near the front entrance to the main building. Rev. Gary Deese was the Master of Ceremony, music was provided by Berea Baptist Church of Pembroke, special music provided by Anna Grace Hunt, and guest speaker was Dr. Cherry Beasley. Mr. Larry Cummings, who is a resident of the community, sang the closing song. The highlight of the event was the live paratrooper jump in presenting the American flag by All-Veteran Group.

Photo top left: Christy Oxendine, Food and Beverage Supervisor (top left) and James Sandrock (top right) are shown with Food and Beverage team members during Food Service Week. **Second top left photo:** A patriotic group of residents and guests enjoying the Wesley Pines Veterans Day Celebration **Photo bottom right:** Mrs. Shirley Stockton, Wesley Pines Resident and Robeson Community College (RCC) Board of Trustee member provides Mrs. Karen Cribb, Director of Nursing with the RCC scholarship donation in honor of the Wesley Pines Nursing Department.

Community Initiatives

- With a renewed focus on expansion projects, Wesley Pines began working with LCS Development to expand the rehab wing, main dining, library, assisted living activity space and create a billiards room.
- The Executive Director and Plant Operations Director worked with RGS Builders and Scotland Granite to complete our beauty salon and healthcare nurses station projects. To further complete the project and increase security, Modern Edge Technologies installed new panic buttons at the skilled nursing desks on July 31st to aid in emergency response. The new cabinetry was very much needed for improved storage and function which has been a great improvement.
- Completed installation of the new marquee, exterior directional and wayfinding signage across campus.
- Refurbished several healthcare rooms with painting and ensuring high aesthetic standards.
- Reupholstered guest chairs in the healthcare resident rooms and the fellowship center.
- Replaced Arjo lifts and lift slings.
- Replaced HVAC unit for the main kitchen.
- Replaced healthcare kitchen stove.
- Completed a refurbishment and storage project for Environmental Services storage.



Wesley Ridge

LUMBERTON, NC
Robin Sagendorph, Manager



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



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.

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 to approximately \$30,840 for a single person and \$35,220 for a couple. Residents of Wesley Ridge have access to Wesley Pines Health Center should the need arise. The community is managed by Partnership Property Management (PPM), of Greensboro, N.C., and Florence, S.C. The community has an Advisory Board which meets twice annually. Robin Sagendorph is the manager of the community, and Mrs. Teresa Lawson is the property manager. Admission is on a first-come, first-serve basis. Applicants must pass a security check, drug test, and credit check.

Contact Information on How to Become a Resident

Croasdaile Village

Danielle Brown
Marketing Director

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

DanielleB@umrh.org
www.croasdailevillage.org

Cypress Glen

Elizabeth Jenkins
Marketing Director

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

ejenkins@umrh.org
www.cypressglen.org

Wesley Pines

Kimberly Walters
Marketing Director

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

kimberlyw@umrh.org
www.wesleypines.org

Wesley Ridge

Robin Sagendorph
Manager

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

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

You Make a Difference

As we reflect on the past year at the United Methodist Retirement Homes, we celebrate what truly special places each community is and how they are a place to call home. At the heart of what we do is to create caring communities where acceptance and care prevail for all.

We want to say a sincere thank you for your generosity this past year. This report is a testament to the spirit of compassion and support that permeates every corner of each of our communities.

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

In Fiscal 2024, donors gave to the UMRH Foundation and UMRH gifts totaling \$740,201 with \$616,509 coming in as new gifts, \$80,000 as payment on pledges, \$25,000 from the UMRH golf tournament and \$18,692 from the Annual Mother's Day Offering.

In addition, your support has allowed us to enhance the overall experience for every resident. From renovating communal spaces to upgrading amenities, your generosity has had a transformative impact on the quality of life within our communities. Through your contributions, we have been able to create an environment that promotes engagement, well-being, and happiness.

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



Caleb W. Baker
UMRH Director of
Development



Angie Pegram
UMRH Development Specialist
& Executive Assistant

About the Foundation

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

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

The UMRH Foundation, UMRH and the three communities are grateful to all donors of gifts small and large who have enhanced the art of living at our retirement communities through their giving.

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

Scholarships

Croasdaile Village Scholarships

The late Dr. Jack & Betty Fassett, Croasdaile Village residents, established the **John D. Fassett Endowment** for Dining Services Employee Scholarships in 2001. Since this scholarship's inception, 171 scholarships have been awarded for a total of \$192,000. Beginning in 2016, Dr. Fassett increased each award from \$1,000 to \$1,500 to account for inflation since the first awards were made in 2004. Other residents have made significant contributions to the fund over the years so that no qualifying applicant would be rejected. We are grateful to all who choose to donate to this fund to make these awards possible.

The late Dr. Garland Knott established the **Kathleen Knott Scholarships** in Healthcare Education in appreciation for the loving care his late wife, Kathleen, received in the Pavilion Healthcare Center in 2004. Since this scholarship's inception, 84 scholarships have been awarded for a total of \$49,425. Dr. Knott, who was a Croasdaile Village resident, contributed \$1,800 every year to fund three scholarships. He funded these annual gifts through a charitable gift annuity (CGA), giving him excellent tax advantages and payout rate. The CGA remainder was used after his death to establish the Garland and Kathleen Knott Scholarships in Healthcare Education Endowment. Other donors give to the scholarship fund so that no qualifying applicant is turned down. Earnings from the Endowment will also fund scholarships.

The Matthews Scholarship awards are made possible by Mrs. Kathleen Matthews and other Croasdaile Village resident donors and was founded in 2013. Since this scholarship's inception, 42 scholarships have been awarded for a total of \$42,000. Matthews Scholarships are open to qualifying employees enrolled in any curriculum as approved by the UMRH Foundation Scholarship Committee. The late Mr. & Mrs. Edward C. & Betty M. Matthews made provisions through a charitable remainder trust to fund the Edward C. and Betty M. Matthews Employee Scholarship Endowment.

Cypress Glen Scholarships

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.

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

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

Wesley Pines Scholarship

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



We welcome anyone who would like to contribute to these worthy causes to please do so by contacting our office or read our other ways to get involved.



25th Annual UMRH Golf Tournament

In 2024, we held our 25th annual UMRH Golf Tournament and raised over \$25,000 in funds to support Benevolent Care. That's a new record for our silver anniversary tournament and we are so grateful for all the players and sponsors. The tournament was at Hillandale Golf Course and started with an early morning greeting, coffee and doughnuts, and some golf motivation, finishing with door-prizes and awards to the winning teams. 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 26th annual tournament on October 27th, 2025.



Photo above: Roger Fuller, CV Director of Security, Rachel Harter, CV Future Resident, Keygan Mayfield of Servpro, and Craig Lloyd, CV Director of Communications team up for the 25th Annual UMRH Golf Tournament.

Get Involved

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

Make a current gift:

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

Consider a future gift:

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

Useful Verbiage for Estate Planning:

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

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

Time, Talent, and Treasure

Meet Sharron Nance

Through the eight and a half years of my tenure, I have had the pleasure to work with many residents and donors, none kinder or more diligent than Sharron Nance. In her time at Croasdaile Village, she has performed some amazing feats besides her philanthropic giving, including:

- Chaired the Residents' Communication Committee for 19 years
- Produced the 2 TV channels that are now 1390 and 1391. (Originally, there were 4 channels)
- Created a Resident Portal, similar to TouchTown
- Created an online magazine, similar to The Voice
- Managed 3 bulletin boards
- Established phone #2900 for Community announcements and activities with Bo Strohbehn.
- Early on, operated a continuing education program for team members.



Photo above: Sharron Nance admires Polly's Stream, named in loving memory of her mother, in the Hallas Nature Sanctuary.

I had the opportunity to sit down with her for an interview, here is an excerpt:

What inspired you to begin your philanthropic journey?

Over the years, I have been lucky, so many people have not. I love Croasdaile Village and felt at home – it's a wonderful place to live. My Dad was in the Pavilion for three and a half years, but before then, he was an avid outdoorsman. While in the Pavillion, we were still able to go on walks and that was important. After his death, the Nance Garden was named in his memory. My Mother, Polly, also loved the Garden! After that, if I saw a need, I wanted to help.

A few of the places on Croasdaile's campus where Sharron has made an impact are the Nance Garden in The Pavilion Healthcare Center (her favorite), the Main Dining Room, Polly's Stream, the Bistro, and the Nance Lobby.

What advice would you give others?

I'd say the best thing to do would be to get involved with the things that interest you. Meet people who enjoy the things you like and that's a great place to start.

Sharron also supports many other charities including ones that help with food insecurity, homelessness, animal well-being, environment preservation, medical work & research, and the health of our veterans.

To Sharron and so many others who give their time, talent, and treasure – we say a heartfelt thank you for making our communities great!

Donor Thanks

Your generous donations have been a great support to The UMRH, Inc., communities for 2023-2024.

OCT. 1, 2023 THRU SEPT. 30, 2024

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Mrs. Wilma P. White	Croasdaile Village Residents' Association, Durham	Kitchen and Bath Galleries, Raleigh
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The United Methodist Retirement Homes, Inc. Thanks You for Your Generous Donations!

Foundation Ethics and Donor Protection

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

DONOR BILL OF RIGHTS

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



Our 2024 Back Cover Features:
*Croasdaile Village Residents, Vonnie and
Virgil Torbet, enjoy a memorable dance at
our 25th Anniversary Celebration.*

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

UMRH.ORG

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In Kind



CRT*

*CGA: Charitable Gift Annuity

*CRT: Charitable Remainder Trust

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