## Impact Report

A YEAR IN REVIEW





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#### **Board & Leadership**

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EMPOWERING
INDIVIDUALS
WITH CHOICES IN
PURPOSEFUL
LIVING

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TRACEY JENNINGS Chief Operating Officer

CHRIS MARKWITH Chief Financial Officer

LISA LEGEER Chief Strategy and Integration Officer

PETER ROBINSON Chief Marketing Officer

#### **VISION**

VIBRANT LIVING WHERE FAITH, WELLNESS AND COMMUNITY FLOURISH

JODI LEONARD Vice President VBH Foundation

TAMMY ARNETTE Editor-in-Chief

ELIZABETH NEWPORT Graphic Designer



LifeSpireLiving



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#### **VALUES**

FAITH
SERVANT-LEADERSHIP
STEWARDSHIP
INTEGRITY
PEACE OF MIND
INNOVATION
JOY

COMMUNITY MATTERS A LifeSpire of Virginia Publication

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804-521-9214

# mpact 2 2

LifeSpire Team Members & Residents Supported Community Organizations

4000 Team Member Volunteer Hours IN CASH DONATIONS
AND GOODS
& SERVICES
TO PUBLIC CHARITIES
& ORGANIZATIONS



# CONTRIBUTING + COMMUNITIES + Lifespire of Virginia, Lakewood at Home & VBH Foundation

Benevolent Support Total:

1224738

LifeSpire of Virginia Gifts To The Greater Community:

IN-KIND \$18,645

\$63,871

The full **2022 SOCIAL ACCOUNTABILITY REPORT** can be found online at: *lifespireliving.org/social-accountability* 

#### Leadership Messages



For the past year, both senior living and the global economy have gone through a dramatic period of adjustment. Inflation, investment returns and labor pressures continue to impact our operations and our financials. I am proud of how LifeSpire's family of businesses have managed these challenges and demonstrated our agility.

LifeSpire of Virginia has remained resilient and emerged stronger. We maintain strong financial reserves and our communities have an active pipeline of future residents waiting to join the LifeSpire family. Through the tireless efforts of the VBH Foundation, and the generosity of donors like you, we continue to support those residents who have outlived their financial resources.

Looking ahead, I am excited about the future. LifeSpire's organizational priorities include **people**, operational excellence and growth and mission advancement. I am grateful for the dedicated team members in our home office and communities who are passionate about bringing LifeSpire's mission, vision and values to life every day. We are committed to providing career growth and opportunities for learning and advancement for all LifeSpire team members.

Growth is on the horizon and with that comes investing in technology, processes and systems to enhance the resident and team member experience. Internally, we will look to grow strategically in independent living and new and complementary business lines. Externally, we will continue to search for opportunities that align with our mission.

The stability of our organization, growth, investment in people and pursuit of excellence can be accomplished only through the collective efforts of everyone involved. From the Board of Trustees, team members and leaderships teams, to residents and families, we are **One LifeSpire**.

Thank you for your support.

Jonathan Cook President and Chief Executive Officer While we faced some challenges, 2022 was a strong year for Lifespire's family of communities. The first full year of operations at The Summit contributed \$8 million to LifeSpire's record high of \$110.2 million in total operating revenue for the year.

Independent living occupancy remained strong throughout the year, averaging 94.1 percent. Assisted living, memory support and health care occupancy averaged 88.2 percent for the year, resulting in overall average occupancy of 92 percent, well above national industry benchmarks.

The challenges we faced are the same challenges the entire senior living industry is facing: staffing, inflation and investment market volatility. Revenue fell short of expectations due to investment portfolio losses and staffing shortages that required us to reduce capacity in our health care areas. Expenses outpaced revenue, resulting in a \$4.4 million operating loss. Staffing and wage pressure continue to drive increasing salary and benefit costs. Over the last three years, we have experienced more than 37 percent growth in wages and related benefit expense. We recognized eight to 15 percent inflation depending on goods and services purchased. Our management team worked diligently to control expenses while maintaining the quality of service provided to residents.



Depsite these challenges, we have been successful by continually benchmarking financial, operational and staffing metrics, vigilantly monitoring our budgets and making appropriate adjustments. Above all, our team members' passion and dedication are key to our success.

Chris Markwith
Chief Financial Officer



Charitable giving in 2022 totaled more than \$2.4 million – a record set for the Virginia Baptist Homes Foundation. What was the driving force for the influx in investment to our mission? YOU!! The majority of gifts received - 94% - came from individuals and estates, recognizing that you, and those before you, understand the needs of seniors and are committed to supporting them. Gifts of all sizes and designations are equally important. What matters the most is that you give from your heart. Thank you for caring and helping to create space for those that need our help the most. Your continued generosity can set the stage for future years to come.

Jodi Leonard, CFRE
Vice President, VBH Foundation

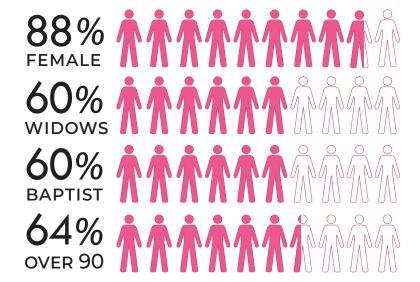


#### Statistics

#### Benevolent Recipients

Total
Residents

3 over 100



Benevolent Support

\$1,224,388

\$208,971

\$671,607

\$18,276

\$130,463

\$195,070

The Culpeper

Lakewood

The Chesapeake

The Glebe

The Summit

For more than 70 Years, LifeSpire of Virginia has remained committed to seniors. While LifeSpire of Virginia's communities have grown and changed over time, the mission to provide the best for seniors has not wavered. The Virginia Baptist Homes Foundation, through the generosity of loyal donors, is able to provide essential services and programs to enhance the lives of residents, no matter their level of care needs. Visit lifespireliving.org/give to learn more.

The VBH Foundation is proud to have earned a Gold Transparency Seal for 2023 through GuideStar/Candid Gold Transparency **2023** 

Candid.

#### Gifts Received By Cause



**\$1,178,577** 

Benevolet Fund



\$264,088

**Annuities** 



\$69,515

Special Projects



\$20,949

**Employee Crisis Fund** 



\$688,456

Community Restricted Funds



**\$109,696** 

**Endowment Funds** 



\$63,452

Spiritual Life Fund



\$8,967

**Employee Education Fund** 

#### Gifts Received By Entity



\$1,555,291

Trusts & Estates



\$701,526

Individuals



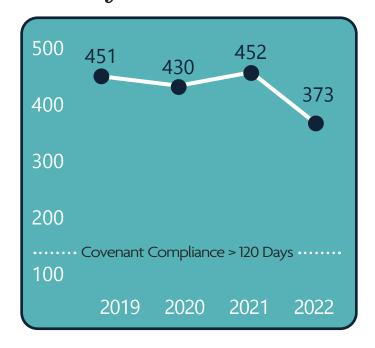
\$146,885

Churches, Foundations & Corporations

#### Financials

| — balance sheet  | t - |                             | <b>\</b> |  |
|--|-----|-----------------------------|----------|--|
| ASSETS   |     | 2022                        |          | 2021   |
| Current<br>Long-Term<br>Net Fixed Assets                 | \$  | 59,744<br>81,995<br>264,462 | \$       | 51,202<br>119,251<br>253,754                               |
| Total  | \$  | 406,201                     | \$       | 424,207  |
|  |     |                             |          |  |
| LIABILITIES & NET ASSETS                                 |     | 2022                        |          | 2021   |
| Current Deferred Revenue Other Long-Term Debt Net Assets | \$  |                             | \$       | 2021<br>26,576<br>113,722<br>48,294<br>252,510<br>(16,895) |

#### **Days Cash on Hand**



#### **Debt Service Coverage Ratio**



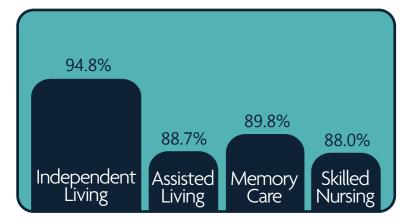
Consolidated financial statements audited by independent certified public accountants are available on our website at lifespireliving.org/financial-disclosures.

| - income statem  | ent —                              | <b>~</b> |  |
|--|------------------------------------|----------|--|
| STATEMENT OF OPERATIONS  | 2022                               | •        | 2021   |
| Operating Revenue Operating Expense Operating Income Unrealized Gains (Losses) Other Nonoperating Gains (Loss    | •                                  | •        | 108,205<br>104,389<br>3,816<br>3,580<br>(63) |
| Increase in Unrestricted<br>Net Assets   | \$ (18,527)                        | \$       | 7,333  |
|  |                                    |          |  |
| STATEMENT OF CHANGES<br>IN NET ASSETS  | 2022                               |          | 2021   |
|  | <b>2022 \$</b> (18,527)            | \$       |  |
| IN NET ASSETS  Increase in Net Assets  |                                    | \$       |  |
| IN NET ASSETS  Increase in Net Assets Without Donor Restrictions Increase in Net Assets With                     | <b>\$</b> (18,527)                 | \$       | 7,333  |
| IN NET ASSETS  Increase in Net Assets Without Donor Restrictions  Increase in Net Assets With Donor Restrictions | \$ (18,527)<br>(2,811)<br>(21,338) | ·        | 7,333<br>2,228                               |

#### **Average Occupancy Trend**

#### Average Occupancy 2022





#### J.T. Edwards Legacy Society



In January 1946 **Dr. James T. Edwards**, pastor of Culpeper Baptist Church, introduced the **idea of establishing a home for senior adults** to live out their retirement years. Over 70 years later, his vision continues to thrive and expand.

1996

The J.T. Edwards Society was established in 1996 to honor those who support Dr. Edwards' legacy through any form of planned giving, including bequests, charitable gift annuities, charitable remainder trusts or gifts of life insurance. These gifts provide the Foundation with the ability to plan for the future success of this ministry.

JTE Society members extend a lifetime of support through giving, volunteering and membership. Like Dr. Edwards, these visionary individuals are leaving their own legacy for future residents and the Foundation is proud to honor them through membership in this society.

Barbara J. Begor

Ruth Bokun

Curtis and Dee Brooking

Jacquelyn K. Brooks

Bert and Rose Browning

Montgomery Cale

Jeannette Cantrell

Hilary and Gina Claypool

Carolyn Coffman

Jonathan and Barbara Cook

Robert Copenhaver

Anne daCosta

Carole A. Edwards

Emily W. Fitzgerald

Linda Fleshman

Audrey Guild

Nelson and Cathy Harris

Monica Hillery

R. Craig and Sharon W. Hopson

Frances W. Ingram

Peyton and Nancy Jefferson

Latham and Linda Jones

Michael and Joan Keck

Maurice C. Law

Virginia and George Leftwich

Thomas and Elizabeth Mabe

Guy and Vivia Mattox

Joyce G. McCall

Lida and Donald McKinney

Joy McNabb

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Walter O. Smith, III

Ann Ruckman Smith

Beula Sprague

Elizabeth A. Stevenson

William and Nancy Trimble

Violet C. Varner

Julia Weikle

Jacquelin A. Werb

12 Anonymous Donors



## Legacy Giving



In 2022, 52 donors made their ultimate gift to LifeSpire through estate planning. Some created a trust that provides income every year to support benevolence and our communities. Others gave through bequests. These generous expressions of faith humble the LifeSpire team. While their passing saddens us, we remember the way they lived—with love and kindness for others.

Milo Andrews Trust

Estate of Virgil L. Athey

Hatcher Broadus and Therma Valentine Baxter Living Trust

William Hirst Bell and Annie Lee Bell Memorial Fund

Estate of Helen G. Bickley

Inez Duff Bishop Charitable Trust

Alma P. Bryan Trust

Ira C. and Bertha Johns Hopkins & Nancy Hopkins Bryan Fund

Gaybrooke G. Crittenden Trust

Culpeper Endowment Fund

Alton Carlton Elder Trust

John W. and Ruth B. Elmore Trust

David J. & Edith Evans Trust

Stanford L. Fellers, Jr. Memorial Trust

Estate of Frances J. Francis

Estate of Jacquelyn D. Gilbert

Estate of Harriet Grant

Mr. and Mrs. R. E. Graves Trust

Edward Russell Gray Memorial Fund

Woodford B. Hackley Trust Fund

John T. & Mamie Harris Trust

Laura J. Harris Trust

Lizzie Harvey Trust

Charlie Hatchel Living Trust Fund

Estate of Elizabeth Saunders Hinton

Samuel W. Holdcroft Trust Fund

C. Kenneth Horner Trust

Mary B. Hudson Trust Fund

Estate of Doris R. Isaacs

Louis R. Jones, Jr. and Peggy C. Jones Charitable Remainder Trust

Ora Jones Trust

Yvonne Stewart Kelly Fund

Estate of Gwendolyn J. Kennedy

Alice Ruth and Willie Parr Lewis Trust

Mr. and Mrs. Wilbur Jason Lyttle Living Trust Fund

Catherine H. Mahoney Trust

Estate of James E. Mallory

Lloyd C. and Ruth C. Moore Trust

Estate of Elizabeth A. Nalley

Estate of Marie C. Piper

Estate of Opal N. McCormick Quesinberry

Emily C. Ramstetter Trust

Estate of Mildred B. Roche

James M. and Ida F. Rose Trust

Waller J. Rucker and Sallie M. Rucker Trust

Loraine Russell Trust

J. Robert Stiff Memorial Trust

Hubert T. Thornhill Trust

Robert A. Treakle Trust

James T. Tunstall Trust

Georgia T. Witt Fund

One Anonymous Donor



## Annual Donors

Thank you to all of our supporters for investing in our mission to serve seniors.

A full roster of donors can be found on pages 16 - 25.

#### leaders

Ruth Bokun Jacquelyn K. Brooks Kent and Ann Brown John and Kay Cary Jonathan and Barbara Cook Ronald Elswick Ed and Jo Anne Foudriat Audrey Guild Thomas Held Robert and Shirley Houck David and Barbara Howell Robert Johnson Joseph and Mary Kent Maurice C. Law Virginia Marshburn Jerry and Nancy McKnight Joy McNabb Glenn and Pam Parsons Margie W. Rainey Hap and Kay Robson **Courtney Rogers** Doris Shea Ann Ruckman Smith Walter O. Smith, III Randall Street Elizabeth R. Thomas Margaret D. Williams One Anonymous Donor





#### individuals

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Louis Adams

Victoria Adams

Raymond and Pam Adkins

Jacqueline Ahmed

Michele Akers

Linda Anderson-Robinson

Gloria Andrews

Norma Archer

Tammy Arnette

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Barberie

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Alice Braswell

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Hazel Bray

Richard and Barbara Brewer

Tamika Brogden

Patsy Brooks

**Sharon Brooks** 

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Kent and Ann Brown

Robert Brown

William Brown

Bert and Rose Browning

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#### churches

Antioch Baptist Church

Averett Baptist Church

Bagby Memorial Baptist Church

Baptist General Association of Virginia

Black Creek Baptist Church, Franklin

Braddock Baptist Church

Bundys Chapel Baptist Church

Burdette Baptist Church

Carmi Baptist Church

Cedar Baptist Church

Crooked Oak Baptist Church

Culpeper Baptist Church

Deerfield Baptist Church

Derbyshire Baptist Church

**Dundas Baptist Church** 

Elk Creek Baptist Church, Mineral

Enon Baptist Church

Fairport Baptist Church

First Baptist Church, Martinsburg

First Baptist Church, Richmond

First Presbyterian Church of High Point

Gayton Baptist Church

Greenville Baptist Church

Greenwood Baptist Church

High Point Baptist Church

Hillcrest Baptist Church, Danville

Hillcrest Baptist Church, Ridgeway

Mattaponi Baptist Church

Melville Avenue Baptist Church

Mill Creek Baptist Church

Mount Tabor Baptist Church

Mountain Plain Baptist Church

Mountain View Baptist Church, Meadowview

Nelson Baptist Church

Newsoms Baptist Church

Pine Street Baptist Church

Plantation Road Baptist Church

Potomac Baptist Church

Providence Baptist Church, Henry

River Road Church, Baptist

Rodgers Chapel Baptist Church

Rosedale Baptist Church

Salem Baptist Church

Samaria Baptist Church

Sandy Ridge Baptist Church

Sedley Baptist Church

Shadowlawn Church

Southern Baptist Conservatives of Virginia

Stevensburg Baptist Church

Tsena Commocko Baptist Church

Union Chapel Baptist Church, Clarksville

Victoria Baptist Church

Washington Baptist Church

Waterford Baptist Church

Waverly Baptist Church

## foundations & organizations

7 Hills Art Club

A Little Off the Top Barbershop

Amazon Smile

American Legion Westhampton Post 84

Art for the Journey

Attane

Baptist Ministers' Relief Fund of Virginia

The Boston Foundation

Bull's Steakhouse

Herbert and Annie Carlton Foundation

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Thomas S. Crittenden

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The Glebe Staff

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# Social Accountability The Culpeper

## 24HRS VOLUNTEERED TO SUPPORT THE CULPEPER BUSINESS WOMEN



Last year, The
Culpeper Business
Women began meeting
at The Culpeper when
Marketing Director
Rose Wallace was
voted in as President
of the organization.

The meetings were loaded with insightful topics, thought-provoking speakers, scholarship presentations and priceless networking with likeminded women leaders. Culpeper team members volunteered a total of 24 hours to support the group and donated meeting space.

The Culpeper Business Women was organized to empower women in the workplace and in the home through support, scholarships and information. The group consists of business professionals who meet regularly to network with fellow women business owners, professionals

and entrepreneurs. Community initiatives support fundraising for S.A.F.E., Girls on the Run and Mom2Mom as well as providing scholarships to local girls.



## 1,000 AFGHANS KNITTED FOR VETERANS



The Close Knits of Culpeper group has existed for more than 10 years and has made and delivered over 1,000 afghans to veterans at VA hospitals around Virginia.

## \$8,790 RAISED FOR THE CULPEPER ROTARY CLUB

On November 10, 2022, The Culpeper hosted the second annual Flags for Heroes event for the Rotary Club of Culpeper. This event honored more than 200 veterans, service members, first responders and front-



line workers. Flags commemorating those who served were placed at the grounds of The Culpeper along James Madison Highway.

"Flags for Heroes is an event to honor those who inspired us while giving a visual tribute," said Director of Residents Services at The Culpeper and event coordinator for Flags for Heroes, Susan Hatfield.

Nearly \$9,000 was raised for The Rotary Club with proceeds benefiting the Rotary Foundation, Rotary International Polio Fund, Deep Well (Haiti Clean Water Initiative), Culpeper Cavaliers Baseball Team, The Culpeper Free Clinic Camp Fantastic and Special Love Ukraine Relief Fund. "We are proud to take this opportunity to give back to our local community," advised Hatfield.

# Social Accountability The Chesapeake

## 150 SCHOOL BACKPACKS DONATED



Residents and team members at The Chesapeake filled backpacks with donated school supplies for the 2022 school year. "At The Chesapeake, we believe in making a positive impact on the community we serve," said The Chesapeake's

Executive Director, David Loop. "That's why we started the Back-to-School Backpack Event as a way to give back to our team members and their families."

The Chesapeake residents filled backpacks that were then donated to team members' children who attend elementary, middle or high

school. To date, over 150 children have received backpacks filled with school supplies.

The Chesapeake residents plan to continue this tradition and make sure team members and their families start every school year off on the right foot.



## 20HRS VOLUNTEERED TO PENINSULA RESCUE MISSION

Residents at The Chesapeake are passionate about serving their local community and making a difference in the lives of others. Last year, residents and team members volunteered 20 hours of their time to the Peninsula Rescue Mission. From sorting non-perishable foods to packing them up for delivery, their hard work and dedication does not go unnoticed.





# Social Accountability Lakewood

\$64,000 DONATED TO ALZHEIMER'S ASSOCIATION



Residents and team members at Lakewood raised \$64,328 for the Richmond Alzheimer's Association to support finding a cure for the disease.

Sally San Soucie, community outreach liaison at Lakewood, led

the Alzheimer's fundraiser for 2022 as the group's team captain. A goal was set by Lakewood's Executive Director, Heather Crumbaugh, to raise \$50,000 for the cause, which at the time seemed like a lofty goal. Sally and her team of volunteers not only met that goal but exceeded it, which led to placing number 36 out of more than 52,000 national fundraising teams.

#### 500 HRS

VOLUNTEERED BY RESIDENTS AND TEAM MEMBERS

Lakewood residents and team members volunteered at Feed More to pack thousands of backpacks of food for students in need in 2022. A total of more than 500 hours was donated throughout the year by Lakewood residents and team members.



### \$35,000 IN CRISTO REY SPONSORSHIPS



Last year, LifeSpire sponsored four students participating in Lakewood's Cristo Rey Richmond High School Corporate Work Study Program. Cristo Rey is a Catholic learning community that educates young people of limited economic means to become men and women of faith, purpose and service.

In June of last year, Cristo Rey selected Lakewood as its 2022 Royal Impact Award

Recipient for the positive effect the team had on the students personally and professionally.

## Lakewood at Home



## 57HRS VOLUNTEERED TO SUPPORT LOCAL ORGANIZATIONS

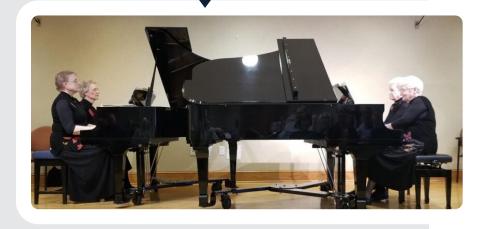


Lakewood at Home team members volunteered 57 hours to support local Richmond organizations including Feed More, The Mac and Cheese Festival (supporting Richmond Alzheimer's Association) and George Washington Carver Elementary School.

# Social Accountability The Glebe

## 49TH ANNUAL PIANO BENEFIT CONCERT

This popular piano ensemble began in New York in 1974 where Carole Edwards performed professionally with her ensemble for 20 years. Following a move to Virginia,



Carole's concerts continued for 12 years at Smith Mountain Lake and for another 17 years at The Glebe.

Each year, the ensemble raises money through donations by attendees for a charity of choice. The 2022

concert benefited the Tunnel to Towers Foundation, an organization supporting the brave FDNY firefighters who answered the call on 9/11/01. The Tunnels to Towers Foundation supports injured first responders and veterans, fallen first responder families and gold star families.



#### RESIDENT-SPONSORED SCHOLARSHIP AWARDS



In August of last year, The Glebe and its Resident Council presented resident-sponsored 2022 scholarship awards to three team members. Faith Overbay, Brennan Corell and Abigayle Lynch (not pictured) all received scholarships to help fund their educational goals.



## 186 CASES OF FOOD DONATED

A team of residents and team members at The Glebe performed one minute of planks for every 10 cans of food donated to Feeding Southwest Virginia. In total, 186 cases of food were donated to help provide nourishment to the local community. Feeding Southwest Virginia was founded in 1981 and proudly commemorates over 40 years of fighting hunger and changing lives through community partnerships.



# Social Accountability The Summit

\$7,095 RAISED FOR ALZHEIMER'S ASSOCIATION

The Summit residents and team members came together to raise money for the Central and Western Virginia Alzheimer's Association to support research, education and individuals affected by this disease. Through



various fundraising events, including 50/50 raffles, Casual for a Cause and a Team Kick-off Day, The Summit team raised \$7,095.

Brenda Dixon, marketing director for The Summit, took matters into her own hands to raise money for Alzheimer's by running in the Chicago Marathon with sponsored donations. Her noble undertaking of months of training for the 26.2-mile race paid off. Collectively, she and her husband raised \$3,400 for the cause.



## \$249 RAISED FOR BREAST CANCER AWARENESS



Summit residents and team members raised \$249 and donated eight volunteer hours to the Susan G.
Komen Foundation for Breast Cancer Awareness. Residents and team members were able to learn more about the importance of early detection and sign up for a free mammogram with the Centra Health Mammo Van.



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