

WESTMINSTER CANTERBURY RICHMOND  
& WESTMINSTER CANTERBURY FOUNDATION  
**2017 ANNUAL REPORT**





## Our Vision

“Improving the lives of  
those we serve every day”

## Our Mission

“As a faith-based charitable organization,  
we will provide services, specific to need,  
in a compassionate, professional, holistic manner,  
through an inspiring environment  
and dynamic leadership for our residents,  
employees and others we serve.”

## Our Values

CARING - compassion and empathy for those we serve

ETHICS - using wisdom and experience to do the right thing

LEADERSHIP - maintaining a position of excellence

TEAMWORK - working together to achieve common goals

INNOVATION - creative pursuit of excellence

COMMITMENT - steady focus on the Vision and Mission

STEWARDSHIP - prudent use of all resources

---

## THANK YOU TO

everyone who supports Westminster Canterbury Richmond’s  
charitably-funded programs! Donor information reflects the period  
from 1/1/2017 to 12/31/2017. Every effort has been made to ensure  
accuracy of the Westminster Canterbury Foundation donor lists.  
We apologize for any errors or omissions. Please bring them to  
the attention of Westminster Canterbury Foundation  
by calling 804.264.6702.

## THANKS ALSO TO

Proofreader: Resident Elizabeth Stallings

Photographers: Residents Robert Coles, Grace Colhoun  
and Jo Ann O’Hara\*.

Financial data and some statistics are as  
of 9/30/2017. A copy of the complete  
Auditor’s report for fiscal 2017 is available  
by request from the Business Office by  
calling 804.264.6056.





*Thank you to Eric Price,  
Digital Media Specialist,  
whose videography is featured  
throughout our Annual Report.*

**2017 ANNUAL REPORT** WESTMINSTER CANTERBURY RICHMOND  
& WESTMINSTER CANTERBURY FOUNDATION

# Table of Contents

Moving Forward in Bold Ways ..... 4

Leadership 2017 ..... 5-6

Westminster Canterbury Outreach ..... 7

Community Involvement ..... 8-9

Westbrook Society ..... 10-11

Resident Leaders..... 12-13

A Season for Growth and Purpose..... 14

Life Enrichment ..... 15

Tribute Program ..... 16-17

Leaders in Giving ..... 18-34

Growing in Spirit ..... 23

Renovation Update ..... 25

Performing Arts Highlight Reel..... 28

The Westminster Canterbury Way ..... 31

Our Nurses Make the Difference..... 33

Live Life Well Through Fitness ..... 35

Heritage Society ..... 36

We All Share, Grow and Learn..... 37

Named Endowments and Funds..... 38-40

In Bloom..... 41

Consolidated Financial Information ..... 42



# Moving Forward in Bold Ways

Greetings,

As I look back on 2017 and forward into 2018, I am filled with thanksgiving and anticipation. We are a strong community characterized by a spirit of generosity evidenced by deeply caring relationships, a generous Fellowship Program and a true margin of excellence made possible by dedicated work and financial support. Because of our strength, we are in a unique position to continue to raise the standard others want to follow.

For several years we have been in deep planning mode – assessing future needs, studying research in senior services and striving to understand evolving demands. All indicators are green for Westminster Canterbury Richmond to move forward in bold ways. Our organization is strong in many ways – reputation, market, finances, strategy, leadership, workforce and collaboration between our Corporation and our Foundation. It is time to provide an even higher level of service to our current residents and grow in order to welcome new residents.

Over the last year, we worked with architects to design the best ways to add 100 new units to our campus. We're exploring adding a state-of-the-art Fitness Center and redesigned, greatly improved dining experiences in the location of our current Promenade. During 2018, I anticipate that we'll move forward in significant ways, and I am excited to see our plans materialize.

As we continue to lean forward, retaining our devotion to compassion and excellence – our missional hallmark – we will together enter a new exciting chapter!

Very truly yours,



JOHN BURNS, PRESIDENT & CEO

*\* Design and decor photos shown above are inspiration ideas. Final plans are under development.*



# Leadership 2017

## EXECUTIVE STAFF

**John D. Burns**  
PRESIDENT & CEO

**W. Russell Gardner**  
VICE PRESIDENT & CFO

**William H. Blackwell**  
VICE PRESIDENT HEALTH SERVICES

**Robert D. Cox**  
VICE PRESIDENT SUPPORT SERVICES

**Windley P. Gravatt**  
VICE PRESIDENT WORKFORCE SERVICES

**Gayle Hunter Haglund**  
DIRECTOR RESOURCE DEVELOPMENT

**Debra S. Jacobsen**  
DIRECTOR RESIDENT SERVICES

**The Rev. Dr. Lynn McClintock**  
DIRECTOR PASTORAL CARE

## RESIDENTS ASSOCIATION EXECUTIVE COMMITTEE

**Barbara P. Chavatel**  
PRESIDENT

**Adrienne L. Maxwell**  
FIRST VICE PRESIDENT

**Robert E. Coles**  
SECOND VICE PRESIDENT

**Marion D. George**  
SECRETARY

**Lucy B. Negus** ★  
ASSISTANT SECRETARY

**John E. "Jack" Thornton** ★  
IMMEDIATE PAST PRESIDENT

**Rodney Word** ★  
MEMBER-AT-LARGE

★ Retiring Officers

*In February 2018, the following  
were appointed to the slate of officers:*

**Pat Kawana**  
**Katie Lowden**  
**Harriette Will**

## WESTMINSTER CANTERBURY MANAGEMENT CORPORATION

### OFFICERS

**Howard J. Kies**  
CHAIR

**Russell T. Aaronson III**  
VICE CHAIR

**John D. Burns**  
PRESIDENT & CEO

**W. Russell Gardner**  
TREASURER,  
VICE PRESIDENT & CFO

**William H. Blackwell**  
VICE PRESIDENT  
HEALTH SERVICES

**Robert D. Cox**  
VICE PRESIDENT  
SUPPORT SERVICES

**Windley P. Gravatt**  
VICE PRESIDENT  
WORKFORCE SERVICES

**Danny W. Felty, M.D.**  
MEDICAL DIRECTOR

**Betty M. Lissenden**  
SECRETARY

### TRUSTEES

**Russell T. Aaronson III**  
EXECUTIVE VICE PRESIDENT/ CHIEF COUNSEL  
GRAYCO, INC.

**David E. Constine III** ★  
PARTNER  
TROUTMAN SANDERS LLP

**Margaret T. Corwin**  
HEALTH INSURANCE AGENT  
AFFINITY GROUP UNDERWRITERS

**The Rev. Dr. Alexander W. Evans**  
PASTOR  
SECOND PRESBYTERIAN CHURCH

**Thomas M. Hogg**  
BUSINESS DEVELOPMENT MANAGER  
SIEMENS

**Sidney R. Jones III, M.D.**  
PHYSICIAN  
BON SECOURS MEDICAL GROUP  
WEST END INTERNAL MEDICINE

**Howard J. Kies**  
CEO/FIRM MANAGING PARTNER  
CHERRY BEKAERT LLP

**Stephanie Peters Neal**  
CHIEF HUMAN RESOURCES OFFICER  
CHERRY BEKAERT LLP

**Jean L. Oakey**  
DIRECTOR OF NONPROFITS/CPA  
WELLS, COLEMAN AND COMPANY

**James White Richter**  
DIRECTOR OF FINANCE  
THE JEFFERSON HOTEL

**Cullen B. Rivers, M.D.**  
PHYSICIAN  
PULMONARY ASSOCIATES OF RICHMOND

**James G. Rose, Jr.**  
RETIRED MANAGING DIRECTOR  
BANK OF AMERICA MERRILL LYNCH

**M. Pierce Rucker, Esq.**  
RETIRED ATTORNEY/SHAREHOLDER  
SPECIAL ASSISTANT TO BOARD OF DIRECTORS  
SANDS ANDERSON, PC

**G. Everett B. Reveley**  
FIRST VICE PRESIDENT  
EXECUTIVE ADMINISTRATION  
DAVENPORT & COMPANY

**Anthony M. Spensieri, M.D.\***  
CHIEF MEDICAL OFFICER  
HENRICO DOCTORS' HOSPITAL

**Donald M. Switz, M.D.**  
PROFESSOR EMERITUS, MEDICINE  
MEDICAL COLLEGE OF VIRGINIA/VCU

**Herbert B. Thomson**  
RETIRED DIRECTOR OF RESEARCH  
THOMPSON, SIEGEL & WALMSLEY LLC

**Archibald Wallace III**  
RETIRED ATTORNEY  
WALLACEPLEDGER, PLLC  
MINISTER/MODERATOR  
PRESBYTERY OF THE JAMES

★ Retiring Trustees

*In January 2018, the following were elected  
as Trustees:*

**Christopher M. Michalik**  
PARTNER  
MCGUIREWOODS LLP

**Angela P. Phelon**  
DIRECTOR BUSINESS SERVICE/DEVELOPMENT  
SENIOR CONNECTIONS

## WESTMINSTER CANTERBURY FOUNDATION

### OFFICERS

**Lilo Simmons Ukrop**  
CHAIR

**Christopher M. Carney**  
VICE CHAIR

**John D. Burns**  
PRESIDENT

**Gayle Hunter Haglund**  
SECRETARY

**W. Russell Gardner**  
TREASURER

### TRUSTEES

**Richard S. Andrews, Jr. ★**  
DIRECTOR  
RSM US LLP

**John W. Bates III ★**  
COUNSEL  
MCGUIREWOODS LLP

**Benjamin S. Candland, Esq.**  
ATTORNEY  
MCGUIREWOODS LLP

**Christopher M. Carney**  
RETIRED PRESIDENT AND CEO  
BON SECOURS HEALTH SYSTEM

**Mary C. Frediani**  
REALTOR  
ENGEL AND VOLKERS

**Wendell Fuller**  
PRESIDENT AND CEO  
FULLER WEALTH ADVISORS, INC.

**Myfanwy Monroe Hall**  
COMMUNITY VOLUNTEER

**Pemberton Boinest Hall**  
GRANT ADMINISTRATOR  
MEMORIAL FOUNDATION FOR CHILDREN  
SUSAN G. KOMEN CENTRAL VIRGINIA

**Franklin B. Heiner ★**  
FIRST VICE PRESIDENT INVESTMENT ADVISOR  
BB&T SCOTT & STRINGFELLOW

**The Rev. Canon  
Robert G. Hetherington**  
RETIRED RECTOR  
ST. PAUL'S EPISCOPAL CHURCH

**Adrienne G. Hines**  
RETIRED DIRECTOR OF DEVELOPMENT  
GUGGENHEIM MUSEUM

**Basil M. Jones, Jr.**  
SENIOR VICE PRESIDENT  
U.S. TRUST

**Ralph C. Joynes**  
RETIRED PRESIDENT  
UNITED STATES GYPSUM COMPANY

**Bruce A. Kay**  
VICE PRESIDENT  
MARKEL CORPORATION

**James F. Lipscomb, Jr.**  
EXECUTIVE VICE PRESIDENT  
DAVENPORT & CO. LLC

**True F. Luck**  
COMMUNITY VOLUNTEER

**Mary H. Madge**  
RETIRED REGIONAL DIRECTOR  
STATE DEPT. OF SOCIAL SERVICES

**Frances V. Massey**  
COMMUNITY VOLUNTEER

**J. Gordon Rawles, Jr., M.D. ★**  
RETIRED  
ORTHOVIRGINIA, INC.

**E. Lee Showalter**  
RETIRED  
SENIOR VICE PRESIDENT  
JAMES RIVER CORPORATION

**Ellen E. Spong**  
DIRECTOR OF INSTITUTIONAL SERVICES  
UNION BANK & TRUST

**John H. Thomas, Esq.**  
ATTORNEY  
THOMAS, KARCESKI & KARMILOVICH, P.C.

**Lilo S. Ukrop ★**  
MANAGING PARTNER  
CORRUGATED PARTNERS, LLC

**Howard C. Vick**  
PARTNER  
MCGUIREWOODS LLP

★ Retiring Trustees

In January 2018, the following were  
elected as Trustees:

**Walter E. Bundy III, M.D.**  
OPHTHALMOLOGIST  
VIRGINIA EYE INSTITUTE

**Brian M. Cann**  
SENIOR VICE PRESIDENT AND SENIOR  
INVESTMENT STRATEGIST  
WELLS FARGO PRIVATE BANK

**Mark M. Gordon**  
CHIEF EXECUTIVE OFFICER  
BON SECOURS RICHMOND-EAST  
MEMORIAL REGIONAL MEDICAL CENTER  
RICHMOND COMMUNITY HOSPITAL  
BSV OUTPATIENT INFUSION CENTERS  
BON SECOURS MEMORIAL COLLEGE OF  
NURSING

**Frances W. Kay**  
RETIRED NURSING ADMINISTRATOR/  
EXECUTIVE DIRECTOR  
MEDICAL COLLEGE OF VIRGINIA ALUMNI  
ASSOCIATION

**Patricia P. Pusey**  
RETIRED INSURANCE BROKER  
CONNECTICUT MUTUAL

### 2017 FOUNDATION VOLUNTEERS

**A. Cabell Ford, Jr.**  
**Wilson R. Trice, Esq.**  
**E. Massie Valentine, Jr.**





# Westminster Canterbury Outreach

We've been imagining and working toward a Richmond, Virginia, region where all people live life well and where the needs of elders are fully met.

Our Live Life Well RVA Symposium in October explored healthy aging and the results of a comprehensive community needs study commissioned by Westminster Canterbury Foundation. Four key findings summarize the overall needs.

**#1 - Housing.** More than 60% of those 65 and older in Richmond are renters who fear running out of financial resources. A high percentage of seniors spend more than 30% of available income on housing, compromising their ability to pay for other necessities. Nearly 75% of elders in the area feel there is a need for affordable housing.

**#2 - Transportation and Walkability.** Nearly 75% of respondents do not feel public transportation is adequate or safe for elders, making it extremely hard to shop, visit the doctor or simply see friends.

**#3 – Aging in Place and Access to Services.** Navigating, identifying and accessing health care and social services is reported as very difficult for elders themselves and children of seniors.

**#4 – Chronic Disease Management.** Nearly 40% of elders in our region are living with four or more chronic conditions. Obtaining care for these health challenges is worrisome.

At our symposium, seven excellent speakers shared vital information about resources for seniors across our region. We learned how positive attitudes about aging make a very real difference to healthy aging.

We developed [www.livelifewellrva.org](http://www.livelifewellrva.org), where you can download the full Community Needs Report and a one-page Key Findings document. We invite you to visit the site, explore the barriers and challenges we know exist – and then choose ONE

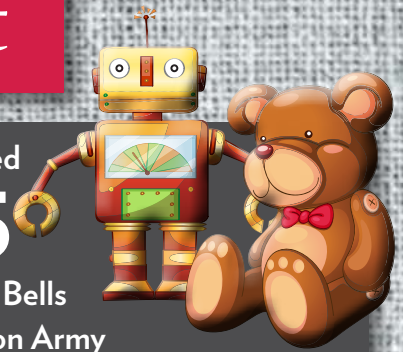
**NEW THING** you can do to be of help!

Watch videos of the symposium speakers at:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)


Copyright: www.allfreedownload.com · www.freedsignfile.com · www.pisabay.com



# Community Involvement



Staff sponsored

**45 + 5**

Angels and Silver Bells  
through The Salvation Army  
Angel & Silver Bell Tree

## SPONSORSHIPS, SUPPORT, STAFF VOLUNTEERS AND IN-KIND DONATIONS

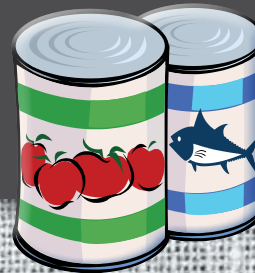
- Alzheimer's Association
- CARITAS Furniture Bank
- Dinwiddie High School
- Diversity Thrift
- Emmanuel Episcopal Church
- Executive Women International
- FeedMore: Central Virginia Food Bank
- Ginter Park United Methodist Church Clothes Closet
- Goochland Free Clinic and Family Services
- Goodwill Industries
- GRAVA
- Greater Richmond Age Wave Coalition
- LeadingAge – Texas Hurricane Relief
- Liberation Mission Church
- Management Round Table
- New Clay House
- Overbrook Presbyterian Church
- Hurricane Relief - Puerto Rico
- Richmond Animal League
- Richmond Habitat for Humanity
- Senior Connections
- Sheltering Arms Rehabilitation Hospital
- South University
- St. Mark's Episcopal Church
- Westminster Canterbury Foundation's Community Needs Assessment
- The Salvation Army
- United Way of Greater Richmond and Petersburg
- Veterans Outreach

**37**



community ministers and  
lay people attended *When  
Words Fail* dementia seminars  
led by our Chaplain Kathy Berry

**4,807 lbs.**



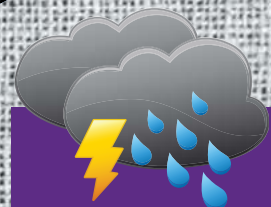
collected for  
Central Virginia  
Food Bank



Estimated

**\$4,000**

worth of used  
appliances and kitchen  
cabinets donated  
to Richmond Habitat  
for Humanity



**\$15,327**

gifted to senior  
centers affected by  
hurricanes in Texas



4 on-campus  
blood drives

=

171

potential lives saved



The Annual Live Nativity hosted by Pastoral Care and the Mary Morton Parsons Health Center Recreation team has become a cherished Christmas event, enjoyed by residents, staff and the Child Development Center kids.



Each year residents and staff contribute personal devotions to create the *A Lenten Journey* booklet. In 2017, our Pastoral Care Team gifted 6,375 copies to churches throughout the Richmond area.

210

resident  
volunteers

=

25,018

hours  
volunteered

332

non-resident  
volunteers

=

9,215

hours  
volunteered

## INTERNSHIPS, HOST SITE & OUTREACH

- 3 Information Technology interns (384 hours)
- 3 Pastoral Care interns (892 hours)
- 3 Recreation Therapy interns (1,564 hours)
- 2 Partnership for the Future interns
- 2 Administrators-in-Training (945 hours)
- 1 Child Development Center intern (30 hours)
- 1 Resident Services intern (251 hours)
- 1 Social Work intern (182 hours)
- Alcoholics Anonymous and Al-Anon meetings
- Area Clergy Gatherings
- Henrico County Fire Department training site
- Hosted the Episcopal Diocese of Virginia Retired Clergy Luncheon
- Hosted the Live Life Well RVA Symposium
- Joint Administration Learning
- Richmond Unit Parliamentarians
- Three Chopt Presbyterian Church Officers Retreat
- The New Community School Partnership
- Virginia Blood Services drive site
- *When Words Fail* Pastoral Care Memory Support training sessions for area clergy and caregivers (two seminars)

Total volunteer  
hours given in 2017

34,233



34 teens volunteered 1,624 hours here over the summer. They helped in several departments across campus including with our horticultural team.





2017 Residents Association Executive Committee:  
(from left) Jack Thornton, Immediate Past President;  
Marion George, Secretary; Lucy Negus, Assistant  
Secretary; Adrienne Maxwell, 1<sup>st</sup> Vice President; Barbara  
Chavatel, President; Bob Coles, 2<sup>nd</sup> Vice President; and  
Rodney Word, Member-at-Large.

## Resident Leaders

Westminster Canterbury Richmond residents are part of the leadership of our community. Nineteen resident committees oversee areas from facilities to performing arts. These resident volunteers play a critical role in shaping the environment in which they live. The Residents Association Executive Committee stands at the head of these committees, ensuring that all resident voices are heard regarding life at Westminster Canterbury.

The resident committees are: Buildings and Grounds, Chapel/Pastoral Care Services, Civic, Dining Services, Echo Shop, Finance, Floor Representatives, Flowers, Forum, Furniture Room and Men's Corner, Gardens and Greenhouses, Libraries, Performing Arts, Recreation, Recycling, Technology, Treasure Chest, Wellness, Visual Arts and Craft.



**1,200+**

attendees to  
the 2017 Unique  
Boutique Fall  
Craft Fair



**4,466**

print and audio  
books checked  
out from our  
on-campus libraries

**242.5**  
tons recycled in 2017  
  
**=**  
  
**4,122.5**  
trees saved

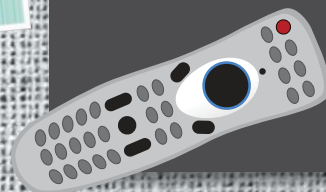
**5,925**

visits by  
Pastoral Care  
Services  
volunteers



**45+**

DVDs checked  
out from the  
movie library  
each month



**83**

entries  
to the 2017  
Daffodil Show  
hosted by  
Garden and  
Greenhouse  
volunteers

**\$1,000**

Raised by the  
Treasure Chest  
through eBay sales





866

trip  
participants



52 residents  
participated in the two  
walking excursions  
hosted by Wellness  
and Life Enrichment.

Echo Shop sales  
contributed  
**\$52,039**  
to Fellowship Fund



Furniture Room  
& Men's Corner  
sales contributed  
**\$52,953**  
to Fellowship Fund



Treasure Chest sales  
contributed  
**\$52,588**  
to Fellowship Fund



**250+** training and  
assistance programs  
offered in 2017 by  
the Technology  
Committee



**50**  
new residents welcomed through  
Floor Representative coordinated  
special events



Flower Committee  
volunteers exchanged  
**1128**  
used vases with  
nearby florists  
for fresh flowers



**1,016**  
attendees at  
the five lectures  
hosted by the  
WCR Forum  
Committee



**20,570**  
theater tickets collected  
by Performing Arts volunteers



**\$6,403**  
was raised for the Annual Fellowship  
Fund during the Unique Boutique  
Committee's Fall Craft Fair

**4.23**

Fellowship recipients supported by  
resident-run shops for one year





# A Season for Growth and Purpose

Often, people fear growing older, assuming that their most effective years may be over. But nothing is further from the truth. Our senior years offer a unique combination of wisdom and increased freedom to schedule one's time. There are many ways to embrace this important season of life, whether you are the one stepping into this next adventure or a loved one watching it unfold.

One of the joys of working at Westminster Canterbury Richmond is seeing and experiencing what healthy aging looks like. For many of our residents, the requirement to work full-time in a demanding role is past. Now there is time to grow in ways long denied. In elderhood, one can grow intellectually, spiritually and socially. Many now have time to spend longer precious moments with family, creating memories that will form their legacy. Many grow in their sense of purpose – digging deeper into the one or two causes that have long been of deep concern and finding effective ways to make a real difference. In elderhood there is the opportunity to grow in the ways of love.

The danger for many seniors is feeling they are taking this journey alone, and they become isolated and lonely. If you have an elder loved one or neighbor, you can help. Recognize that there is richness in aging and affirm their wisdom and experiences through listening and sharing.

Help connect elders in your life to their faith communities, to lifelong learning and social opportunities. Talk about their concerns for people or causes and help connect them to purposeful activity. There are resources in every region, certainly in the greater Richmond area, to assist seniors in many ways. Finding these can be a challenge. We've developed a new website to inspire healthy aging, and the Partners page will direct you to many helpful resources.



For these resources and to watch Dr. E. Ayn Welleford's presentation on how you can disrupt ageism, go to:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)



# Life Enrichment

**2,650**

Miles  
Traveled  
During the  
Spring Walking  
Challenge



**35**

Venue  
Trips with

**601**

Riders



**550**

Eclipse  
Glasses  
Handed  
Out



**1,196**

Activities in  
Chesapeake

**1,300**  
Activities  
in Piedmont

**988**

Activities  
in The  
Gables

**832**

Activities in  
Monticello

**676**

Aquatics  
Offerings



**1,248**

Activities  
in Shenandoah

**884**

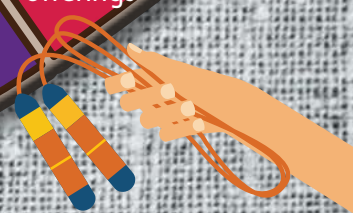
Activities  
in Pavilion

**884**

Group  
Exercise  
offerings

**988**

Activities  
in Avalon



**9**

Senior  
Summer  
Classes served

**400**

Students



**44**

Excursions



# Leaders in Giving

Inspiring generosity makes it possible for Westminster Canterbury Richmond to have a margin of excellence you won't find just anywhere. More than 1,000 generous individuals supported many projects and purposes on our campus in 2017. This year, we are honoring your generosity in a new way. Donors are listed in giving categories according to their total giving to the Foundation, regardless of which program area they supported.

The Foundation is committed to ensuring the best life possible for our residents – a vibrant life filled with connection, purpose, engagement, growth and more. Donors give to three primary areas that make this possible: the FELLOWSHIP PROGRAM, AREAS OF GREATEST NEED, and SHARE YOUR PASSION.



**\$1.6** Million  
Given to the  
**FELLOWSHIP  
FUND** in 2017

**Fellowship** provides seniors-in-need with life care – housing, meals, medical expenses and all the vital living Westminster Canterbury has to offer. Around 110 individuals are served through this program annually with the promise that no one will ever be asked to leave due to an inability to pay. We have the largest financial aid program for a single-site retirement community in the entire country! You make that possible.

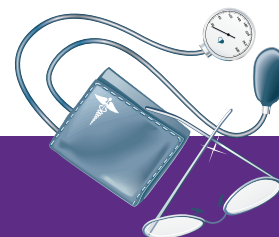


**113**

Residents received  
financial aid through  
our Fellowship  
Program in 2017

**\$574,000**  
was donated to the 2017  
Annual Fellowship Fund by the  
Lettie Pate Whitehead Foundation

**61%** of current  
Fellowship recipients are  
**age 86+**



**\$496,000+**  
was provided for insurance  
and uncovered medical  
expenses in 2017



## Our Areas of Greatest Need

provide financial support for projects and programs that make the biggest difference in the vibrant lives of our residents. Many of these are worthwhile concepts we have piloted for which there is not ongoing funding. It also allows us to test new ideas to see if we can solve problems and challenges facing our organization and industry. As those solutions present themselves, we share the results with other organizations that may be able to adapt them for their own use.



**\$443,261**  
Given to **AREAS OF  
GREATEST NEED**  
in 2017



**\$1,148,640**  
Given to **SHARE  
YOUR PASSION**  
in 2017

**33**  
monthly attendees  
of the Balance  
Program



**51**  
Fall Prevention  
Program  
participants over  
**4** sessions



**4,676**  
Hours of  
Clinical  
Training  
Provided



**4,859**  
positive emotional  
connections achieved  
through Memory  
Support Therapy  
sessions

## Share Your Passion –

donors are committed to various areas that have touched their lives in important ways, and they give back with gratitude to support those programs. Healthcare Excellence ensures that every resident who needs a stay in Parsons Health Center, whether temporarily or permanently, has the best possible experience. Cultural Arts inspire, engage, and bring joy. Memory Support improves the lives of those impacted by dementia and their loved ones. Workforce Support develops our dedicated employees. Pastoral Care feeds the spiritual needs in all of us. Our Child Development Center brims with intergenerational magic. The list goes on – and you generously support all these programs that make Westminster Canterbury the special place it is today, after more than 42 years of generous impact.

*Thank you*

so much for your support!

If you have questions, please contact  
Gayle Hunter Haglund at Westminster  
Canterbury Foundation at 804.264.6702.

Copyright: www.allfreedownload.com : www.freedownloadfile.com : www.gizaboy.com



# Growing in Spirit

Vibrant Pastoral Care programming has been part of Westminster Canterbury Richmond since we opened our doors in 1975. This tradition continues with extensive educational programs available to all residents. Education is an important part of one's spiritual development, and our Pastoral Care department provides many opportunities for nurturing the spirit.

Last year Lynn McClintock, Director Pastoral Care, arranged for a special Interfaith Series Panel Discussion. At the event a Rabbi, Imam and Episcopal Priest shared how to find common ground among diverse faith communities. Since then, there has been an Interfaith Service of Peace, a Holocaust Remembrance Service and a resident trip to the Islamic Center of Virginia to nurture interfaith relationships.

Chaplain's Lecture series delved into the lives of those who shaped Christianity today and questions that don't have easy answers. Among the topics were *God and the Dark Side*, *Spirituality of the Saints*, *Martin Luther and his Wild Boar Series*, *Spiritual*

*Practices: What Are They Good For?* and *Lectio Divina*. Pastoral Care's Movie with a Message events proved a popular way to reach residents through film. These social gatherings led to deeper discussions.

The *When Words Fail* book and DVD developed by Chaplain Kathy Berry have been requested by churches and spiritual leaders across the country. Workshops teaching local faith communities ways to nurture the spirit of those living with dementia continue to reach hundreds each year.

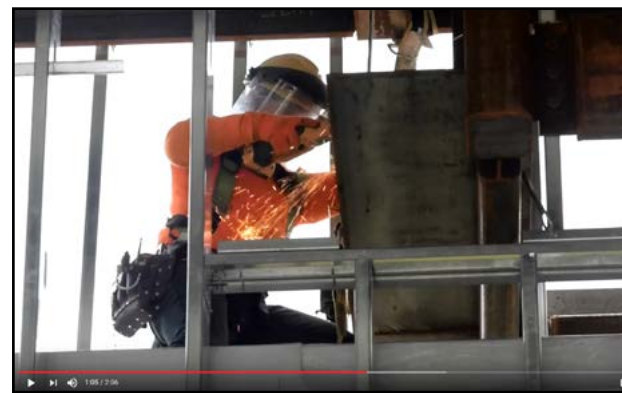
The Rev. Steve Eason was our David F. Peters Lecture speaker. There were few empty seats

available as he gave a thought-provoking presentation on *What is the Future of the Mainline Church?*



If you'd like to watch Rev. Eason's presentation go to: [www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)





# Renovation Update

Our Tower exterior renovation project began in August 2017. Each stage of construction has been documented and shared with residents and the community through weekly Renovation Update videos. The video archival project was the brain child of Project Manager Tom Henning and Digital Media Specialist Eric Price. Shared on our in-house station TV970, Resident Apps Website and social media venues, the videos have been a huge hit.

At just over six months, the project has come a long way and larger construction milestones are being crossed as we near the completion of the porte cochère. The expanded porte cochère will allow larger excursion buses to park and unload easily. The resulting new Tower entrance will be full of sunlight and open spaces befitting a grand hotel. The Tower exterior is also being maintained and updated. An Exterior Insulated Finish System (EIFS) is being added to the main, 7<sup>th</sup> and 8<sup>th</sup> floor levels to ensure the exterior is as lovely as the interior.

At the same time our Roof Terrace is undergoing a remodel that started with complete demolition. The beams are up now and a new structure has taken shape. Final highlights will be a raised ceiling, expanded space and energy-efficient glass curtain wall system that will provide stunning vista views of the city. This amazing new entertaining and gathering area will include outdoor patios that are fully accessible for everyone.



To watch a montage of Renovation Update highlights go to: [www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)



# Performing Arts Highlight Reel

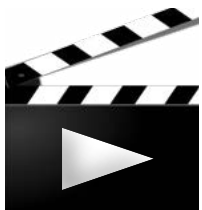
The Sara Belle November Theater is buzzing. The seats are full, and the audience is chatting about their excitement for the upcoming show. Friends discuss the latest news. Family members catch up with their loved ones.

The lights dim, and the audience applauds. Brightly colored lights stream across the stage as music fills the theater. An actor delivers his soliloquy. An opera singer enthralls with her aria. The comedian amuses with his jokes.

The show ends. The lights come back up as the last applause dies away. The audience files out, smiling and laughing together about the experience they just shared together. It is another engaging evening at Westminster Canterbury!

These experiences are a regular occurrence on our campus – more than 50 per year! The best of Richmond's local performing arts groups entertain and engage with our residents regularly throughout the seasons. Exciting touring productions bring even more joy and connection, with favorites in 2017 including Golden Dragon Acrobats, the music of Benny Goodman, and Hot Club of San Francisco.

The best part – there is no cost for tickets. 100% of the performance fees are paid for by generous charitable gifts to Westminster Canterbury Foundation. Residents come from every area on our campus to enjoy these shows together. Our theater and vibrant programming set Westminster Canterbury apart from other senior living organizations nationwide!



To see performance highlights, go to:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)



The 2017 recipients are (clockwise from top left) Hall of Fame recipients Vicki Fowler, Health Care Administration; Shakeela Webster, Dining; LaTonya Howard, Pavilion; Scott Coats, Information Technology; and Brendan Hayes Appreciation Award recipient Charles Carter, Housekeeping.

# The Westminster Canterbury Way

Living at Westminster Canterbury Richmond is a way of life, and we have a special way to make certain our values are honored. Our customer service model is The Westminster Canterbury Way (TWCW), and it guides how staff members treat each other as well as how residents are treated. It is what makes working and living here both pleasant and enriching.

New employees receive a great deal of dedicated training about TWCW when they start, and we keep the training going with additional courses for all employees every year. Our values are our hallmark and we make certain to keep them at all times. CELTICS is the acronym for the values we hold dear – Caring, Ethics, Leadership, Teamwork, Innovation, Commitment and Stewardship.

We even have an employee recognition program to honor staff and publicly acknowledge their

commitment. Each year we showcase five team members as our Hall of Fame winners. They represent the essence of TWCW with an exemplary dedication that goes above and beyond.

Our organization's vision is improving the lives of those we serve every day, and to us that starts with a friendly, helpful, mission-focused, people-centered way of being. We smile at one another, greet everyone we see in the hallways, ask what we can do to help and respond quickly to requests. Positivity on a daily basis soon becomes contagious with benefits for everyone.



To watch the video of our 2017 Hall of Fame and Brendan Hayes Awards Presentation go to:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)





# Our Nurses Make the Difference

Nurses play a critical role in our healthcare excellence. In order to ensure they have the right tools from the beginning, every new hire goes through our Preceptor Program. Developed here, this orientation and mentoring program provides new hires with the confidence and competence to be successful team members and caregivers.

Depending on their level of experience, nurses may spend from four to eight weeks in training and rotate through a number of living areas in the Mary Morton Parsons Health Center. There are classroom sessions, hands-on training and formal evaluations.

The Preceptor Program is a meaningful example of our commitment to being an innovator in senior living. Having this type of program, coupled with a dedicated full-time Clinical Educator on staff, is not unusual in large hospitals, but highly unusual for a continuing care retirement community.

When we surveyed nurses about their impressions of our Preceptor Program training, here's what they had to say.

"After more than 30 years of working in various healthcare facilities, this is my dream job. It was also the best orientation I've ever received."

"I have confidence in our team because I know we have all been trained to do things the same way, at the same high standard."

"Having extra caregivers on the floor benefits not just the residents, who get more personalized attention, it also benefits our staff. I am able to get to know my residents so well. I know them, their family members – some of the family members even recognize my voice on the phone!"

"In some facilities, only one Certified Nursing Assistant per floor is CPR-certified. Here, all of us are. A few seconds can make a huge difference when it comes to saving someone's life, and all of us are equipped with those necessary skills."



If you are interested in learning more about our nursing team, go to:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)



# Live Life Well Through Fitness

The times, they are a-changin'! With 10,000 people turning 65 each day and life expectancies climbing, it is more important than ever to Live Life Well! Westminster Canterbury Richmond is committed to ensuring that our residents experience vital living at all stages of life. One of the ways we do this is through our comprehensive wellness programming. Each week, there is an extensive schedule of fitness classes, spiritual and cultural activities and more that engages our residents in vibrant living!

Thanks to an Innovation Grant from the Foundation, our Wellness team tried many new fitness classes in 2017 to see which ones make the biggest difference in the lives of our residents.

Gentle BeMoved, a dance and movement class, was led by our fitness specialist Taryn Young. The first six-week session progressed through many styles of music and dance, from backup singer moves to Latin rhythms and the roaring 20s! The class was so popular that another six-week session is being held in 2018.

Ballroom dancing lessons with Rigby's Jig were

another wellness hit. At each session, half the class learned to lead, half learned to follow, and everyone switched partners frequently. Teen volunteers joined residents for one class. Dancing improves fitness, balance and memory skills and participants made lots of new friends.

Laughter Yoga got our residents giggling. Members included residents from all areas of campus.

In a series of Senior Challenge Sampler classes, residents were kept on their toes as they tried several fitness options including a 20/20/20 strength and aerobic workout, barre moves, power yoga and Nia© dance.

One of our most popular ongoing classes is High-Intensity Strength Training. While there are obvious health benefits, fitness specialist Patti Pickering has found that there are other benefits that may surprise you.



To learn more, go to:  
[www.lifelifewellrva.org/video](http://www.lifelifewellrva.org/video)





# We All Share, Grow and Learn

What can a toddler teach a senior? A lot. Westminster Canterbury Richmond's Intergenerational Program brings the two age groups together and fuses two common needs: to share and to be loved.

"Our commitment to improving the lives of those we serve includes providing opportunities for rich and meaningful experiences. This program does just that through projects, games and other fun activities designed to meet the needs of both children and seniors," says Lisa Williams, director, Westminster Canterbury Richmond Child Development Center. "Intergenerational programming is a planned agenda involving a myriad of disciplines including a social worker, teacher, certified nursing assistant and recreational therapist. What looks like just plain fun actually has a lot of thought behind it."

A colorful, carefully patched together quilt hangs in the Westminster Canterbury Child Development Center lobby as a tangible symbol of the daily interactions between seniors and children.

Together, both groups worked to put together as many patterns as they could find. "The quilt's mismatched squares visually represent the diversity and variety of ways and methods we share, grow and learn," says Ms. Williams.

Intergenerational programming is enjoyed throughout the campus. Many residents regularly volunteer, while less mobile seniors enjoy drawing pictures and singing with the children.

"Fewer children grow up in the same household with grandparents than in the past," says Ms. Williams. "Intergenerational programs are one way of introducing young children and seniors to each other in a natural setting."

For Westminster Canterbury Richmond residents, children and employees, intergenerational magic enhances the sense of community.

To watch a video about one of our Child Development Center resident volunteers go to:  
[www.livelifewellrva.org/video](http://www.livelifewellrva.org/video)







# In Bloom

Fiscal 2017 was another successful year for Westminster Canterbury Richmond. Our waiting list remains strong for all areas of independent living. Westminster Canterbury was affirmed a BBB+/Stable rating in June 2017 by Standard and Poor's due to Westminster Canterbury's favorable market position, improving operating performance and overall balance sheet strength.

In fiscal year 2017, there were 53 new sales, which yielded gross entry fees of \$16 million dollars. This was a significant factor as Westminster Canterbury finished the year with a debt service coverage ratio of 2.84, exceeding the bond covenant. Days cash on hand was very strong at 1,128 days and the reserve ratio continued strongly at 158.9%.

Westminster Canterbury Foundation continues to be a vital element of our mission to provide financial support for seniors-in-need. By the end of fiscal 2017, a total of 113 residents received Fellowship support. The 2017 actuarial valuation indicated that Westminster Canterbury's obligation to provide future services to residents did not result in a liability as of September 30, 2017.

## OCCUPANCY

As of September 30, 2017, the community includes 505 independent living apartments and houses, 94 assisted living apartments, 72 memory support apartments, and 158 health center apartments for a total of 829. Occupancy for independent living residences was 94.7% and for the Mary Morton Parsons Health Center was 90.1%. Occupancy for the assisted living residences was 89.2%.

## REVENUES

Revenues increased by \$18,027,000 over prior year. This was due to a \$15,767,000 increase in investment income, a \$1,693,000 increase in resident services, a \$451,000 increase in other income and a \$115,000 increase in earned entrance fees.

## EXPENSES

Expenses decreased by \$842,000 over prior year. This was due to a \$569,000 decrease in resident services, a \$388,000 decrease in administrative expenses and a \$168,000 decrease in depreciation and amortization. These decreases were offset by a \$232,000 increase in general services and a \$44,000 increase in interest expense.



# Consolidated Financial Information

WESTMINSTER CANTERBURY MANAGEMENT CORPORATION & SUBSIDIARIES

YEARS ENDED SEPTEMBER 30, 2017 AND 2016

## Assets

	2017	2016
Current Assets	\$15,347,107	\$18,467,019
Assets Limited As to Use, Less Current Portion	1,586	3,212
Investments	198,249,017	176,852,160
Interest in Perpetual Trusts	2,062,064	1,923,117
Property, Plant and Equipment, Net	126,024,330	129,382,107
TOTAL ASSETS	<u>\$341,684,104</u>	<u>\$326,627,615</u>

## Liabilities and Net Assets

Current Liabilities	\$12,094,469	\$11,156,958
Bonds Payable Less Current Portion	89,669,291	93,252,822
Fair Value of Interest Rate Swap	38,413	207,463
Entrance Fees	113,139,592	114,656,016
Other Liabilities	5,031,598	12,520,794
TOTAL LIABILITIES	<u>219,973,363</u>	<u>231,794,053</u>

NET ASSETS	<u>121,710,741</u>	<u>94,833,562</u>
------------	--------------------	-------------------

TOTAL LIABILITIES AND NET ASSETS	<u>\$341,684,104</u>	<u>\$326,627,615</u>
----------------------------------	----------------------	----------------------

## Revenues

Resident Services	\$38,261,621	\$36,568,658
Earned Entrance Fees	15,232,797	15,117,373
Investment Income	15,974,514	206,679
Contributions and Other Income	11,374,246	10,923,307
TOTAL REVENUES	<u>80,843,178</u>	<u>62,816,017</u>

## Expenses

Direct Resident Care	14,184,025	14,753,955
General Services and Utilities	18,220,371	17,988,203
Administrative, General and Marketing	12,737,442	13,125,661
Fundraising and Grants	347,622	340,269
Depreciation and Amortization	10,565,279	10,733,399
Interest	3,171,280	3,127,152
TOTAL EXPENSES	<u>59,226,019</u>	<u>60,068,639</u>

OPERATING INCOME	21,617,159	2,747,378
------------------	------------	-----------

OTHER INCOME		
Unrealized Gains	725,724	10,016,725
Change in Fair Value of Interest Rate Swap	169,050	156,105
TOTAL OTHER INCOME	<u>894,774</u>	<u>10,172,830</u>

EXCESS OF REVENUES, GAINS AND OTHER SUPPORT OVER EXPENSES	22,511,933	12,920,208
---	------------	------------

OTHER CHANGES IN UNRESTRICTED NET ASSETS		
Changes in Plan Assets and Benefit Obligations and Other Changes	<u>362,369</u>	<u>(1,059,528)</u>
INCREASE IN UNRESTRICTED NET ASSETS	<u>\$22,874,302</u>	<u>\$11,860,680</u>

Summarized information from 2017 Audit. The Auditor's report for fiscal 2017 is available from the Business Office by request at (804) 264-6056.



## Our Vision

*Inspire Generosity*

## Our Mission

Growing from our roots in faith, we nurture the spirit of generosity of Westminster Canterbury Richmond to ensure the best life possible for our residents and to cultivate leadership in senior services.

## Who We Are

Donors to Westminster Canterbury Foundation support Fellowship, areas of greatest need and share their passions. The Foundation's **FELLOWSHIP PROGRAM** provides need-based financial support to more than 100 people each year. Since 1975, more than 540 people have received aid totaling \$70 million and every resident is assured that no one will ever be asked to leave due to an inability to pay through no fault of their own. Gifts to the **AREAS OF GREATEST NEED** are utilized for Innovation Grants and other essential priorities. Donors who **SHARE THEIR PASSIONS** support programs such as healthcare excellence, memory therapies and spiritual support, chaplaincy programs and internships, wellness and fitness programs, enhancements and scholarships for the Child Development Center, workforce development and thriving creative programs that include studio and performing arts. Leadership in senior services is made possible by the Foundation every year.



You, our generous donors, are precious to us.

Your inspiring generosity to Westminster Canterbury Foundation can be felt and seen everywhere – from performances and art classes to excellent healthcare, wellness activities, unparalleled memory support and spiritual depth. Your impact is felt by all who receive Fellowship support and know the security and peace of mind we promise every resident.

OUR HEARTFELT THANKS TO EACH OF YOU.



# WESTMINSTER CANTERBURY RICHMOND

1600 WESTBROOK AVE.  
RICHMOND, VA 23227

[www.WCRICHMOND.org](http://www.WCRICHMOND.org)  
[www.facebook.com/wcrichmond](https://www.facebook.com/wcrichmond)



NON-PROFIT  
ORGANIZATION  
U.S. POSTAGE PAID  
PERMIT NO. 729  
RICHMOND, VIRGINIA

WESTMINSTER  
CANTERBURY  
RICHMOND

WESTMINSTER  
CANTERBURY  
FOUNDATION