



THE
LIFESPACE
FOUNDATION
THE FOUNDATION
2015 REPORT

TABLE OF CONTENTS

5	Sue McEntee, Director
6	Executive Summary
8	Butterfly Garden
9	Supported Initiatives
10	Benevolence Fund
11	Support and Investments
12	Music Endowment
13	LifeBio® Restores Memories
14	Emergency Assistance Program
16	Financial Summaries
17	Bake Sales
18	The Joy of Reading
19	Foundation Committees

The Foundation Report is a story of sharing. Through the gifts donors share, communities are enriched, hopes enlivened and people are helped to feel secure.





Thomas and Marilyn McKean relax on a sunny Village on the Green day.



Team member Jesse Brookshire pours for Deerfield residents Tom and Judy McKenna.



Marijane Schrader lunches with friends at Harbour's Edge.



Abbey Delray chef Eduardo Alvarez checks on resident Mel Namon's entrée.



It's coffee and prose time for Elizabeth Carson at The Waterford.



Rehabilitation director Josephine Lerulli takes a break with resident Simone Eiseman at Abbey Delray.

SHARING: GIFTS



Under the guidance of Kelly Michel at Friendship Village of South Hills,

Nancy Bucey, Joyce Sandberg and Jean Snodgrass work out.

LETTER FROM THE DIRECTOR



New to the Lifespace Foundation in 2015, I had a wonderful beginning. Residents opened their homes and shared their rich histories. Communities welcomed me, inviting me to learn their traditions. A “shared journey” could not be a more fitting description for my start with Lifespace.

I felt the passion and energy of residents as they talked about the mission we share. And I was especially pleased to hear how benevolent care has become a topic of discussion, with many coming to understand how vital it is to our growth.

We worked together to enhance processes and practices so they reflected the Foundation’s mission more clearly. All 12 communities created Foundation Advisory Committees dedicated to seeing their Foundation funds applied for the benefit of residents.

As we prepare to celebrate the 25th anniversary of the Lifespace Foundation in 2017, I’m eager to express my gratitude to all who’ve welcomed me to the Lifespace family – and to those who give to our communities through the Lifespace Foundation.

I’m pleased to present to you the 2015 Foundation Report. Contained within are the words and photos that tell a truly amazing story of goodwill. It’s a story of shared gifts, of shared journeys and of generosity – and it’s straight from the heart.

A handwritten signature in black ink that reads "Sue".

Sue McEntee, Director
Lifespace Foundation



At Village on the Green in Longwood, resident Bette Ann Leider pauses while painting.



EXECUTIVE SUMMARY

The Lifespace Foundation has steadfastly kept its promise to serve the health and welfare of Lifespace residents for nearly 25 years. In 2015, we revisited our mission, realigned the scope of services, programs and grant-based assistance, and made sure we would be ever more faithful to that promise.

In 2015, all communities established Foundation Advisory Committees to keep executive directors and regional operations directors apprised of each community's unique needs. Those committees offer perspectives on the application of designated and undesignated Foundation funds within the community — and they help tell the story of the Foundation's mission and services to residents. The volunteer members of the Foundation Advisory Committees in each Lifespace community represent the Foundation's generous spirit — and the goodness of Lifespace people in stepping forward to serve.

Also by year's end — and for the first time in the Foundation's history — each community had an endowed benevolent fund category. Expected to grow to support 100 percent of each community's benevolent care needs, these funds signaled the Foundation's increased involvement in Lifespace residents' lives.

Throughout the year we sought external support, because the types of programs and services we provide in many of our communities appeal to potential funders whose missions are similar to ours. The endeavor showed encouraging potential for growth.

We expect that nurturing philanthropic support into 2016 and beyond will help Lifespace communities grow. Together, we'll observe the 40th anniversary of Lifespace Communities, Inc. — even as we anticipate the 25th anniversary of the Lifespace Foundation in 2017. So here's to a year filled with opportunities.

We're ready!

Deerfield friends Betty Durden, Charlotte Stickler and Glenis Nunn strike a pose.



Friendship Village of South Hills residents Carol Gilfillan, Rich Holan

and Betty Barrow share a laugh while working on pottery.

BUTTERFLY GARDEN PROVIDES A SERENE SETTING



Catherine Marshall loves a butterfly garden. Years ago, she and her daughter spent many hours in Philadelphia's Morris Arboretum, where the butterfly garden piqued her interest. When she had the chance to create a butterfly garden at her condo, she was hooked.

Seven years ago, Catherine moved to Abbey Delray in Delray Beach, and she made her butterfly passion known. The community responded by offering her space to redevelop an old butterfly garden.

"I couldn't have been happier — not just for myself, but for the joy I knew having a butterfly garden would bring to everyone here," Catherine said.

Catherine worked hard to get it up and running. Now she oversees it while other resident volunteers maintain it with financial gifts designated specially for the garden. It's proven to be a popular spot for residents to share with families and friends.

"I'll never get tired of watching the butterflies, but it's even more gratifying to see how many others have taken up watching them too," Catherine said.

Catherine Marshall savors a moment in the Abbey Delray butterfly garden.



Barbara Harbus strolls to the Abbey Delray butterfly garden with Pandy.



Dave Jones browses in the Red Barn at Oak Trace.

SHARING GIFTS, ENRICHING COMMUNITIES, TOUCHING LIVES



Throughout our 12 communities in 2015, the Lifespace Foundation supported all kinds of programs, initiatives and features, including:

- Butterfly gardens at Abbey Delray and Deerfield
- Caring Hands, offering little extras to sweeten the days of residents in the Abbey Delray South Health Center
- Dickinson Lecture Series, featuring dinner and presentations hosted by Deerfield
- Highwood Park Classical Music Fund for semiannual musical performances at Friendship Village of Bloomington
- J. Molineri Garden at Beacon Hill
- Library funds at Harbour's Edge and The Waterford
- LifeBio® program to help Oak Trace residents write their autobiographies
- Loop audio system for Claridge Court's auditorium
- Card room for Friendship Village of South Hills' residents and their families
- Putting green at Deerfield
- Retail shops at Oak Trace (Gift Shop, Resale Shop, Annex, Red Barn), which in turn generate benevolence funds



BENEVOLENCE KEEPS A FAMILY IN THEIR HOME



He's a self-made man, proud of the fact that after decades in the printing business, he and his wife had enough in the way of assets to qualify them to move into Beacon Hill, a suburban Chicago Lifespace community.

"We lived out by Elgin (Illinois) and I hated to go," he said, "but I couldn't manage my big garden anymore after I had my stroke. We looked at a lot of places, and Beacon Hill felt right. There was Life Care

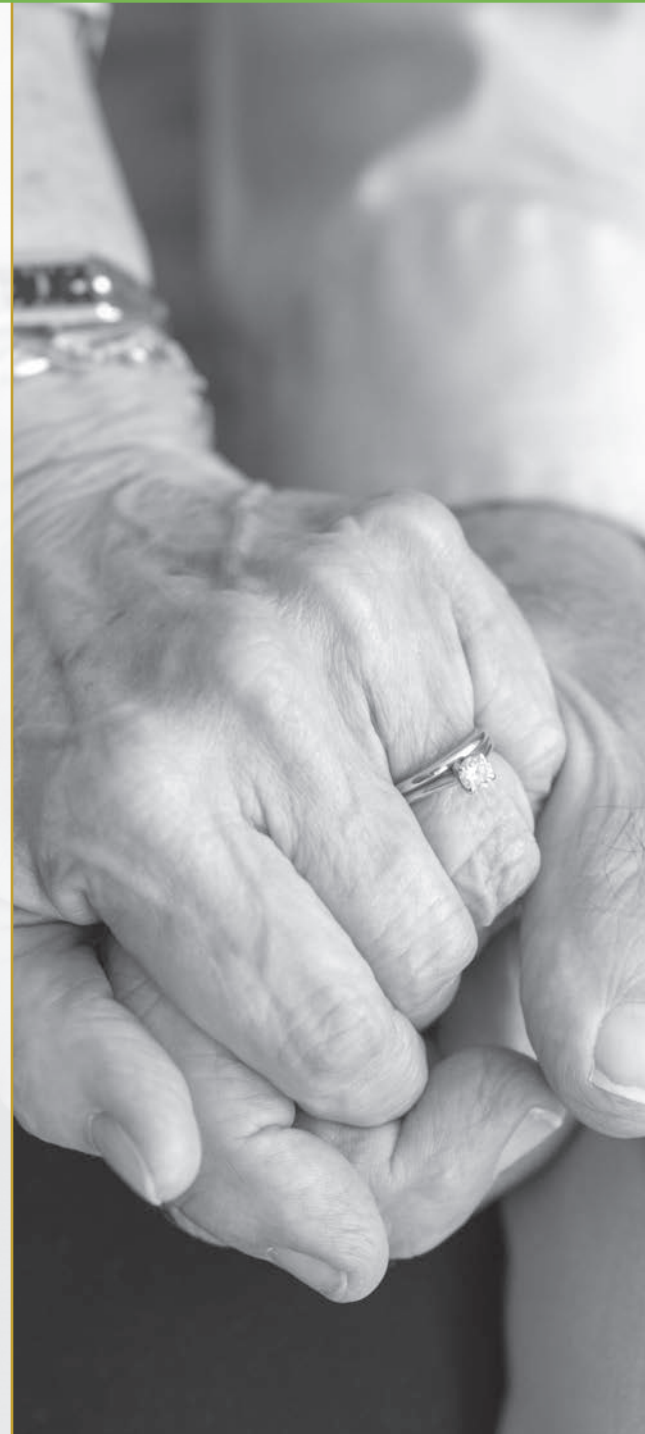
and the friendliness. We thought, 'This will be a good move.'"

The Shilakis — George, now 93, and Anne, 91 — became residents in the late 1990s, and all was well for several years. They made friends and became a part of the community. To them Beacon Hill was as much "home" as any house in which they had ever lived.

"But then a couple of years ago, we realized our money wasn't going to last." George said he remembers thinking, "Wait a minute, we've got a problem." The worrying began. "I couldn't sleep, wondering where we'd have to go and how we'd find a cheaper place."

George and Anne determined that they were going to need to move, but because they weren't sure how much longer they would be able to make ends meet, they knew they also had to make Beacon Hill aware there was a problem.

"I especially remember how hard it was for George to tell me what was happening, because he's such a proud man," said Blaire Goldstein, the community's executive director. "He was someone who had worked hard for every dollar he had ever made, and he saved that money well. He hadn't done anything wrong, and yet he felt he had failed."



Blaire reassured George and Anne that the Lifespace Foundation would help, supplementing the amount the couple could pay toward their monthly fee with benevolent care funds.

"She told us we wouldn't have to leave," George recalled. "Before we moved in, we had read about help being available to people who need it. But it's different when you realize that you're the one whose money is running low. It's a scary situation."

Blaire said over the course of her 12 years as Beacon Hill's executive director, she's helped about a dozen residents with benevolent care needs. She's proud of Lifespace.

"We're a not-for-profit, and things like this serve as a reminder that that's what our mission is," Blaire said. "As people live longer — and we're thrilled they're living longer — it becomes more common that residents, through no fault of their own, run low on money. We're not going to make them leave their homes when we have the resources to help them stay."

George said the conversation with Blaire made him especially thankful he and Anne had chosen to live at Beacon Hill.

"That night, I slept the best I had in months," George said. "We were so grateful. There are some very good people running this organization."

Anne and George Shilakis are longtime Beacon Hill residents.

TEAM MEMBERS SHARE THE VISION ... THROUGH THEIR PAYCHECKS

According to Sue McEntee, Director of the Foundation, an increasing number of team members made regular contributions through their paychecks to the Resident Benevolent Fund, Scholarship Fund or Team Member Emergency Assistance Program in 2015.

“Team members love the seniors they work with, and they see how their Foundation support can make a difference.

“They believe in the Foundation’s mission. It’s 100 percent support,” Sue said. “Everybody gives.”



At Friendship Village of South Hills, team member Jon Young offers friendly coaching to resident Jean Brown.



Drake University student Haley Jenkins poses with Deerfield’s executive director, James Robinson.



Team member Marisol Vazquez chats with resident Jerrie Zimmerman at Beacon Hill.

THE MOST POPULAR AND ADVANTAGEOUS GIFTING VEHICLES

Among the generous, these three gifting vehicles are proving most common. Each provides the donor with the satisfaction of making a difference for Lifespace seniors.

CASH CONTRIBUTIONS

Straightforward and simple, cash donations can be directed toward the donor’s choice of community for a particular project or program. Typically, cash donations also provide the donor with tax benefits.

NON-CASH ASSET GIFTS

Real estate, vacation homes, automobiles, collectibles – these assets and others can provide the donor a way to support the Foundation with tangible gifts.

CHARITABLE GIFT ANNUITIES

Through a contract that doesn’t require a lawyer, the donor can make a gift of a lump sum of cash, marketable securities or other assets to the Foundation. In return, the donor will receive fixed payouts – which are at guaranteed rates typically much higher than from other financial tools like CDs and savings bonds.



MUSIC IS A GIFT

Dorothe Reinhardt performed her first concert in 1998. She was 89.

With a lifelong, successful career as a classical music pianist and instructor, that performance for her fellow Friendship Village of Bloomington residents was only the first of many.

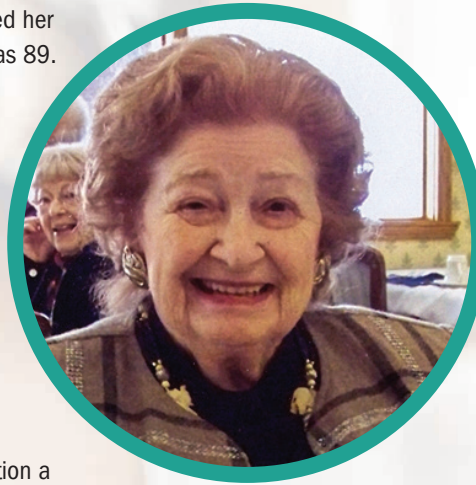
By the time Dorothe passed away in 2011 – at 102 – she had set in motion a plan to continue bringing classical music into the Minnesota community. She knew Friendship Village of Bloomington residents had an affinity for the genre.

“My mom’s goal was to make people happy,” said Joani Olsen Kenney, Dorothe’s daughter. “They get to enjoy the music that they’ve known during their lifetime. And the people who live at Lifespace communities love this music.”

The Highwood Park Classical Music Fund was established in 2011. Under the management of the Lifespace Foundation, the fund sponsors at least two classical music performances for Friendship Village residents each year. The shows are open to all residents, but catered to Health Center residents. Tadeusz Majewski, The Ariel Trio and many others have performed.

“My role is to ensure that it continues,” Joani said. “My mother wanted to have classical music for people in the Health Center. People are moved because they love classical music – and they don’t hear enough of it, especially in long-term care.”

With the fund growing, Joani hopes Friendship Village of Bloomington will be able to organize more shows. She loves knowing that her mother’s vision brings joy and stirs memories for Friendship Village residents and their families.



RECALLED MEMORIES ENRICH LIVES



Until recently, Anneliese Schlottmann's memories of life in Germany during World War II have been limited. She was a child then, and it was a long time ago.

When her children ask her about those memories today, however, she has a different, more detailed story, and she can hand it to them ... in a book.

A resident of Oak Trace in Downers Grove, Illinois, Anneliese has taken advantage of an online program called LifeBio®.

Reviewing four phases of their lives, the program asks questions that spark residents' memories. The process can continue for as long as six months, and there are both online and offline versions.

Susan Collins, Life Enrichment Coordinator for Oak Trace, said the program is adaptable to whatever the residents want it to be.

"They can gear it to their own needs," she said. The autobiographies they compile can be as detailed as they wish. When they complete the process, residents can order leather-bound editions of their stories. Nearly 30 Oak Trace residents participated in LifeBio in 2015.

"My children grew up hearing me reminisce," Anneliese said. "I thought they might like to have those stories on paper."

TEAM MEMBER EMERGENCY ASSISTANCE PROGRAM

Rough patches. Who hasn't stumbled at some point? Sometimes there isn't much you can do about it. Sometimes there is.

For 11 years, one team member cruised along smoothly, employed in a Lifespace community. She advanced her career. She started a family. And then in 2015, a bone-rattling rough patch.

"My world turned upside down," she said.

She loaned her mother a significant amount of money for housing, but unexpected and serious health issues prevented her mother from repaying the loan. Counting on those funds for her own housing, she had no choice other than moving into low-cost motels — one after another — with her two small children. She called shelters and soup kitchens. No one could help. Soon she discovered she was trapped, unable to get herself and her family back on their feet.

"I was scared. I had my little children. Summer was coming, and I would need childcare. I couldn't lose my job," she recalled. "We were within a week of having to live out of my car."

With no other options available, she set her embarrassment aside, swallowed her pride and approached the human resources department at the Lifespace community where she was employed. But when she revealed the secret of her sudden hardship, she was met with unexpected understanding and hope. She was told she would more than likely qualify for a grant from

Lifespace's Team Member Emergency Assistance Program. And within 24 hours, she learned the Foundation would provide the deposit money needed for an apartment for her family.

"I broke down and cried," she said. "I was so relieved. A huge burden was lifted off me."

A sense of normalcy returned in the following months — along with a healthy dose of optimism. To support her career advancement in serving seniors, the Foundation Advisory Committee also granted funding to help pay for her nursing education so she could become a licensed practical nurse. She'll take her nursing exam in 2016.

"I can't thank everyone enough," she said. "I'm so much happier, more confident and focused, and on the right path in my life and career."

Today she designates a small portion of every paycheck to support the Lifespace Team Member Emergency Assistance Program.

"You never know when you're going to need it," she said. "Things can happen that are out of your control and your world can fall apart."

"I'm in a perfect place now at work and at home. I have my family now — my Lifespace family."

To support the Team Member Emergency Assistance Program or learn more about it, visit your community's human resources director.



Due to the sensitivity of the subject, we'll keep the team member's identity anonymous.



Janis Cooper paints at Harbour's Edge.

FOUNDATION FINANCIAL STATEMENTS

Balance Sheet (in thousands)

ASSETS	FY 2015	FY 2014
Cash & investments	\$6,237	\$6,408
Other assets	\$731	\$830
TOTAL ASSETS	\$6,968	\$7,238

LIABILITIES & NET ASSETS

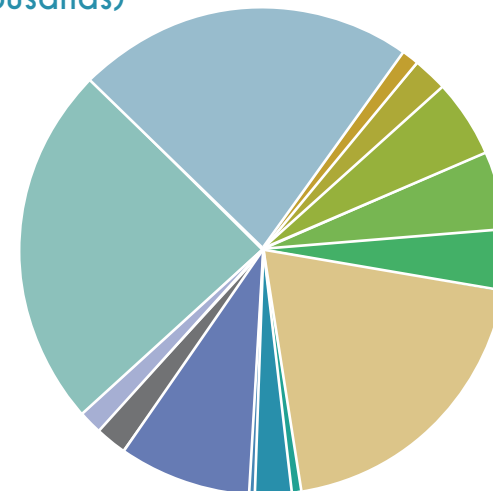
Accounts payable	\$113	\$335
Gift annuity obligations	\$356	\$374
Total liabilities	\$469	\$709
Net assets	\$6,499	\$6,529
TOTAL LIABILITIES & NET ASSETS	\$6,968	\$7,238

STATEMENT OF OPERATIONS & CHANGES IN NET ASSETS (in thousands)

Contributions	\$804	\$1,037
Investment income	-\$23	\$341
TOTAL	\$781	\$1,378
Administrative expenses	\$250	\$184
Change in actuarial obligation gift annuities	\$72	-\$98
TOTAL	\$322	\$86
Assets released from restrictions for Foundation projects	-\$489	-\$1,056
CHANGE IN NET ASSETS	-\$30	\$236
NET ASSETS AT BEGINNING OF YEAR	\$6,529	\$6,293
NET ASSETS AT END OF YEAR	\$6,499	\$6,529

2015 TOTAL DONATIONS

(in thousands)



Abbey Delray	\$7
Abbey Delray South	\$19
Beacon Hill	\$39
Claridge Court	\$39
Deerfield	\$32
Friendship Village of Bloomington	\$160
Friendship Village of South Hills	\$3
Grand Lodge at the Preserve	\$19
Harbour's Edge	\$1
Oak Trace	\$68
The Waterford	\$16
Village on the Green	\$8
Brede-Wilkins	\$196
Home Office	\$197
TOTAL	\$804



BAKE SALES BENEFITED HEALTH CENTER SPECIAL PROJECTS

In Delray Beach, Florida, many Abbey Delray South residents are talented bakers – and many of the Health Center’s residents and guests appreciate it.

The community hosted a bake sale each month, directing proceeds toward Health Center activities that aren’t included in the Center’s budget. Doshier Peter, Activities Director for the Health Center, said the sales, which fall under the community’s Caring Hands program, are an important and much-appreciated revenue source for her department.

“We allocate the funds to special projects, which often include activities that involve pets,” Doshier said. “The residents love animals, but with their health situations, it’s not possible for them to get out to a zoo or a farm or even a pet store. So we bring the animals to them.”

Doshier said she has arranged for ponies to visit the Health Center, an event that has proven the most popular, hands-down.

“We have a woman who brings four or five ponies, and the residents can talk to them and pet them,” she said. “We also had a lady bring farm animals. Puppies and kittens are always very popular too. Animals make the residents happy in a way that nothing else does.”

The Caring Hands program is administered by the Abbey Delray South Foundation Advisory Committee. That committee’s past chair, Dr. Elizabeth Force, said the bake sales were important to the residents who benefited from the proceeds and to those who did the baking.

“The bakers bought the ingredients, so they donated their money and their time,” Elizabeth said. “And these weren’t your average bake sales. Sometimes the residents baked general items, but sometimes they took orders. There were people who bought coffee cakes every month, for example. And the prices were wonderful. You couldn’t beat them.”

Elizabeth said the bake sales usually raised \$300 to \$500 per month. “The money was appreciated, and the residents who did the baking also felt they did something positive for the Health Center. It’s a win all around.”



SHARING THE UNENDING JOY OF READING



Always a voracious reader, Anne Gibb can't remember a time when she didn't have two or three books going simultaneously. She shares her love of books with her fellow residents at The Waterford in Juno Beach, Florida.

"It's impossible to be lonely when you're in the company of a good book," Anne said. "We have a great many readers here, but we also have some people who didn't start reading much before retirement. It's enjoyable to work with them because, for example, they haven't read the classics. Everything is new."

Anne purchases library materials with money donated from residents and the Lifespace Foundation. She's at the helm of the community's library and acts as its head volunteer. On most weekdays, she can be found in the library, shelving and rearranging and making literary recommendations. She has books for known bibliophiles as well as "those who just look as though they might appreciate a book to read."

The former headmistress of the prestigious Gulf Stream School in Gulf Stream, Florida, she also volunteers outside the community, serving on the school board of and volunteering for a nearby faith-based school.

"I always knew I'd remain active, and I always knew I'd continue to work with books and with children as long as I was able," Anne, 85, said. "We're fortunate to have a wonderful library here, and people are always eager to donate books as well as money to the library fund to purchase more materials."

Anne said although she has assigned hours in The Waterford's library, the role doesn't feel like a job.













"Even if I hadn't obligated myself to be here, I would most certainly be here every day," she said. "I can't imagine my desire to read, and to help others experience the joy of reading, will ever end."



You'll often find Anne Gibb in the library at The Waterford.

LIFESPACE COMMUNITIES ORGANIZED 2015 FOUNDATION ADVISORY COMMITTEES

Minnesota to Florida, Pennsylvania to Nebraska – Lifespace residents step forward to guide and support the Foundation’s work in their communities.

	ABBEY DELRAY	Millard Norman, Bernie Margolis, Carole Kokolakis, Stanley Radzkowski, Patricia Pembroke
	ABBEY DELRAY SOUTH	Elizabeth Force, Warren Morgan, David Blackman, Joanne Giovenco, Claire Aronowitz
	BEACON HILL	Lee Meyer, Ruth Fischer, Candy Bishop
	CLARIDGE COURT	Jane Burns, Jeanne Bleakley, Marion Goodwin, Mary Grant, Harold Hill, Betty Lull
	DEERFIELD	Glenis Nunn, Inger Anderson, Bill Straw, Tom McKenna
	FRIENDSHIP VILLAGE OF BLOOMINGTON	Carol Walter, Jo Grinnell, Warren Magnuson, Stan Bachman, Ed Bather, Nat Robbins
	FRIENDSHIP VILLAGE OF SOUTH HILLS	Allan Blacka, Sandra Dunlop, George Yatsko, Carl Gaddis
	GRAND LODGE AT THE PRESERVE	Jean Burg, Bill Carley, Betty Deaton, Irv Omtvedt, Marlo Burg
	HARBOUR’S EDGE	Carl Markel, Rosaline Sutton, Myron Strober, Fred Richardson
	OAK TRACE	Jim Wear, Dave Jones, Virginia Riordan, Char Gregory, Jim O’Donnell, John Biegert
	THE WATERFORD	Jim Callahan, Anne Gibb, M.J. Mitchell, Betty Richards, Ed Rodgers, Hattie Shorts
	VILLAGE ON THE GREEN	Sue Orth, Esther Vassar, Bud Czorny, Dee Balliett, Joan Cannon, Jean Walker



Village on the Green resident Esther Vassar.

THE
LIFESPACE
FOUNDATION

100 East Grand Avenue, Suite 200
Des Moines, Iowa 50309

515.288.5805
LifespaceCommunities.com



© 2016 Lifespace Communities, Inc.