Mission Statement

Create communities celebrating the lives of seniors.

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Cover: From left to right. Row 1 (seated): Peggy Sepanski, Fran Rossi, Marcie Shusis, Marlene Schalund, Betty Pearson.
Row 2 (standing): Betty Peaslee, Carol Keefe, Gloria Casper, Pat Nosal, Patti Wright, Doris Wilterding.
Row 3 (standing): Rena Gay, Doris Swanson and Alice Sommerville.
Right: Residents Marguerita and Eugene Jenzen enjoy life at Beacon Hill.
At Lifespace, we believe that every life and every place is full of potential. So we use our resources to help people and communities be their best.

That’s our social responsibility. That’s why we serve — on purpose.
Lifespace promises to provide the best possible care, going above and beyond to support our residents, their families and our team members. However, we don’t stop there.

Our residents and team members give back to their communities in purposeful, concerted ways that help us fulfill our mission to serve others. The work goes on quietly, often behind the scenes – but the impact is life-changing.

Volunteers at homeless shelters in DuPage County outside Chicago once had to take sheets and towels to their own homes to wash. That is, until Beacon Hill, a Lifespace community in Lombard, Illinois, volunteered to do the shelters’ laundry. Lifespace team members wash, dry and fold the laundry week in and week out, lightening the load for shelter volunteers.

We give our time, partner with local organizations, share meeting space with the community and provide benevolent care to our residents who have outlived their resources. These are just a few examples of stories found throughout our communities and this report.

We hope you enjoy these stories and permit them to serve as a testament of all we have done together to bring life to those in need of a helping hand, an understanding smile and a welcoming space.

Jodi Hirsch
Senior Vice President and General Counsel

Residents and team members at Beacon Hill fold laundry for a local homeless shelter.
“The work goes on quietly, often behind the scenes – but the impact is life-changing.”
Executive Summary

Social accountability measures how not-for-profit organizations put their tax-exempt dollars to work. At Lifespace, there is purpose behind every cent.

Lifespace’s commitment to social accountability means residents and team members are supported with life-changing resources. For instance, Lifespace residents do not need to worry about receiving quality care, even if they outlive their resources.

In 2016, Lifespace provided more than $46 million in charitable contributions to its residents and team members. Those benefits included:

**Resident Discounts from Fully Established Contractual Rates.** Lifespace supports Life Care residents by providing discounts from full contractual rates. In 2016, these discounts totaled $30.5 million.

**Direct Benevolence to Residents.** Lifespace offers benevolent care to residents who exhaust their resources through no fault of their own. In 2016, Lifespace contributed $1.4 million in direct benevolence to residents.

**Medicaid Adjustments.** The Medicaid program does not fully reimburse Lifespace for the cost of services provided to residents. In 2016, Lifespace contributed $1 million to make up this shortfall.

**Supplements to Medicare.** Lifespace makes adjustments when Medicare does not fully reimburse the company for the published price of services to residents. These contributions totaled $13.1 million in 2016.

**Foundation Projects.** In 2016, The Lifespace Foundation provided more than $380,000 for various projects.

Lifespace also extends its commitment beyond its walls and into the greater community. Through Lifespace’s Footprints program, team members spend hundreds of hours of paid time volunteering with not-for-profits of their choice. In 2016, team members served a total of 374 hours in their local communities, from picking up trash along highways to building homes with Habitat for Humanity.

All in all, Lifespace provided $545,930 in charitable contributions to the wider community in 2016.

This charitable activity helps Lifespace fulfill its purpose – to make life better for residents, their families, team members and the community at large.

Beacon Hill resident Doris Wilterding makes bears to donate to children in need.
“They have lived a lifetime making things better in the world, and they have no intention of stopping.”
Residents, Team Members Meet Local Need

When Marcie Shusis and her husband moved to Beacon Hill, she knew she needed a project.

“There are a lot of things to do here - exercise classes, games, art classes,” Shusis says. However, she wanted her life at the Lombard, Illinois, community to be shaped by a greater purpose, as it always had been.

After retiring from Illinois Bell Telephone Company in 1985 as a manager, Shusis got involved in the company’s retirees club, where she committed her time to the Hug-a-Bear Project, a volunteer program that provides hand-made bears to distraught children in difficult situations.

It didn’t take long for Shusis to have a conversation with Executive Director Blaire Goldstein about bringing the project to Beacon Hill. Goldstein and other team members eagerly volunteered to help find interested residents and secure space at Beacon Hill for the group to meet.

In two years, the group has stuffed close to 2,000 bears. Such committed volunteers represent the heart of Beacon Hill and embody Lifespace’s social accountability. As a not-for-profit organization focused on purposeful senior living, Lifespace’s social accountability comes naturally, says Jodi Hirsch, senior vice president and general counsel. “We share with the wider community, with others who need support for their grief, loss or medical challenges,” says Hirsch, who leads Lifespace’s social accountability efforts. “We become a resource for seniors, and that’s a great fulfillment of our mission.”

Lifespace residents and team members take the mission beyond the campuses — with the kind of innovation and enthusiasm Shusis and her neighbors display.

The project led residents to make Halloween bears for children who attend Boo Fest at Beacon Hill. Then there were Christmas bears for those who came for cookies with Santa. Another resident thought a local hospital could use some bears, nursing pillows and blankets. Yet another resident suggested reaching out to Phil’s Place, a support network for people undergoing chemotherapy.

Goldstein likes what she sees in outreach efforts like Hug-a-Bear. “Our residents do amazing things and see everything as a possibility,” she says. “They have lived a lifetime making things better in the world, and they have no intention of stopping.”

Marcie Shusis and other residents at Beacon Hill make bears for children in difficult situations through the Hug-a-Bear Project.
The intergenerational program is one of many initiatives that fulfill Lifespace’s commitment to serving the wider community. About 20 Abbey Delray South residents volunteer each year as mentors to a team of students in medicine, nursing and social work. The mentors participate in a series of three visits with the students.

Some of the mentors have participated for the entire six years of the program’s existence, in part because they enjoy the interaction with the young students, Bamdas says.

The program has a strong commitment from Lifespace team members as well, says Teresa Zorn, director of life enrichment and engagement at Abbey Delray South.

“Department directors are happy to take time out of their diligent schedules to speak in front of the students as well as give tours of our campus,” says Zorn, who assists with the program.

Students are often surprised to find the residents break the stereotypes of older adults, she says.

Medical student Benjamin Childs, for example, quickly learned that Abbey Delray South has an active fitness center and exercise program, which also creates important social connections between residents.

“They are seeing each other every day just like you would do with a family,” Childs says.

Mentor meetings are usually from one to three hours. But Hyman’s meetings often stretch to four hours as she clicks with the students. They exchange email addresses and keep in touch long after the program is over.

“I love it,” Hyman says. “I love showing them that there is life after 70.”
“I love showing them that there is life after 70.”
## Charitable Contributions

### Charitable Contributions to Residents and Team Members

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tr>
<td>Resident Discounts from Fully Established Contractual Rates</td>
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<tr>
<td>Direct Benevolence to Residents</td>
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<td>Medicaid Adjustments</td>
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<td>Supplements to Medicare</td>
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<td>Foundation Projects</td>
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<td><strong>TOTAL</strong></td>
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### Charitable Contributions to Broader Community

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<th>Community</th>
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<td>$17,554</td>
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<td>Abbey Delray South</td>
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<td>Beacon Hill</td>
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<td>Claridge Court</td>
<td>$33,501</td>
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<td>Deerfield Retirement Community</td>
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<tr>
<td>Friendship Village of Bloomington</td>
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<td>Friendship Village of South Hills</td>
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<tr>
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<tr>
<td>Harbour's Edge</td>
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<td>Oak Trace</td>
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<td>The Waterford</td>
<td>$56,028</td>
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<td>Village on the Green</td>
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<td>Lifespace Communities</td>
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<td><strong>Total</strong></td>
<td><strong>$545,930</strong></td>
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Charitable Contributions

Community Benefits Provided and Received

2016 Total Charitable Contributions: $46,511,816

Tax Benefits Received: $8,693,000
### Summary of Team Member Volunteer Hours

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<tr>
<th>COMMUNITY</th>
<th>NO. OF HOURS</th>
<th>VALUE OF CONTRIBUTIONS</th>
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<tbody>
<tr>
<td>Abbey Delray</td>
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<td>Friendship Village of South Hills</td>
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**TOTAL** 374  $10,274
Beacon Hill Serves Homeless

Every Wednesday morning, volunteers at homeless shelters in DuPage County, Illinois, collect sheets and towels that guests have used the night before. They load the linens into 10 or 11 large plastic bags and take them to Beacon Hill, a Lifespace community in Lombard. Beacon Hill team members then wash, dry and fold the laundry, holding it until a volunteer picks it up the following Saturday.

“That’s a big job when you consider that we have 50 beds at the shelter,” says Betsy Swinson, volunteer coordinator at Community Presbyterian Church of Lombard shelter, one of the shelters in the laundry service program.

The service is a way for Beacon Hill to contribute to the local community, says Teresa Novelli, Beacon Hill director of environmental services. It exemplifies Lifespace’s commitment to social accountability, she says.

Beacon Hill partnered 13 years ago with local not-for-profit DuPage Pads to do the weekly laundry for the shelters, which are sponsored by a rotating group of churches, Novelli says. The collaboration has been working smoothly ever since.

Before Beacon Hill stepped in, shelter volunteers divided up the linens and took them to their homes to wash. That was no easy task, Swinson says.

Beacon Hill team members, who have donated more than 600 hours to the service, gladly take on the extra work, Novelli says. “They really feel like they are giving something back to the community and that it’s very much appreciated,” she says.

In the future, Novelli plans to organize a clothing drive at Beacon Hill so that residents can donate to the shelters as winter approaches. The partnership with the shelters gives Lifespace the connections it needs to do even more to help, she says.

“It’s really essential for us to reach out to those who are in need in our community,” Novelli says. “It gives us a link to the community.”

Beacon Hill residents Gloria Casper, left, and Connie Arenberg fold laundry for a nearby homeless shelter.
“It’s really essential for us to reach out to those who are in need.”
“It’s our way of giving back to the community.”
When apartments are renovated at Grand Lodge at the Preserve, a Lifespace community in Lincoln, Nebraska, the old appliances such as stoves, refrigerators and dishwashers don’t end up rusting in landfills. Instead, they are donated to local nonprofits striving to help the community.

In 2016, Grand Lodge donated approximately 40 appliances to nonprofits. Recipients included the Lincoln-based Eco Stores, which diverts usable materials from landfills, and Habitat for Humanity, which helps build strength and self-reliance for those in need of affordable housing around the world.

Donating the appliances is a way for Lifespace to fulfill its commitment to social accountability, says Stan Heider, Grand Lodge’s director of community services.

“It’s our way of giving back to the community,” he says. “And it keeps the appliances out of the landfill.”

Lifespace campuses across the country are making similar donations of appliances and furniture, says Senior Vice President and General Counsel Jodi Hirsch, who leads Lifespace’s social accountability efforts. Last year, communities donated furniture and appliances valued at nearly $150,000, Hirsch says.

“It’s part of helping our neighbors,” she says. “It’s something that our residents and our team members feel very passionate about.”

Deerfield, a Lifespace community in Des Moines, Iowa, donated furniture in 2016 to Joppa, a local nonprofit that provides apartments for the homeless. The furniture was enough to partially furnish several apartments, says Bob Wirtz, Deerfield’s community services director.

Joppa hopes the partnership will continue for the long term, says the organization’s communications director, Melanie Guanci.

“The partnership with Deerfield allows Joppa to provide furniture for the newly housed, which includes people who were living under bridges and in tents,” Guanci says. “These are human beings and we think they deserve a bed to sleep in. Deerfield helps make that happen.”

Director of Community Services Stan Heider says it’s important for Grand Lodge at the Preserve to give back to the wider community.