

ALIGNED *to* SERVE

2018 FOUNDATION REPORT

THE
LIFESPACE
FOUNDATION





THE LIFESPACE FOUNDATION

DEDICATED TO MAKING A DIFFERENCE.

Service, benevolence and life enrichment are the touch points that find alignment within The Lifespace Foundation. Support from generous donors provides the basis for the organization's caring funds and the impact they have in helping residents and team members lead richer, more fulfilling lives.

T A B L E O F



C O N T E N T S

| Life Enrichment

4	The Lifespace Foundation Overview
5	Introducing “Benevolent Care – A Home for Life Fund”
6-7	Spiritual Needs Met by “Chaplain for Everybody”
8-9	Residents Fight Styrofoam and Win Big
10-11	Giving Thanks
12-13	Residents Band Together to Fund Scholarships
14-15	Financial Summary



THE LIFESPACE FOUNDATION OVERVIEW

AMY BRAINARD, DIRECTOR OF THE LIFESPACE FOUNDATION

In 2018, we sought to bring clarity to the purpose and function of The Lifespace Foundation by further educating residents, team members and the public about our mission. It's through these efforts that we settled upon the mantra, "Friends Helping Friends, Neighbors Helping Neighbors," to exemplify who we are and what we stand for.

As a not-for-profit, The Lifespace Foundation is a conduit for the people we serve to help each other. The backing we receive is for the exclusive use of supporting the health and welfare of our residents. This mission continued to resonate strongly in 2018, with our donor participation rate increasing significantly compared to the previous year.

The support made a difference in notable ways, often going above and beyond what's provided by operations and capital budgets. And most importantly, we continued to bring awareness about the need for benevolent care support, which provides financial support for residents who exhaust their financial resources through no fault of their own.

This is what "Friends Helping Friends, Neighbors Helping Neighbors" is all about, and we're excited to share some of the stories of how we positively impacted residents' lives. None of this would have been possible without the overwhelming generosity of our residents, team members and others, and we're extremely thankful for their support.

The Lifespace Foundation Mantra:

Friends Helping Friends,
Neighbors Helping Neighbors.

INTRODUCING “BENEVOLENT CARE – A HOME FOR LIFE FUND”

THE LIFESPACE FOUNDATION RENAMES SIGNATURE PROGRAM

As part of its 2018 efforts to reinforce its role and mission, The Lifespace Foundation renamed the Benevolent Care Fund, its signature program.

The fund, which provides financial support for residents who exhaust their financial resources through no fault of their own, is now called “Benevolent Care – A Home for Life Fund.” The new moniker is the brainchild

of resident Harold Mitchell of Friendship Village of Bloomington in Bloomington, Minnesota, who submitted it for consideration as part of an enterprise-wide search.

“Although ‘Benevolent Care Fund’ was meaningful and purposeful, we felt that we needed to rename it to give people a better understanding and sense of connection to what it’s all about,” said Lifespace Foundation Director Amy Brainard.

“We wanted to better portray what the fund means to the people it serves, and what better way to do that than by involving them in the process.”

All 12 Lifespace communities and the home office collectively gathered nearly 200 new name suggestions from residents and team members on behalf of The Foundation. The names were submitted to Brainard and her team for final deliberation, with “Benevolent Care – A Home for Life Fund” rising to the top.

Mitchell was ecstatic to learn that his submission was chosen. “The name actually came to me very naturally without a lot of thought,” he explained. “Everyone understands what a home is, and we certainly understand The Foundation’s focus on better living, so it covered the waterfront, so to speak. It’s very neat.”

This major contribution didn’t go unrewarded. The Foundation hosted a special celebration in Mitchell’s honor at Friendship Village of Bloomington as a show of gratitude, complete with a special cake to mark the beginning of this new chapter for the organization. “The Foundation showed that they really appreciated it. The recognition was quite the experience,” Mitchell said.

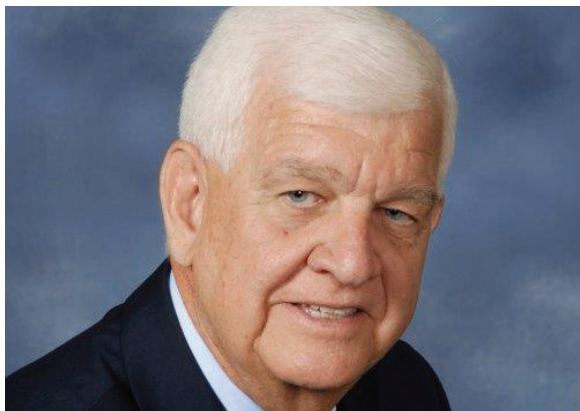


Friendship Village of Bloomington residents Harold and Bess Mitchell with Lifespace Foundation Director Amy Brainard at the celebration for the naming of the Benevolent Care – A Home for Life Fund.



SPIRITUAL NEEDS MET BY “CHAPLAIN FOR EVERYBODY”

SERVICES TO RESIDENTS PROMOTE INCLUSIVITY AND UNDERSTANDING



Spiritual needs come in all shapes and sizes. It requires chaplains at Lifespace communities to wear many hats to meet the spiritual care needs of all residents. Chaplain Ron Arflin, of both Abbey Delray and Abbey Delray South, exemplifies the all-encompassing approach.

“I’m the chaplain for everybody,” Arflin said. “That’s how I look at it. We provide everything from Passover meal for our Jewish residents, to Christian services, to spiritual care for those who are agnostic or have no faith position at all.”

Abbey Delray South resident Ellen Perlman said all have benefited from Arflin’s leadership.

“Ron was born into a life that centered around his Southern Baptist upbringing,” she said. “This very thoughtful man discovered that other voices in the room needed to be explored, and he has offered this exploration to us. We’ve all expanded our own lives because of Ron.”


Arflin, a 14-year Lifespace veteran, considers himself a bridge builder. His yearly budget, which doesn’t include his income, is based entirely on resident and team member donations to The Foundation. Support to the Spiritual Care Fund allows Lifespace community chaplains, like Arflin, to provide services ranging from holy observances to counseling in order to meet the spiritual care needs of all residents.

“Both communities have wonderful people from different backgrounds and faith traditions,” he said. “Understanding between faiths creates awareness of people’s similarities and lessens fear. We’ve been able to bridge gaps, bring people together, and increase understanding that I’m there for everyone.”

This perspective is the basis behind the fund name change meant to promote inclusivity among diverse spiritual beliefs at all Lifespace communities. Since the term “chaplaincy” is sometimes viewed as promoting only the Christian faith, Arflin and the leadership team at The Lifespace Foundation saw a need to better position the fund as something for people of all faiths or no faith at all. In 2018, the Chaplaincy Fund was renamed the Spiritual Care Fund to better promote the services offered to residents.

Chaplain Ron Arflin said the change has been welcomed by residents.

“There are numerous residents with spiritual needs who don’t necessarily subscribe to the tenets of one particular religious faith,” he said. “The name change has helped make them more aware of the importance of this fund to their spiritual growth, which is a key component of successful aging.”



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AND BRING PEOPLE TOGETHER.”

CHAPLAIN RON ARFLIN

“THIS IS A COMMUNITY WITH
A GROUP OF EXTREMELY
ENVIRONMENTALLY CONSCIOUS
RESIDENTS. WE’VE JOINED WITH OTHERS
IN THE KANSAS CITY AREA, FROM
BUSINESSES TO LOCAL GOVERNMENTS,
IN THE CONTINUED PUSH FOR A
GREENER METRO AND TO BE GOOD
STEWARDS OF OUR ENVIRONMENT.”

HOWARD MICK
*Claridge Court Resident &
The Foundation Advisory Committee Chair*

RESIDENTS FIGHT STYROFOAM AND WIN BIG

NEW MEAL CONTAINERS BENEFIT RESIDENT WELFARE

A certain frog once said it's not easy being green, but residents of Claridge Court would most likely challenge that assertion. A group of residents who compose the "Green Team" committee made a big push in 2018 to rid their community of Styrofoam containers once used to transport takeout meals.

In line with The Foundation's mission to support the health and welfare of residents, eliminating Styrofoam containers helps protect residents from chemicals that can be released when heated in a microwave, and it also reduces negative impacts on the environment from Styrofoam manufacturing.

The new takeout containers purchased with Foundation funds are providing other resident benefits, too. These include increased convenience and ease when taking meals back to their apartment homes and in reheating meals. For residents with mobility issues, the new containers can be the difference between enjoying a meal and having to work to enjoy a meal.

This effort was made possible due to collaboration with Lifespace culinary partner Thomas Cuisine Management and their commitment to support any future funding needs for this initiative. The change in takeout containers also plays into the larger role of Masterpiece Living® in the lives of residents. The program, adopted at all Lifespace communities, promotes informed, active seniors taking a serious look at all aspects of successful aging.

Resident Howard Mick, who chairs The Foundation Advisory Committee at Claridge Court, said the switch to new recyclable or compostable takeout containers has been a great success.



GIVING THANKS

AFTERNOON TEA DELIGHTS DONORS

In July 2018, Lifespace Foundation Director Amy Brainard was busy writing thank-you notes to donors when she stumbled upon a curious pattern. The Library Fund at The Waterford in Juno Beach, Florida, had received an outpouring of gifts from nearly 40 residents who contributed varying amounts around the same time, seemingly out of nowhere.


“It’s extraordinary to have that many gifts to the Library Fund, so I wanted to do something special to show gratitude for their generosity,” Brainard said, noting that the fund helps provide reading materials for residents at The Waterford. She contacted the community to brainstorm ideas, and they settled on hosting a special donors-only Afternoon Tea event.



In addition to personal invitations to all donors in 2018 to any Foundation fund at The Waterford, the event featured beautiful place settings and custom flower arrangements by a resident. Thomas Cuisine Management served savory desserts and hors d’oeuvres to accompany the hot beverages. This quintessential British pastime was by all accounts a big hit.



Waterford resident and librarian Anne Gibb helps lead the purchasing of library materials with money donated by residents through gifts to The Lifespace Foundation.



“ATTENDEES WERE SO EXCITED BY
THE RECOGNITION, ESPECIALLY
BECAUSE IT WAS UNEXPECTED.
DONORS ARE THE BACKBONE
OF EVERYTHING WE DO, SO IT’S
NICE TO GIVE BACK IN LITTLE
WAYS WHENEVER WE CAN.”

AMY BRAINARD
Director of The Lifespace Foundation

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ESIDENTS BAND TOGETHER TO FUND SCHOLARSHIPS

A GRAND EFFORT TO SUPPORT HIGHER EDUCATION

While all full-time Lifespace team members are eligible for tuition reimbursement from the company for educational opportunities, residents often rise to the occasion to support part-time team members through The Lifespace Foundation. There's no better example of that generosity than at Grand Lodge at the Preserve, where quick action was taken in 2018 to ensure team member scholarships would be funded for years to come.

"We planned to award six scholarships, and when our residents realized there wasn't enough money in our fund to pay out those scholarships, they sprang into action and raised nearly \$60,000 in about six weeks," said Lisa Henning, executive director of Grand Lodge.



LEFT TO RIGHT | Resident Keith Heckman, scholarship recipients Brian Meyer, Sydney Graff, Kelsey Wrightsman, Kaylee Prenosil, Holli Johnson, and Paige Eastman, Executive Director Lisa Henning, and resident Irv Omtvedt.

"Our residents on the Scholarship Committee made pledges as a way of showing other residents their level of commitment to this fund, and it was really inspiring to see so many residents working together to make sure the money was there," Henning said.

In addition, the Lifespace home office Foundation Advisory Committee was exceptionally impressed with the community's commitment and contributed an extra \$1,000 from the home office team member giving fund, adding to the good news.

For sustainability of scholarship funds, and to increase their impact in 2019 and beyond, award amounts have been doubled from previous years, now providing up to \$2,000 per recipient, but not to exceed 20% of the total available dollars in a community's scholarship fund. These procedural changes ensure the fund will continue to be available each year for those who apply and qualify.


Henning said the bond between residents and team members drives the scholarship effort, and the connection the community shares with the University of Nebraska-Lincoln (UNL) also plays a role.

"We have a lot of residents who are former faculty members at UNL," she said. "There's a great level of passion for education and the importance of pursuing higher learning, and I think that translates into the commitment we've seen with regard to scholarships."

Grand Lodge resident Irv Omtvedt, who's been involved with The Foundation Advisory Committee for several years, said it's the most popular way to support part-time team members.

"It's extremely important to support the pursuit of higher education, and our resident population understands that," he said. "It's very rewarding to have graduates stop back in to say thanks for the money we were able to donate to their future."

Thanks to their efforts, the fund is positioned to continue the scholarship program for several years, and Henning says she has no doubt the residents will continue their generosity for many decades to come.



“THE MISSION OF THE FOUNDATION
RESONATED STRONGLY IN 2018,
WITH OUR DONOR PARTICIPATION
RATE INCREASING SIGNIFICANTLY
OVER THE PREVIOUS YEAR.”

AMY BRAINARD
Director of The Lifespace Foundation

C CONTINUED GROWTH

SUSTAINS OUR ONGOING PROCESS

STATEMENT OF OPERATIONS | AND CHANGES IN NET ASSETS (IN THOUSANDS)

	FY 2018	FY 2017
Contributions	\$1,323	\$1,442
Investment income	(184)	564
TOTAL	1,139	2,006
Administrative expenses	514	381
Direct costs for Golf Classic	195	163
Change in actuarial obligation gift annuities	34	24
TOTAL	743	568
Assets released from restrictions for Foundation projects	(905)	(248)
Change in net assets	(509)	1,190
Net assets at beginning of year	6,407	5,217
NET ASSETS AT END OF YEAR	\$5,898	\$6,407

FOUNDATION FINANCIAL STATEMENTS | IN BALANCE SHEET (IN THOUSANDS)

ASSETS	FY 2018	FY 2017
Cash & investments	\$5,695	\$6,175
Other assets	455	820
TOTAL ASSETS	\$6,150	\$6,995
LIABILITIES & NET ASSETS		
Accounts payable	\$21	\$21
Gift annuity obligations	231	267
Unearned contributions	-	300
TOTAL LIABILITIES	252	588
NET ASSETS	5,898	6,407
TOTAL LIABILITIES & NET ASSETS	\$6,150	\$6,995

THE
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