



# ALIGNED *to* LEAD

2018 ANNUAL REPORT

LIFESPACE  
COMMUNITIES®





## KEEPING CULTURE, STRATEGY AND LEADERSHIP IN SYNC.

When the individual elements of an organization align, it can move forward more efficiently and better prepare to throttle up for growth. 2018 was a year of leaning into those we serve and with whom we partner, gaining deeper insights and elevating the level of commitment and communication. The rebuilding and reinvestment during 2018 strengthen this alignment and position us for even greater things going forward.

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# REALIZING THE BENEFITS OF STRONGER STRATEGIC ALIGNMENT.

A MESSAGE FROM LARRY SMITH | INTERIM PRESIDENT & CEO, AND CFO

It has been a privilege the last 16 years to help lead a respected organization that is committed to making a positive difference in the lives of seniors. I am humbled by the Board of Directors' confidence in me to act as interim president and CEO as they continue the search for new leadership.

As we reflect on another year, we are excited about steps we have taken to align our organization for success, encourage greater involvement from our residents and team members, and celebrate the diverse lives of those we serve. We deeply value the input we receive through our annual engagement surveys, and continue to explore methods to amplify the voices of our residents and team members. We saw strong participation in 2018, with key learnings in areas such as communication, career engagement and culinary services. We recognize improvements are always necessary and strongly believe these results will continue to help guide our decisions and shape the direction of our communities.

In an ongoing effort to enhance operations, we introduced PointClickCare® to all our campuses in 2018. This electronic health record system equips our team members with a comprehensive tool to more efficiently manage resident needs. We have incredibly passionate and talented health professionals, and this platform will reduce the time it takes for documentation, allowing our care providers to spend more face-to-face time with our residents.

We continued to build momentum with redevelopment initiatives. Many of our expansion and capital improvement projects made significant advances in 2018. Three of those projects – Abbey Delray, Friendship Village of South Hills, and Oak Trace (Phase I) – are expected to be completed in 2019.

Our team members remain driven by a purpose to serve with a focus on the well-being of residents. In 2017, Friendship Village of Bloomington became the first Lifespace community to be recognized as a Center for Successful Aging (CSA) by Masterpiece Living®. In 2018, two more of our communities, Beacon Hill and Friendship Village of South Hills, earned CSA certification for their programming dedicated to resident wellness and empowerment. We are confident more of our communities will join this prestigious list in 2019.

In this report, we shine a light on some of the accomplishments throughout the Lifespace family from the past year. I look forward to the year ahead and remain committed to continuing to improve this organization and leading it down a path of great success.

Larry Smith  
Interim President & CEO, and CFO



# ADDING THE VOICE OF RESIDENTS AS WE REALIGN FOR GROWTH.

A MESSAGE FROM LAVERNE EPP | 2018 BOARD CHAIR

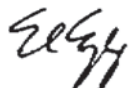
As chair of the Lifespace Board of Directors, I am privileged to be joined by a group with extensive experience in senior living, finance, hospitality and organizational leadership. Our role as a Board is to advance our mission as one of the nation's leading senior living organizations. I am pleased with steps we have taken during the past year and encouraged by our relentlessness to achieve the standards and goals we have set forth.

At its most fundamental level, our efforts directly focus on and support our residents, and rightly so. That is why I am proud of the announcement we made at our annual meeting last October. For the first time, a resident will occupy a position on the Lifespace Board of Directors in 2019. This individual will uniquely represent the interests of our 4,000-plus residents, and provide invaluable knowledge, experience and perspective on decisions that will impact those we serve. I am eager to personally welcome this deserving member, Mr. William Rich, a resident at The Waterford in Juno Beach, Florida.

In late 2018, we also began to revisit our strategic three-year plan. Stagnation is the antithesis for any healthy, thriving company, so it is vital we regularly evaluate and adjust our goals and targets. A new three-year cycle is beginning in 2019 and will build on the progress we have made to provide a comprehensive retirement experience. We have shifted some existing goals and made more subtle changes to others; the end result must be to continue to evolve our communities, empower our residents and team members, and celebrate the lives of those within the Lifespace family.

This past year we established the foundation for an exciting growth opportunity for Lifespace. In May 2018, we signed a letter of intent to explore an affiliation with Senior Quality Lifestyles Corporation, a Texas-based nonprofit senior living provider. As part of our early due diligence, we developed a Board-led transaction subcommittee. This group met regularly to help guide decisions during this important initial phase. It is gratifying to see so many people aligned with the success of our communities and the future of our organization.

There are many opportunities on the horizon, and 2019 will be a pivotal year for Lifespace to grow and expand our mission. I am confident our path is true, and remain immensely proud to serve this organization and have a connection with so many fine residents and professionals.



E. LaVerne Epp  
2018 Chair, Board of Directors



# THE LIFESPACE COMMUNITIES |

## POPULATION AND SUMMARY



### ABBHEY DELRAY

2000 Lowson Boulevard  
Delray Beach, FL 33445

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 342  
Assisted Living = 14  
Health Center = 100



### BEACON HILL

2400 South Finley Road  
Lombard, IL 60148

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 374  
Health Center = 110



### CLARIDGE COURT

8101 Mission Road  
Prairie Village, KS 66208

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 130  
Health Center = 45



### ABBHEY DELRAY SOUTH

1717 Homewood Boulevard  
Delray Beach, FL 33445

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 284  
Health Center = 90



### DEERFIELD

13731 Hickman Road  
Urbandale, IA 50323

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 156  
Residential Care = 26  
Assisted Living = 20  
Health Center = 30



### FRIENDSHIP VILLAGE OF BLOOMINGTON

8100 Highwood Drive  
Bloomington, MN 55438

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 295  
Assisted Living = 53  
Health Center = 66



TOTAL RESIDENTS = 4,016 | TOTAL TEAM MEMBERS = 2,669



### FRIENDSHIP VILLAGE OF SOUTH HILLS

1290 Boyce Road  
Upper St. Clair, PA 15241

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 291  
Health Center = 89



### HARBOUR'S EDGE

401 East Linton Boulevard  
Delray Beach, FL 33483

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 266  
Health Center = 54



### THE WATERFORD

601 Universe Boulevard  
Juno Beach, FL 33408

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 284  
Health Center = 60



### GRAND LODGE AT THE PRESERVE

4400 South 80th Street  
Lincoln, NE 68516

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 109  
Assisted Living = 10



### OAK TRACE

200 Village Drive  
Downers Grove, IL 60516

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 238  
Assisted Living = 53  
Health Center = 125



### VILLAGE ON THE GREEN

500 Village Place  
Longwood, FL 32779

#### **TOTAL RESIDENCES BY CARE LEVEL**

Residential Living = 242  
Health Center = 60

# ACTIVE AGING

## RECOGNITION WEEK HIGHLIGHTS YEARLONG FOCUS

A small stream of water splashes a resident from a water gun. A lively beat fills the air at a hip-hop dance lesson for another group of residents. Youthful glee is expressed by dozens of residents enjoying a roller-skating party. Across all Lifespace communities, residents and team members participated in various and extraordinary activities during Active Aging Week 2018.

Observed yearly since its inception in 2003, Active Aging Week aims to call attention to and celebrate positivity in aging. It showcases older adults' continued participation in society and highlights role models who lead the way.

At Oak Trace in Downers Grove, Illinois, residents loaded up water guns and filled balloons for a good old-fashioned squirt gun challenge and balloon toss.

"We wanted to give residents an experience that is out of the ordinary," said Paula Banno, Oak Trace's director of lifestyle. "One of the goals of Active Aging Week is to shatter expectations and perceptions of people who are 50 and older. It was a perfect reflection of that."

In Juno Beach, Florida, at The Waterford, residents proved there's more to seniors dancing than waltzes and two steps. A hip-hop dance instructor teamed up with the community to teach residents some modern moves. "This was a truly fun activity for everyone involved," said Executive Director Scott Nield. "Music's intergenerational appeal was the perfect Active Aging Week recipe."

It was all wheels at Claridge Court in Prairie Village, Kansas, where residents strapped on roller skates and appropriate safety gear for an afternoon at a local skating rink. The unconventional occasion was well-attended and gave the Claridge Court residents a chance to show off their skills.

"We used to call this move the Scottish," commented a resident out on the rink. "I used to do this years ago. This is so much fun!"



Oak Trace residents prepare for a water fight to celebrate Active Aging Week in September of 2018.



Claridge Court team members warm up at a nearby roller-skating rink before taking residents out for Active Aging Week.



Youthful glee abounds in Claridge Court residents at a roller-skating party with team members to celebrate Active Aging Week.

While Active Aging Week highlights seniors' vibrant lifestyle, it's something Lifespace communities strive to promote during the other 51 weeks of the year as well. In conjunction with Masterpiece Living, residents are provided with a support system that promotes successful aging in all areas of life.

Masterpiece Living® promotes and implements proven tools that help older adults live fully from a variety of standpoints, including physically, emotionally and vocationally.



# TWO COMMUNITIES EARN CERTIFICATION FOR SUCCESSFUL AGING

DISTINGUISHED LIST NOW INCLUDES THREE LIFESPACE COMMUNITIES



It's a distinction held by fewer than two dozen senior living communities nationwide, including two Lifespace communities that received the recognition in 2018. Friendship Village of South Hills and Beacon Hill joined fellow community Friendship Village of Bloomington to each be certified as a Center for Successful Aging (CSA). The honor is bestowed by Masterpiece Living®, an organization that partners with more than 80 senior living organizations nationwide in support of successful aging initiatives. Friendship Village of Bloomington received the honor in 2017.

*"Successful aging is ingrained in our community culture, and this certification is affirmation of the vibrant lifestyle we offer residents on a day-to-day basis," said Bryan Welty, executive director at Friendship Village of South Hills.*

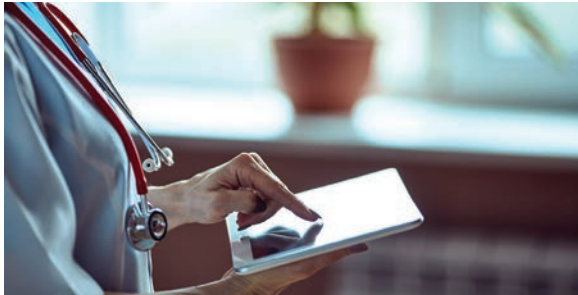
Bridgette Walshe, executive director at Beacon Hill, echoed Welty's sentiments.

*"Few communities hold this certification, so it's truly a testament to the vibrant culture and environment we've sustained over the years," she said. "We see the milestone as a sign of even bigger things to come."*



# TECHNOLOGY ELEVATES SERVICES

NEW SYSTEMS TO BENEFIT OPERATIONS, RESIDENT EXPERIENCE



Through new products, programs and technology, Lifespace Communities continues to explore ways to elevate services and efficiencies to meet the needs and expectations of residents.

In 2018, all 12 Lifespace communities introduced PointClickCare®, an electronic health record (EHR) system. The cloud-based platform provides a single record for each resident across all levels of living, allowing for greater coordination and collaboration by community health professionals.

“The new EHR system makes it so much easier for both residents and team members to navigate the caregiving process,” said Nancy Montalvo, director of nursing services at Beacon Hill in Lombard, Illinois. “Residents benefit greatly because of the extra care and attention we are able to provide.”

“In our digital age, this technology is a must,” said Dr. Sara Hamm, senior vice president of successful aging & health services at Lifespace. “How our teams access and share sensitive and timely information is crucial to the well-being of those we serve. PointClickCare allows team members to see real-time progress of residents and devote more quality time to them, which is what residents expect and our team members prefer.”

The platform includes a number of features that support a holistic approach to care and treatment, including:

- **Care Delivery Management** – Basic assessments and care plans, medication and nutrition management tools, and encrypted communication applications.
- **Quality and Compliance** – Risk management and incident reporting tools to help address critical issues quickly and efficiently.
- **Financial Management** – Ensures accurate admissions documentation and efficient billing processes.

Additionally, last fall all 12 communities implemented NetSuite, a comprehensive accounting software. Another cloud-based system, NetSuite

provides financial teams a better tool to keep communities fiscally compliant and transparent.

“NetSuite has given us stronger internal controls and brought greater efficiencies to our teams,” said Heidi Leavengood, vice president of accounting at Lifespace Communities.

The software, which automates many checks and balances previously done manually, reduces the risk of error, provides more quality reporting, and helps the accuracy of important financial statements.

*“Greater efficiencies free up valuable time for team members to focus on important operational needs at each community and the resident experience,” Leavengood said.*



As residents like Jay Cawley of Grand Lodge at the Preserve in Lincoln, Nebraska, continue to embrace new technology, so does the Lifespace organization to improve operations and resident services.



# ENGAGEMENT DRIVES DECISIONS

## RESIDENT AND TEAM MEMBER SURVEY HIGHLIGHTS



**TOP IMAGE** | Ann Walsh, senior vice president of operations at Lifespace Communities, interacts with Village on the Green resident Stan Goldstein at a community event.



**BOTTOM IMAGE** | Resident Rachel Gold and Social Services Director Nicole Milsted mingle at an event held at Abbey Delray South.

Vital windows into the evolution of the Lifespace organization are annual resident and team member engagement surveys. These surveys provide valuable insight into the satisfaction, expectations and perceptions of those who live and work at Lifespace communities. This feedback confirms what's working well, areas for improvement, and what to prioritize in the coming year.

In 2018, overall participation remained high, with 93% of team members responding and 80% of residents. Here is a snapshot of feedback received:

- 92% of team members had a positive perception of Lifespace's mission, while 93% believed their job is important in helping their community achieve this mission.
- Team members' overall engagement score, which measures the level of career engagement at Lifespace, was 72%, which was a 4% improvement over 2017.
- 92% of residents had a positive perception of Lifespace's support services, such as transportation and security.
- Residents indicated an 89% approval rating for team members, and expressed they felt respected and catered to based on personal preferences.

While Lifespace continues to experience improvements in recent survey results, opportunities always exist to elevate programs, services and community lifestyle even further. Making the necessary changes will continue to be a primary focus in 2019 and beyond.





# ADVANCING CARE

## LIFESPACE INVESTS IN COMPREHENSIVE DEMENTIA CARE TRAINING

According to the Alzheimer's Association, 5.7 million Americans are living with Alzheimer's disease, and by 2050, this number is expected to increase to nearly 14 million.

In recognition of the devastating impact Alzheimer's disease and other forms of dementia have on individuals and their families, Lifespace has invested in comprehensive training for team members across all 12 communities to better support older adults living with this diagnosis, as well as the family members impacted by this tragic disease.

In 2018, more than 300 team members throughout the Lifespace organization participated in Alzheimer's Disease and Dementia Care Training seminars. This full-day, interactive curriculum offered through the National Council of Certified Dementia Practitioners (NCCDP) guides participants through more than 11 modules of dementia care and management, such as physiology of the disease, behavior, emotional changes, care, communication and family support.

"This training recognizes our commitment to education, and empowers our team members to provide high-quality care and services to those affected by a disease that has truly become a national epidemic," said Dr. Sara Hamm, senior vice president of successful aging & health services at Lifespace. "Our philosophy focuses on retaining individual strengths and capabilities, rather than focusing on loss and disability."

In late 2017, five community leaders became Certified Alzheimer's Disease and Dementia Care Trainers, allowing them to lead training curriculums provided by the NCCDP on Lifespace campuses. Of the 300 team members trained in 2018, more than half pursued additional qualifications to become Certified Dementia Practitioners.

*"We believe in focusing on the rich histories of our residents, and possibilities of what individuals can do, so that their inner beauty, value, dignity and passions will not be lost, despite any limitations they may have," said Josie Enriquez, regional director of health services.*

In 2019, three communities – Oak Trace, Friendship Village of South Hills and Abbey Delray – will complete significant redevelopments. Included in these projects are comprehensive assisted living and memory care programs. Once finished, seven of 12 Lifespace communities will offer dedicated services for residents diagnosed with Alzheimer's disease and other forms of dementia.

"Our goal is to offer this important training to community leaders and frontline team members, including nursing, housekeeping, maintenance and our culinary teams," added Hamm. "In addition to the NCCDP Alzheimer's Disease and Dementia Care training curriculum, we also offer additional comprehensive training on our Lifespace memory care programming standards in all communities that operate these specialty programs."

"I am so delighted that we have also had several retired nurses and physicians who live at our communities attend some of our seminars, and we'd love to extend this opportunity to other interested residents."





# LIFESPACE TEAM MEMBER NATIONALLY RECOGNIZED

## KATELYN REICHOW NAMED CNA OF THE YEAR

Katelyn Reichow, a certified nursing assistant (CNA) at Friendship Village of Bloomington in Bloomington, Minnesota, was named the 2018 CNA of the Year by the National Council of Certified Dementia Practitioners (NCCDP). Reichow was chosen from hundreds of nominees nationwide to earn the award. Representatives from the NCCDP presented Reichow with her award at a surprise ceremony in December.

“We’re incredibly proud and honored to work with someone as caring and compassionate as Katelyn,” said Jennifer Bever, administrator at Friendship Village, who nominated Reichow.

Reichow has worked in memory care at Friendship Village for four years, where she’s a caregiver to residents with Alzheimer’s and other forms of dementia. She is one of the 300 Lifespace team members who completed NCCDP dementia care training in 2018, and she is currently pursuing a registered nursing degree.

“Katelyn’s award speaks volumes about our team’s commitment to quality care for our residents,” said David Miller, executive director at Friendship Village.



Katelyn Reichow (center left) with coworkers and representatives from the National Council of Certified Dementia Practitioners.



# HEALTHY LIVING

## INFECTION CONTROL MEASURES MANAGE RISK

The U.S. National Library of Medicine reports that older adults are more prone to infections due to natural, age-related changes to the immune system.

Lifespace Communities demonstrated vigilance about this fact by administering rigorous infection control and prevention measures in 2018 to provide additional safeguards against communicable diseases.

Stacy Strait, RN, MSN, clinical nurse specialist at Oak Trace in Downers Grove, Illinois, said the passion throughout the Lifespace organization for protecting and nurturing health can't be overstated. With her dedication and commitment, Strait earned the Antibiotic Stewardship Specialist Certification (AS-BC™) through NADONA, the National Association of Directors of Nursing Administration in Long Term Care.

"Infection prevention training is crucial for everyone," she said. "Some professionals adhere to the belief that you should always prescribe antibiotics, but that simply isn't the case." Strait's efforts to promote antibiotic stewardship and rigorous hand hygiene by

residents and team members resulted in a significant reduction in two of the most common infections in health care settings nationwide. Lifespace started its own antibiotic stewardship program in 2018 similar to NADONA's.

The program launched in accordance with regulations set forth by the Centers for Disease Control and Prevention and the Centers for Medicare & Medicaid Services in late 2017. Since that time, a number of other Lifespace registered nurses received their certifications as Infection Preventionists.


Lifespace team members in every department undergo training on infection control best practices throughout their careers. Residents are also frequently reeducated on the signs and symptoms of various illnesses, hand hygiene and disease prevention, and the appropriate steps to take when experiencing symptoms of an active infection.

"We also assembled a new infection control clinical advisory committee in 2018, composed of several registered nurses from our Lifespace health centers," noted Dr. Sara Hamm, senior vice president of successful aging & health services at Lifespace. "This committee developed a comprehensive Infection Prevention and Control Manual that will be introduced to all Lifespace health centers in early 2019."

Additionally, Lifespace conducts a robust annual immunization campaign during late summer and early fall to combat influenza and pneumonia. Not only does the organization stress the importance of immunization, but it also offers vaccines at all sites for both residents and team members.







“KNOWLEDGE IS POWER. FEW THINGS ARE AS IMPORTANT AS PROTECTING THE PEOPLE YOU CARE ABOUT. IT’S REWARDING TO SEE SUCH POSITIVE OUTCOMES FROM THE NEW CLINICAL ADVISORY INITIATIVE.”

**DR. SARA HAMM**

*Lifespace Senior Vice President of  
Successful Aging & Health Services*

# R EDEVELOPMENTS & EXPANSIONS | PROGRESS AND PLANNED IN 2018

## PROGRESS



ABBEY DELRAY

INVESTMENT: **\$38 million** | PLANNED COMPLETION: **Late 2019**

- New assisted living and memory care building
- New fitness center and spa
- New performing arts center
- Renovated residential living dining with display cooking



FRIENDSHIP VILLAGE OF SOUTH HILLS

INVESTMENT: **\$40 million** | PLANNED COMPLETION: **Mid-2019**

- New assisted living and memory care building with supporting amenities and wellness spaces



## PROGRESS



### OAK TRACE

INVESTMENT: **\$174 million**

#### PHASE 1

| PLANNED COMPLETION: **Spring 2019**

- New health center with assisted living, memory care and skilled nursing residences
- New physical and occupational therapy center
- Dialysis clinic and support spaces

#### PHASE 2

| PLANNED COMPLETION: **Late-2021**

- New apartments for residential living
- New dining venues
- New common areas and social spaces
- New courtyard park

## PLANNED

### FRIENDSHIP VILLAGE OF BLOOMINGTON

INVESTMENT: **\$114 million**

PLANNED COMPLETION: **TBD**

- New health center with assisted living, memory care and skilled nursing residences
- New physical therapy and occupational therapy
- Additional wellness and support spaces
- New building for residential living featuring a variety of apartment floor plans and amenities

### VILLAGE ON THE GREEN

INVESTMENT: **\$56 million**

PLANNED COMPLETION: **TBD**

- New health center with assisted living, memory care and skilled nursing residences
- New physical and occupational therapy center
- New residential living villas
- Renovated clubhouse and common area
- New dining options



LIFESPACE IS COMMITTED TO  
REINVESTING IN COMMUNITIES  
TO ENHANCE THE RESIDENT  
EXPERIENCE AND ADVANCE  
THE ORGANIZATION'S MISSION.



## CONSOLIDATED BALANCE SHEET |

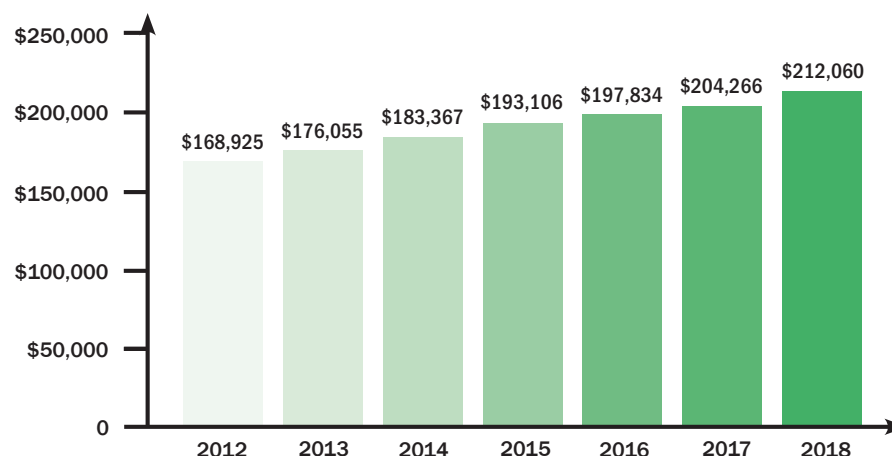
BALANCE SHEET  
(IN THOUSANDS)

ASSETS	FY 2018	FY 2017
Cash & cash equivalents, investments in trading portfolio, excluding those whose use is limited	\$131,393	\$142,662
Assets whose use is limited	202,586	105,617
Accounts & other receivables	15,543	16,073
Inventories, prepaid insurance & other	5,454	5,912
Property & equipment, net	600,248	513,489
Goodwill	52,823	52,823
Deferred expenses	622	239
Intangible assets	2,755	2,755
<b>Total Assets</b>	<b>\$1,011,424</b>	<b>\$839,570</b>
<b>LIABILITIES &amp; NET ASSETS</b>	<b>FY 2018</b>	<b>FY 2017</b>
Accounts payable, deposits & accrued liabilities	65,732	42,013
Entrance fee & health center refunds	47,995	43,152
Notes & bonds payable	423,026	260,145
Obligation under capital lease	1,732	1,765
Deferred entrance fees	166,852	164,379
Refundable entrance fees	417,193	417,682
Estimated obligation to provide future services	1,194	2,656
In excess of amounts received or to be received	(112,300)	(92,222)
<b>Total Liabilities &amp; Net Assets</b>	<b>\$1,011,424</b>	<b>\$839,570</b>

## BOTTOM LINE

OPERATING REVENUE (CASH)	FY 2018	FY 2017
Monthly fees	\$129,047	\$125,175
Ancillary & other services	83,013	79,091
<b>Total Operating Revenue (Cash)</b>	<b>\$212,060</b>	<b>\$204,266</b>
<b>OPERATING EXPENSES (CASH)</b>	<b>FY 2018</b>	<b>FY 2017</b>
Team member costs	\$117,544	\$113,875
Ancillary & other services	12,031	11,678
Other	80,501	71,483
<b>Total Operating Expenses (Cash)</b>	<b>\$210,076</b>	<b>\$197,036</b>
<b>Margin</b>	<b>\$1,984</b>	<b>\$7,230</b>

## REVENUE | EXCLUDING INVESTMENT INCOME AND ENTRANCE FEE AMORTIZATION







# THE RIGHT ALIGNMENT TO PAY IT FORWARD.

| Volunteerism, social accountability, service and outreach exemplify the Lifespace commitment to celebrating the lives of seniors and earning the trust of partners, team members, residents and the larger communities we serve. Making a difference for those who are most deserving has always been a priority for Lifespace.



# SOCIAL ACCOUNTABILITY OVERVIEW

ALIGNED TO GIVE BACK


Each year, we are deeply inspired by the generosity within the organization. 2018 was no different. Lifespace team members and residents continued to contribute to the greater good in significant numbers, whether through volunteerism or donations to worthy causes. And Lifespace was right by their side, offering support and resources whenever needed for philanthropic efforts.

Lifespace charitable contributions hit a new high, totaling \$821,550. This figure, which includes generous contributions from all 12 communities and the home office, was a 15% increase from the previous year. An additional \$20,706 was raised for the Alzheimer's Association to support the fight against Alzheimer's disease and other forms of dementia that overwhelmingly affect seniors. Lifespace communities also worked with and contributed to 23 food organizations in various regions to help feed the hungry.

Furthermore, Lifespace communities and the home office donated valuable building space for outside organizations to host a total of 1,572 events throughout the year. The initial 2018 event goal was 888, and Lifespace is incredibly proud to have surpassed it by such a wide margin. Last but not least, more than \$17 million was allotted toward resident well-being, from covering unreimbursed Medicare and Medicaid costs to offering discount rates to residents in need.


Giving is truly at the heart of Lifespace as an organization, and these examples showcase the extent of that generosity. There's more where that came from, and this report highlights additional stories of how Lifespace helped promote the welfare of others in 2018.





“THE LIFESPACE SOCIAL  
ACCOUNTABILITY PROGRAM  
PROVIDES A MEANS FOR ALL  
OF US TO HELP ‘REPAIR OUR  
WORLD’ IN A VARIETY OF  
MEANINGFUL WAYS.”

**ANN WALSH**  
*Lifespace Senior  
Vice President of Operations*



"I'M HUMBLLED TO WORK AMONG  
TEAM MEMBERS AND RESIDENTS  
WHO HAVE SUCH A HIGH REGARD  
FOR EVERYONE'S WELL-BEING.  
SERVICE TO OTHERS IS TRULY AT  
THE HEART OF WHO THEY ARE  
AS PEOPLE, WHO WE ARE AS A  
RETIREMENT COMMUNITY, AND IT'S A  
CORE VALUE OF OUR HOME OFFICE."

**JAMES ROBINSON**  
*Deerfield Executive Director*

# SPECIAL EFFORTS TO HELP THOSE IN NEED

## TEAM MEMBERS, RESIDENTS COMPETE TO CONTRIBUTE

Special Olympics Iowa helps more than 14,000 individuals with intellectual disabilities build self-confidence and self-esteem through sports training and competition. In 2018, Deerfield Retirement Community in Urbandale, Iowa, helped these individuals realize their dreams in multiple ways with some of their own athleticism and determination.

**“Philanthropy and community outreach hold a special place in the hearts of our team members and residents,” said Jeanne Altman, Deerfield’s director of lifestyle.**

At an annual summer fundraiser for Special Olympics Iowa, Deerfield team members took on the extraordinary Plane Pull challenge of tugging an 80,000-pound airplane by rope across a distance of 12 feet. As a nod to one of its honorary members, 96-year-old Deerfield resident Cy Kirk, the team went by the name “Hangover Hattie.” The name derived from the plane Kirk flew as a pilot in World War II, and that plane was similar to the one the team would have to pull by hand for the fundraising competition.

“Many Deerfield residents were there to cheer us on and support the cause,” said Bob Wirtz, director of community services at Deerfield, who admitted the team was initially worried they wouldn’t be able to pull off the feat.

With grit and determination, they accomplished the Plane Pull. Even more gratifying to the team was the \$85,000 raised for Special Olympics Iowa, much of that through the \$500 participation fee contributed by each team at the event.

In the days following that event, another group from Deerfield started two months of training for its next charitable effort to benefit Special Olympics Iowa and other local charities. More than 60 residents and a group of team members teamed up for the IMT Des Moines Marathon and the MercyOne 5-Mile Run & 1-Mile Walk event. It was the first time in the event’s history that a team representing a senior living community competed.

“It was a challenge, and whenever there’s a physical challenge that feels like I’m physically able to do it, I want to try it,” said Loretta Ware, a Deerfield resident. “Besides the physical aspect, I think the camaraderie of the whole group doing it together unites you and makes you feel more needed too.”

To build the camaraderie and fuel the training, Deerfield purchased Fitbits for the team of 64 residents. The smartwatches help track physical activity and various healthy living practices. With watches strapped and shoes laced, the team



**LEFT TO RIGHT** | Residents Art Cross and Cy Kirk join Deerfield Executive Director James Robinson and other team members at the Special Olympics Iowa Plane Pull.

practiced indoors at Deerfield and outdoors on walking trails surrounding Deerfield, accounting for dozens of hours in all per resident to prep for race day.

With training complete, race day arrived, and the team conquered, with more than a dozen completing the full 5 miles. “It’s awesome. I never expected this big a crowd or this much excitement,” said Ware.

In all, Deerfield contributed more than \$1,500 to the cause through registration fees for the event.



# FUN, FUNDRAISING AND CAMARADERIE

## EFFORTS TO FIGHT ALZHEIMER'S DISEASE AND CANCER



Abbey Delray team members Antonieta Caicedo and Mark Trepanier after the 2018 Relay For Life Century Ride.

Raising money for charitable causes comes in many forms across Lifespace communities. In some cases, social accountability is where the rubber meets the road, whether it's the sole of a shoe or the tire of a bicycle.

In 2018, a total of nine communities participated in their local Walk to End Alzheimer's or other fundraisers for the Alzheimer's Association. The collective value of contributions from Lifespace communities to the Alzheimer's Association totaled \$20,706. In addition to walking for a good cause, another extraordinary effort in 2018 involved cycling.

On almost any given morning, you'll find Abbey Delray resident Leonard Cline on a bike ride in or around

the community in Delray Beach, Florida. Whether it's 25 or 50 miles, Cline says he enjoys the mental and physical benefits from the activity.

"I guess you can say I've become addicted to exercise at this stage of my life," said Cline.

For his 71st birthday, he set a goal to complete the Century Ride, a 100-mile trek for the annual Relay For Life fundraiser for the American Cancer Society. He prepared for months, and inspired Abbey Delray to support the cause and team members to join him in the ride.



Abbey Delray resident Leonard Cline practicing for the 100-mile bike ride to benefit the American Cancer Society.

*"I really felt the camaraderie of the Abbey Delray community," Cline said of the 11-hour course. "It turned into a cheering squad as I rode."*

Executive Director Mark Trepanier and Human Resources Director Antonieta Caicedo completed their own 100-mile rides alongside Cline. In 2017, the Abbey Delray team raised \$1,500 for the cause to fight cancer. In 2018, the camaraderie peddled to new heights. Lifespace sister communities in Delray Beach, Harbour's Edge and Abbey Delray South, joined the effort to raise money for the team. All three combined raised \$10,000 for the American Cancer Society's Relay For Life.

*"Leonard Cline is such an inspiration to us at our community," said Trepanier. "He achieves goals he sets, and that's something we strive for with all our residents. It's been an honor to ride next to him and raise money for such an important cause. We look forward to continuing it for years to come."*

# HELPING WORTHY CAUSES

## DONATIONS TO PETS AND PET OWNERS IN NEED

*"We're committed to giving back to the greater community and efforts that connect team members, residents and neighbors to worthy causes," said Blaire Goldstein, executive director of Oak Trace. "This donation is one of the many outreach program offerings at Oak Trace that promote charitable giving."*



**TOP IMAGE** | The doghouse at Oak Trace to collect donations for PAWS Chicago.

**BOTTOM IMAGE** | Oak Trace team members and residents interact with PAWS Chicago staff (and pets) at the donation and drop-off event.

The sounds of power saws and sanders echoed from the Oak Trace woodshop. Inside, resident Richard Haffner was building a doghouse that would be a focal point for a community-wide effort to help pets and pet owners in need in the Chicago area.

It all started after Oak Trace Health Center Administrator Michelle Hart-Carlson and team members read a story about area seniors forgoing some meals for themselves in order to provide for their pets. They reached out to PAWS Chicago, a nonprofit animal shelter that collects donations of pet food, treats, and other supplies for pet owners in need and animals that sit in its shelters.

**In a matter of weeks, team members and residents filled the doghouse many times over with needed supplies. In all, Oak Trace collected 200 pounds of pet food and supplies, as well as a cash donation to give to the organization.**

"PAWS Chicago is a worthy organization, and their programs help those who need assistance caring for their pets and pets that don't have a home," Hart-Carlson said. "As a pet-friendly community here at Oak Trace, we know the importance of seniors owning a pet."

Studies have shown pets help older adults stay physically active, maintain social connections and have a more positive outlook on life. All Lifespace communities are pet-friendly.

Beyond one big drop-off of supplies and donations to PAWS Chicago, Oak Trace continued collecting items throughout the year, and opened its doors to anyone in the surrounding area to stop by and drop off donations.







# NOURISHING THE LOCAL COMMUNITY

## DONATIONS TO FOOD ORGANIZATIONS

Among the many charitable culinary initiatives undertaken by Village on the Green in 2018, its partnership with Second Harvest Food Bank of Central Florida ranks at the top. The community, located in Longwood, Florida, donated 3,905 pounds of food worth more than \$20,000 to the nonprofit organization, which serves the hunger-stricken in six area counties: Brevard, Lake, Orange, Osceola, Seminole and Volusia.

“We understand that there are many people who don’t have the same privileges we do in life,” said Angel Rivera, executive chef at Village on the Green. “Many don’t even know where they’ll get their daily meals from. We feel that it’s important to lift them up when we can, and Second Harvest is a great partner because of the reach it has locally.”


Beyond providing meals to the underprivileged, Second Harvest also offers a free culinary training program for adults who are economically challenged. The initiative gives students the hands-on experience necessary to successfully pursue careers within the food industry. In fact, three of Village on the Green’s newest culinary team members were graduates. The group started off as apprentices under Rivera before earning hired positions at the community.

In total, Village on the Green contributed to five food organizations in the Orlando area in 2018. Across all Litespace communities and the home office, the organization contributed to a total of 23 food organizations to help feed people in need.




Village on the Green Executive Chef Angel Rivera (left) helps lead the community's donations to local food organizations.





“GIVE A PERSON A FISH AND YOU FEED THEM FOR A DAY, BUT TEACH THEM HOW TO FISH AND YOU FEED THEM FOR A LIFETIME. THE TRAINING PROGRAM OPENS A GREAT AVENUE FOR THE FUTURE, AND WE’RE GRATEFUL TO BE A PART OF THAT.”

**ANGEL RIVERA**  
*Village on the Green Executive Chef*



THE LIFESPACE COMMITMENT  
TO SOCIAL ACCOUNTABILITY  
BEGINS WITH OUR FAMILY OF  
RESIDENTS AND TEAM MEMBERS.  
WE ARE BETTER ALIGNED TO  
CREATE A LASTING IMPACT FOR  
THEM, AND THE 2018 TREND  
BEARS THAT OUT.

## SOCIAL ACCOUNTABILITY CHARITABLE CONTRIBUTIONS

BENEFITING THE BROADER COMMUNITY

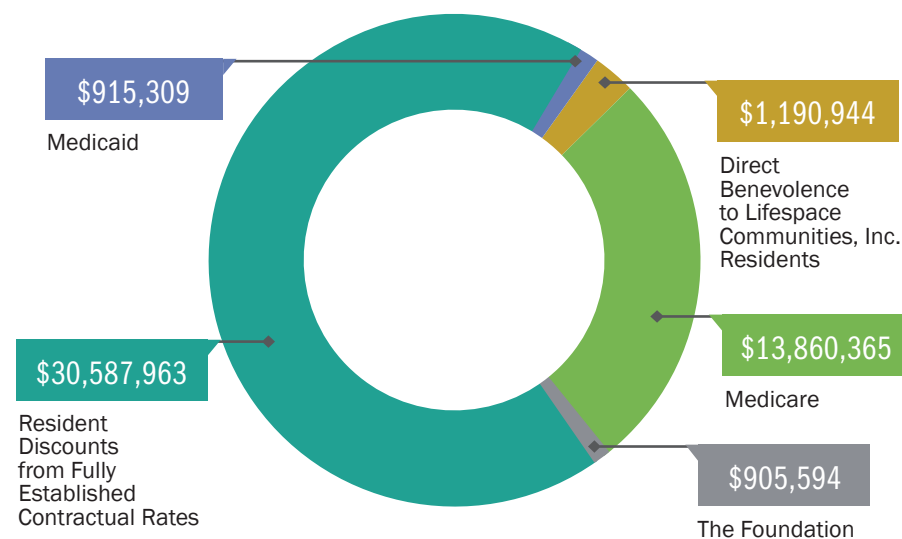
Abbey Delray	9,971
Abbey Delray South	47,801
Beacon Hill	94,473
Claridge Court	26,810
Deerfield	68,127
Friendship Village of Bloomington	16,570
Friendship Village of South Hills	38,215
Grand Lodge at the Preserve	91,950
Harbour's Edge	16,388
Oak Trace	210,956
The Waterford	75,080
Village on the Green	115,233
Home Office	9,976
<b>Total</b>	<b>\$821,550</b>



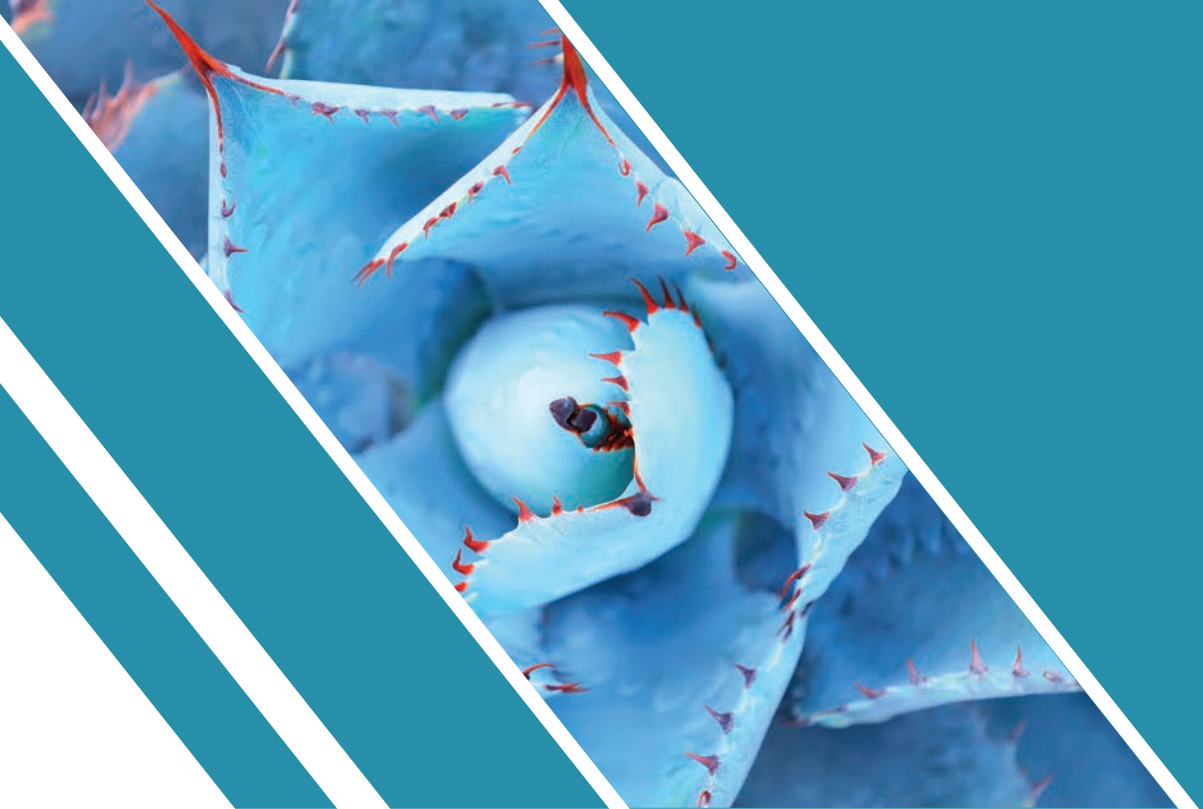
## CONTRIBUTIONS

TO LIFESPACE COMMUNITIES RESIDENTS  
AND TEAM MEMBERS

Resident Discounts from Fully Established Contractual Rates	30,587,963
Direct Benevolence to Lifespace Communities, Inc. Residents	1,190,944
Medicaid	915,309
Medicare	13,860,365
The Foundation	905,594
<b>Total</b>	<b>\$47,460,175</b>







# DEDICATED. DRIVEN TO LEAD.

| Professionalism and commitment to service drive our executive management team. Their ideas, talents and efforts help define the Lifespace culture and inspire all our team members to greater heights.

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# LIFESPACE

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