Rappahannock Westminster-Canterbury Foundation

2014 - 2015 ANNUAL REPORT



Message from the President



Rappahannock Westminster-Canterbury celebrates its thirtieth anniversary this year, and as I reflect upon the sixteen years I have been with the community, I am drawn with great amazement to the people involved with RWC over that time. This Annual Report is dedicated to our thirty years of service and most importantly to the people who are part of the RWC family.

Residents, staff, families, trustees, vendors, contractors, service providers, benefactors, volunteers, leaders, guests, and friends—all of these describe the wonderful people crucial to the success of RWC.

We truly have been blessed by a wonderful array of people over thirty years. To start, we are thankful for the people who conceptualized and advocated for a retirement community in the Northern Neck. They saw a need in their community that could be met by RWC and brought it to life. Others saw a need to provide for neighbors and friends who could otherwise not make RWC home and formed the Foundation before the doors of RWC opened to the first resident. Benefactors continue to provide for fellowship assistance, special projects, scholarships, programming and buildings that are crucial to our services. People live, work, care, lead and contribute here sustaining our mission and preparing for growth and future opportunities. People come, share, impart, encourage and motivate our residents and our greater community. Our residents come from all places; represent vast life, professional, and personal experiences; engage in numerous volunteer and contributory pursuits; and provide an endless fountain of encouragement for those called to serve at RWC.

If you are reading this report, you are among the people so vital to RWC over the past thirty years and so essential to our future. For your contributions in whatever manner, we are grateful, and for your future support we are thankful. People are the heart of the matter at RWC, and because your heart is so generous, we are so blessed.

Kindest personal regards,

Stuart A. Bunting

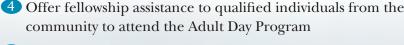
President and Chief Executive Officer

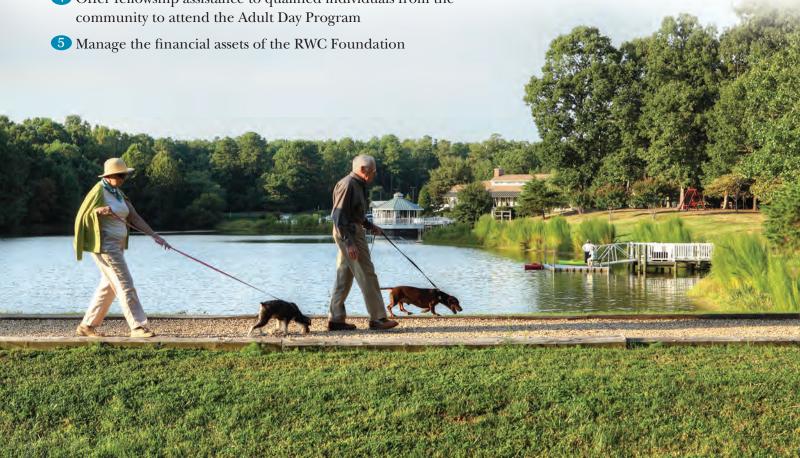
RWC Foundation Mission Statement

The Rappahannock Westminster-Canterbury Foundation is a not-for-profit corporation whose primary mission is to extend the facilities and services of Rappahannock Westminster-Canterbury, Inc., to aid as many deserving individuals as can prudently be supported with the funds available to the Foundation. In addition, the RWC Foundation fosters the operations and functions of RWC, Inc., located in Lancaster County, Virginia.

Five-Fold Purpose

- 1 Aid, strengthen and extend in every proper and useful manner the work, services and objectives of RWC, Inc.
- 2 Assure continued residency for those whose financial resources have been exhausted in spite of prudent planning
- 3 Provide financial assistance for those eligible to enter RWC who could otherwise not afford the entrance and/or monthly fees





Message from the Chair of the Foundation Board

Serving on the RWC Foundation Board, I get to see two sides of life at Rappahannock Westminster-Canterbury—the enjoyment that residents have in participating in the many activities available to us right in our neighborhood, and the work that goes on behind the scenes to make it all possible for those of us who call RWC home.

Where else could you imagine yourself enjoying a leisurely breakfast in the Grille, working out in the Fitness Center, attending a Viewpoints lecture to hear a national authority speak on a topic of current interest, and participating in a hilarious game of Wii or a relaxing game of bridge in the afternoon? Aren't we fortunate to have such a wonderful place in which to spend our time, knowing we'll never have to leave? I'm continually heartened, too, by the number of neighbors from the local community who join us for so many of our events, because they help us stay connected to one of the most beautiful spots on earth, Virginia's Northern Neck.

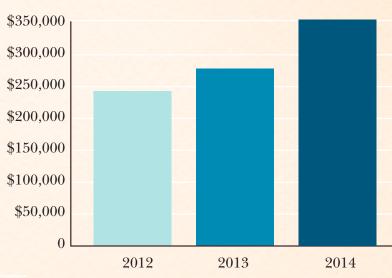
Many of the activities and amenities we enjoy are made possible by the support we receive from donors outside RWC, and the foundations and organizations that believe in what we are doing to enrich the lives of RWC residents. Their gifts—and yours—are assuring that RWC will be providing high-quality living for the next thirty years or more.



RWC Foundation Financial Statements

BALANCE SHEET ASSETS	2012-2013	2013-2014	2014-2015
Cash and Cash Equivalents	\$1,165,340	\$1,196,395	\$1,182,161
Receivables	362,583	241,803	_
Investments	3,492,786	4,430,887	6,204,673
Total Assets	\$4,873,268	\$5,020,710	\$7,386,834
LIABILITIES AND FUND BALANCE			
Payable to RWC, Inc.	\$ 31,289	\$ 44,987	\$ 91,539
Fund Balance (Net Assets)	4,989,420	5,824,098	7,295,295
Total Liabilities and Fund Balance	\$5,020,710	\$5,869,085	\$7,386,834







Number of Individuals Receiving Assistance





In this 30th Anniversary edition of the RWC Foundation Annual Report, I want to extend my thanks to all Foundation Board members past and present for their efforts in securing gifts and grants that have made it possible for RWC to grow over the past three decades and meet the changing needs and desires of its residents.

Our annual Fellowship Fund Drive and the golf tournament continue to be principal sources of revenue for the Foundation, and I want to thank everyone who contributed their time, talent, and treasure to these efforts. We continue to be grateful for all the grants we have received both locally and regionally, especially those from the Lettie Pate Whitehead Foundation, Inc. of Atlanta, Georgia. For a tenth year straight RWC has received funding from this foundation, whose grants to date are approaching \$1 million.

Where does the Foundation spend the money it raises? The Fellowship Fund is the primary resource for our work. Established prior to the opening of RWC in 1985, the fund underwrites residential fees for qualified residents. The Foundation also grants scholarships for nursing staff to pursue professional development opportunities. Our success in raising funds allows us to continue supporting the Parkinson's Support Group and other programs that benefit RWC residents and the local community in the Northern Neck and Middle Peninsula.

Let me conclude by planting a seed. One way you can help the RWC Foundation continue its work is to establish a bequest. Designating the Foundation as a recipient of a gift from your estate will allow you to leave a lasting legacy and help RWC complete projects and conduct programs outside of the budget. A bequest is an ideal way to help guarantee that RWC will be able to carry out its mission for years to come.

Whiz Harris

Whiz Harris Vice President of Development

Social Accountability

Rappahannock Westminster-Canterbury maintains a focus on community, not only within our own neighborhood but throughout the entire Northern Neck, Middle Peninsula and beyond. Our residents, staff members, trustees, friends and family have come to us from areas near and far, and we appreciate and nurture all of the character, knowledge and support each and every one offers.

A community is structured from a vision. A vision to bring excellence, wholesomeness and success to those around us and to those who keep the soul of our region alive. Our neighborhood is committed to social accountability serving as a source of support and encouragement for area organizations, clubs, schools and various initiatives put in place to better the community we all know and love.

Those we support include, but are not limited to:

Alzheimer's Association

American Cancer Society

Appleseeds Computer Users

Bank of Lancaster

Bland Contest/Lions Club

Bluff Point Men's Group

Bon Secours

Chesapeake Bank/Chesapeake Investment Group

Colonial Dames

DAR

Delta Kappa Gamma

DMV2Go Services

Episcopal Retired Clergy

Interfaith Service Council

Kingston Parish

KIWS Rotary

Lancaster Primary School Choir

Lancaster VA Educational Foundation

Lead Northern Neck

Lions Club

MOAA

Moran Creek Yacht Club

Northern Neck Computer Users Group

Northern Neck Food Bank

Northern Neck Free Health Clinic

Northern Neck Ministerial Association

Northern Neck Sail and Power Squadron

Northern Neck Society of Friends

Northumberland County Animal Shelter

Parkinson's Caregivers' Support Group

Parkinson's Support Group

Rappahannock Community College

Rappahannock Institute of Lifelong Learning

Rappahannock Music Study Club

River Counties Community Foundation

Rosary

SAR

Seconds Unlimited

St. Mary's Thrift Shop

The Animal Welfare League

The Bay Tones

Union Presbyterian Seminary

White Stone United Methodist Church Thrift Shop

Women of Grace

YMCA Bright Beginnings



Present at the Creation...

As RWC celebrates its thirtieth anniversary, two members of the staff will look back on the growth of the community with a special sense of pride. Lillian George, office manager in RWC's Resident Clinic, and Genita Maiden-Shearin, Dining Services Production Manager, have been at RWC since the community opened in 1985.

George, who was working for local physicians in 1985, saw the cottages, apartments and health center rise above the tiny trees along Irvington Road. She was hired that year as the Clinic's first office manager, and has held the same job for thirty years. In the early days, state-of-the-art technology meant an electric typewriter and later a computer and massive printer that made so much noise it was impossible to carry on a telephone conversation while it operated. The Windmill Point resident and mother of two (youngsters in 1985, now 42 and 34) remembers when the Wellness Center consisted of a rowing machine and four bicycles.

In 1985 Maiden-Shearin was a young single mother of two working at the BP station in town. A friend brought her an application and encouraged her to apply for a position at the new community out near Irvington. She was hired as a cook the day after she applied, and subsequently advanced to cook supervisor and manager before becoming production manager. Working at RWC has allowed her to send both her children to college. To help RWC celebrate its anniversary, Maiden-Shearin helped organize a celebration service in May.

George and Maiden-Shearin have seen RWC adapt to meet the changing needs of residents, adding new facilities and services. What hasn't changed, they insist, is the commitment to care that stands at the heart of RWC's mission.



Statement of Values

With a joyful spirit we pledge ourselves to:

Excellence

Compassion

Integrity

Innovation

Commitment

Trust

Respect

Mission Statement

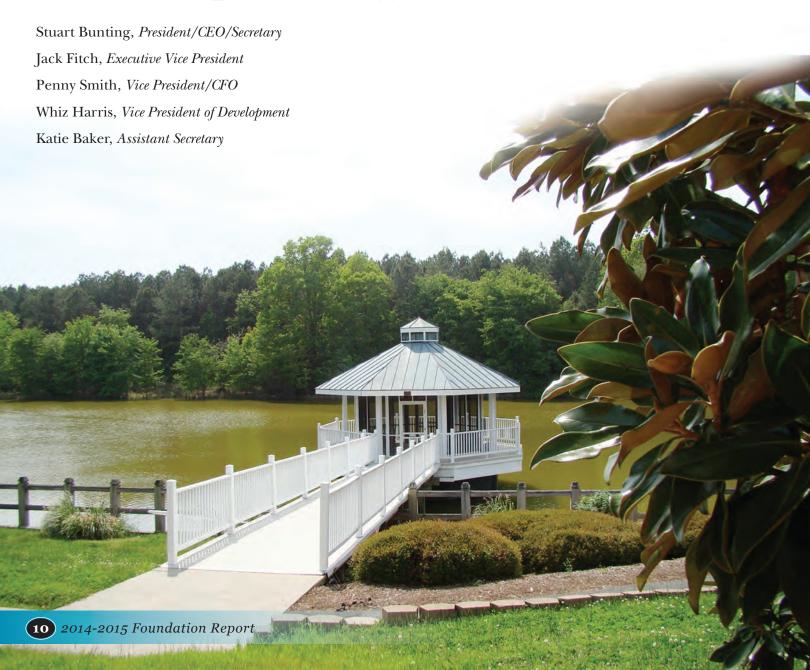
RWC is a church-related, continuing care retirement community committed to providing the highest quality living experience for senior adults.



Strategic Initiatives

- 1 Ensure RWC's long-term organizational success
- 2 Provide a comprehensive, high-quality living environment
- 3 Be an employer of choice in the Northern Neck
- 4 Execute a comprehensive development program

RWC Corporate Officers



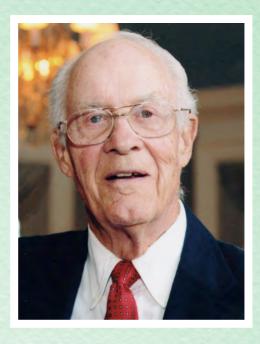
A Tradition Like No Other in the Northern Neck

It may not be the Master's, but RWC's annual golf tournament traces its heritage back a long way – in fact, it predates the opening of RWC. While construction was still underway, a group interested in helping the community decided to organize a golf tournament.

The original organizers may not have realized that their initiative would continue for more than thirty years. But every spring foursomes play on a local course to raise money for the RWC Foundation's Fellowship Fund. The array of prizes may be an attraction for some, but most who participate are happy to be assisting RWC to carry out its mission of providing a high-quality living environment for all of its residents.

The long-time success of the tournament is due in large part to a cadre of volunteers who donate their time and talent to organizing the event. For much of the tournament's history, the man at the center of those efforts was Ed French. A veteran of World War II and a 1947 graduate of the U.S. Naval Academy, Ed was a longtime executive at United States Steel. He served on the RWC Board of Directors for five years. Ed passed away in December 2014, but the tournament he helped to start in 1985 continues.

Thanks to the efforts of Ed and other volunteers, and the strong support of local businesses and individuals, residents whose funds have become exhausted despite prudent planning can be assured that they can remain a part of the RWC community.



Ed French



premier center
of excellence
for senior
adult services





Building for the Next Thirty Years... and more...

Rappahannock Westminster-Canterbury plans to construct a new Wellness Center. The 17,000 square-foot building will be located near the Chesapeake Center and apartments in the RWC neighborhood.

The larger facility will accommodate the many residents and community participants who are active in RWC's wellness programs. Though well equipped, the current fitness center cannot accommodate the needs of residents and the members of the local community who participate in RWC's programs. Currently 80% of residents participate in some form of wellness activity. More than twenty fitness classes are held at RWC each week. RWC is known nationally for the high participation rate of residents in its

wellness programs, and has been recognized by the International Council on Active Aging.

Residents and staff will be consulted so that the amenities in the new building match the needs and desires of those most likely to use the center. Preliminary designs include a three-lane pool with an area for aerobic exercise, classroom space for conducting a variety of fitness activities, offices and locker rooms. Wellness and resident life professionals will relocate to the new Wellness Center.

The architectural firm of Guernsey Tingle of Williamsburg, Bay Design Group of Glenns, and Connemara Corporation of White Stone, all of whom have done work previously at RWC, will design and complete the new building.

Angel Tree Gifts

Gifts in Memory

Clarence Alston

Mrs. Anne Alston

Archie

Anonymous

Cynthia Barlowe

Dr. Robert S. Barlowe

Henry Bashore

Mrs. Marguerite O. Bashore

Kathleen Ferrario, Benjamin A. Frye, III

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Priscilla Bunting, Anne Diggs, J. Coles Diggs, **Allen Sutton**

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Mrs. Irma H. Burke

Dr. Virginia Ladendorf

Ms. Mary Anne Campbell

Son-in-law, Pete Saloman

Mrs. Jo Lee Edwards

Dr. and Mrs. Barlett Chappell

Mrs. Margaret Emes

Misty Elbourn

Mr. and Mrs. Dale George

Gordon Graham

Mrs. Vivian F. Graham

Maria Laqueur

Mr. William G. Hamm

Ed French.

H. Hiter Harris, Jr.

Ms. Whiz Harris

Lee Hicks

Mr. and Mrs. Arthur L. Hicks

Priscilla B.L. Chilton,

Laurance Higgins

Mrs. Jane Chilton Higgins

John Houghton

Mrs. Edith Houghton

Douglas Bralley,

Simeon Burnette,

James Campbell,

Dickson McKenna

Mr. and Mrs. Charles Huckins

Mrs. Cornelia P. Huger

Ben Jones

Mrs. Susan Iones

Elizabeth Rodman,

Joyce Wellford Mrs. Patricia R. King

Grace Dorn

Capt. and Mrs. William L. King

David Lewis

Mrs. Violet Lewis

Cecelia H. Barton, Rev. George Barton, George L. Barton, IV

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Loved ones

Mrs. Ruth N. Myers

Richard Pilvelait

Mrs. Hazel Pilvelait

Harry Churchill

Dr. and Mrs. James Prince

Mr. and Mrs. John Ray,

Mr. and Mrs. John Thomas Mr. and Mrs. James Ray

Arthur V. Rice,

Dana A. Rice,

Pat Richardson,

Erica Hammett.

Warren Hammett

Mrs. Doris E. Rice

Betty Knight

Mr. and Mrs. John E. Roberts, Jr.

Fred and Jan Mewhinney

Mr. and Mrs. Walter Rogers

Thomas C. Rohr

Mrs. Brandon Rohr

The Underwoods and Schumachers

Mr. and Mrs. Clark M. Schumacher

Samuel Lee Shanks, Jr.,

RWC friends now departed

Mrs. Janice H. Shanks

Robert Butler,

Joseph Aloysius Farrell, III,

Joseph Aloysius Farrell, IV,

Carl C. Friedrichs,

Dorothy B. Friedrichs,

Maureen Farrell Ross,

Col. Eugene Small

Mrs. Linda F. Small

Rodney W. Smith

Mrs. Phyllis F. Smith

Paula Teeples

Mr. Thomas C. Teeples

George Van Sant

Mrs. Milena Van Sant

Charlotte

Ms. Chris Waldrop

Charlotte

Mr. Emory F. Waldrop

Wendell Wallace

Mrs. Gloria Wallace

Milton Musbank

Mr. and Mrs. Cloyde Wiley

Sterling Wright

Mrs. Gibson E. Wright

General Angel Tree Gifts

The Rt. Rev. Gordon T. Charlton Judge and Mrs. John R. Hess Capt. Arthur C. Johnson

Mr. and Mrs. Edwin W. Thurber

Gifts in Honor

Rev. David May

Mr. and Mrs. Peter S. Bennett

RWC Staff

Mr. and Mrs. Stuart A. Bunting

RWC Health Center Nursing Staff

Mrs. Ginny S. Burnette

My two grandchildren

Mr. Gordon Davison

Alice Chilton Higgins

Mrs. Jane Chilton Higgins

The Staff

The Rev. and Mrs. Charles Johnson

Friends and family

Mrs. Rhonnie Kerr*

Jemma Eve Lewis,

Restorative Yoga Students

Ms. Amy Lewis

The Parkinson's Support Group

Mrs. Patricia K. Morris

My family

Mrs. Julia V. Olson

June Swanell,* **Helen Withers**

Mr. and Mrs. John E. Roberts, Jr.

My daughter and her family, the Waldens Mrs. Janice H. Shanks

RWC Staff

Mrs. Rebecca Smiley and Mr. Carl Blades

Haley Smith

Mr. and Mrs. Ed Smith

RWC Staff

Mr. and Mrs. James B. Stone, III

My grandchildren

Mrs. Milena Van Sant

Staff at RWC

Mr. James White

Memorial and Honorarium Gifts

Gifts in Memory

Jessie Anderson

Mr. and Mrs. Bruce Anderson Mrs. Linda F. Small

Bill Barnes

Anonymous

Mr. and Mrs. Jay DePew Mr. James W. Kelley

Margaret Blythe

Mr. Joseph D. Beck Ms. Shelby W. Blythe Mrs. Irma H. Burke Mr. and Mrs. David C. Crowther Mr. Roger H. Donaldson Dr. and Mrs. Floyd L. Griffith Mrs. Kathy Kauffman Mr. James F. Kopenhafer Mrs. Linda F. Small Dr. Raymond H. Taylor The Staff at RWC Wednesday Night Bible Group

Mrs. Gerald T. Yagel **Alice Marie Brady**

Ms. Susan E. Whitlow

Mrs. Linda F. Small

Doug and Wynette Bralley

Mr. and Mrs. Lloyd T. Harris Mrs. Mikal Bralley Hoofnagle

Simeon Burnette

Mr. and Mrs. Ronald K. Davis Judge and Mrs. John R. Hess Mrs. Cornelia P. Huger

Jim Campbell

Mrs. Mikal Bralley Hoofnagle Mrs. Courtney Bralley Meadows

Alan Christensen

Anonymous Mrs. Patricia Beard Mrs. Jingles Browning Mr. William G. Hamm Judge and Mrs. John R. Hess Long Cove Landing Homeowners Association Mrs. Linda F. Small

Mr. and Mrs. James B. Stone, III

Virginia Reeves Cooney

The Marion and Leland T. James Fund of the River Counties Community Foundation

Grace Dorn

Judge and Mrs. John R. Hess Mrs. Gale S. Madsen Mr. and Mrs. Robert Shultz Mrs. Linda F. Small

Sue Edson

Ms. Jean C. Lewis Mrs. Linda F. Small

Althea Fitton

Anonymous Mrs. Linda F. Small

Judith Foster

Mrs. Linda F. Small

James Freeman

Mrs. Kathryn Freeman

Ed French

Anonymous Mr. and Mrs. William Gibson Mrs. Linda F. Small Mr. and Mrs. Craig H. Smith

Ed Hannum

Mrs. Faye Hannum

Harry Hardy

Mrs. Linda F. Small

Linwood C. James

The Marion and Leland T. James Fund of the River Counties Community Foundation



Memorial and Honorarium Gifts

Sue Jones

Mr. and Mrs. Richard H. Brautigam Mrs. Marydel C. Flint Mrs. Cornelia P. Huger Mrs. Mildred F. Moore

Maria Laqueur

Mr. William G. Hamm

Dickson McKenna

Anonymous Mrs. Patricia Beard Judge and Mrs. John R. Hess Mrs. Susan Jones Mrs. Susan McKenna Mrs. Linda F. Small

Geraldine Mowrar

Mr. Gregory K. Evans Mrs. Linda F. Small

Hildwin Muller

Mr. Carl M. Behrens **Cowart Seafood Corporation** Mr. James E. Daman Dr. Don E. Detmer

EVB

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Mr. Robert M. Turnbull Samuel Lee Shanks, Jr.

Mrs. Janice H. Shanks

Vonnie Shepard

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Estelle Slate

Mrs. Linda F. Small

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Mrs. Phyllis F. Smith

Paula Teeples

Mrs. Linda F. Small

Rita Walton

Mrs. H. Hiter Harris, Jr.

Barbara Wilson

Anonymous

Jinx Wright

Col. William J. Wright

Gifts in Honor

Edith Houghton

Mrs. Ginny S. Burnette

Frank Mann's 90th Birthday

Ms. Anne M. Johnson

David Charlton

Ms. Virginia Jardim

Restricted Gifts

Staff Training

Mrs. Ginny S. Burnette

Chaplain's Fund

Mr. and Mrs. Bruce Anderson Mr. Peter Dunning The Estate of Mrs. Betty Kerns Mrs. Susan McKenna Mr. Stuart Reeve The Estate of Estelle Slate

Dementia/Alzheimer's Support

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Mr. and Mrs. Ronald K. Davis Mr. and Mrs. Jay DePew Mr. William D. Todd Dr. and Mrs. W.S. Towner

Sandra Madison Memorial Scholarship Fund

Anonymous

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Dr. and Mrs. Mahlon Brown+

Mrs. Alice Marie Brady*+ Mr. Stuart A. Bunting

Mr. and Mrs. William N. Croner

Capt. Thomas B. Denegre, Jr.*+

Ms. Whiz Harris

The Heritage Society consists of individuals who have chosen to include the RWC Foundation in their estate plans.

Dr.* and Mrs.* Norman Hughes+

Mrs. Elsa M. James+

Capt.* and Mrs.* William Knull+

Dr. Robert Krug*

Brig. General and Mrs. Ward M. LeHardy+

Brig. General and Mrs.* William C. Louisell+

Mrs. Harding S. McClelland Mr. Charles G. Miller, Jr.+

Mr.* and Mrs.* Robert Scheu+ Mr. and Mrs. Robert Shultz Mr.* and Mrs. Rodney W. Smith+ Mr.* and Mrs. George Van Sant+ Mr. and Mrs.* Peter Weil Lt. General W.H. Sterling Wright*+

+ denotes Charter Member

* denotes Deceased

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Mrs. Violet Lewis Ms. Amy Lewis

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Mr. and Mrs. Ed Matthews Mrs. Harding S. McClelland

Mr. and Mrs. Donald K. McCraney

Mrs. Courtney Bralley Meadows

Mrs. Mildred F. Moore Mrs. Patricia K. Morris

Mrs. Ruth N. Myers Mrs. Helen A. Nihill

Mrs. Julia V. Olson

Mrs. Hazel Pilvelait

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Mr. Emory F. Waldrop, Jr.

Mrs. Gloria Wallace

Mr. Peter Weil Mr. James White

Ms. Susan E. Whitlow

Mr. James A. Wilde

Mr. and Mrs. Cloyde Wiley Mr. and Mrs. Peter Williams

Mrs. Gibson E. Wright

Mrs. Gerald T. Yagel

*Deceased

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\$5,000 and above

Westminster Fellows

\$2,000 to \$4,999.99

Canterbury Society \$1,000 to \$1,999.99

Fellowship Patrons

\$500 to \$999.99

Fellowship Partners

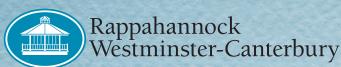
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