

Rappahannock Westminster-Canterbury Foundation Annual Report 2016 - 2017

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Pamela Bowers

Rappahannock Westminster-Canterbury Life Enrichment Center Watercolor, Pamela Bowers, 2017

Message From our CEO, Stuart Bunting



The recent opening of the Life Enrichment Center at Rappahannock Westminster-Canterbury caused me to reflect on what really enriches life. I did not have to look far. I found you, our benefactors, donors. sponsors. and supporters who are faithfully committed to enriching the lives of others. The pages of this Foundation Annual Report illustrate your gifts of time, talent, and treasure enriching the lives of others.

RWC residents past, present, and future call RWC their home because of the profound generosity of our Fellowship Fund benefactors. Through fellowship donations, golf tournament sponsorships and participation, and honor and

memorial gifts, you enrich the lives of these residents in truly magnificent and profound ways. RWC staff members continue their education in critical fields contributing to quality of life and quality care through your meaningful scholarship fund donations. Grants, bequests, and other donations enable projects that complete the lives of residents, clients, and the greater community. Wellness and caregiver support those programs for with Parkinson's Disease and memory challenges are examples of the life-enabling and meaningful projects you make possible.

One of the unique characteristics of our community of benefactors is the consistent, heartled, generous support for the life-enriching mission of the Rappahannock Westminster-Canterbury Foundation. We simply could not fulfil these missions without you. On behalf of residents, staff, trustees. clients, program participants, and so many others, I am honored to offer deep gratitude for your consistent, faithful, and generous investments that deeply impact and enrich so many lives.

May your life be touched in a special way for the care and concern you show for others through the Rappahannock Westminster-Canterbury Foundation.

RWC residents past, present, and future call RWC their home because of the profound generosity of our Fellowship Fund benefactors.

Shuart Adunting'

RWC Foundation Mission

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, located in Lancaster County, Virginia.

Purpose

- Assure continued residency for those whose financial resources have been exhausted in spite of prudent planning.
- Aid, strengthen and extend in every proper and useful manner the work, services and objectives of RWC, Inc.
- Provide financial assistance for those eligible to enter RWC who could not otherwise afford the entrance and/or monthly fees.
- Offer fellowship assistance to qualified individuals from the community to attend the Adult Day Program.
- Manage the financial assets of the RWC Foundation.

Vision

To be a premier center of excellence for senior adult services.

RWC Corporate Mission

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

RWC Corporate Officers

Stuart Bunting, President/CEO/Secretary Jack Fitch, Executive Vice President Penny Smith, Vice President/CFO/Treasurer LuAnne Davis, Vice President-Marketing & Development Phillip Williams, Vice President Operations

Statement of Values

With a joyful spirit we pledge ourselves to: Excellence, Compassion, Integrity Innovation, Commitment, Trust and Respect.

Strategic Initiatives

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

Message from our Foundation Board Chair, Jay DePew



The Rappahannock Westminster-Canterbury Foundation supports the operations of RWC by raising money to underwrite fellowships for residents and provide funds for other projects in the community. This separate nonprofit corporation has a five-fold purpose as described on page 3 of this report.

When I recently opened the website for RWC Foundation I was reminded of the message in the name: Embrace Life at RWC. What a powerful statement. This touches all those message associated with RWC and the RWC Foundation not only for residents, but also for the extended team of individual donors, volunteers, the local community and staff.

The completion this year of the new Life Enrichment Center is a vibrant, visible example in "bricks and mortar" of RWC's commitment to Embrace Life at RWC. This is a "stand out" example of what residents. donors, staff and volunteers can accomplish. Thank you to all involved in the completion and operational start-up of this facility and the various programs and services being offered.

This year encountered solid results of fundraising, through individual donations bequests and grants. Such generosity will continue to provide quality service and programs. I and the Foundation staff thank you for your financial support.

Our next fiscal year, 2017-2018, is shaping up to be an

exciting year. The RWC Foundation team is looking forward to working with you as we Embrace Life at RWC.

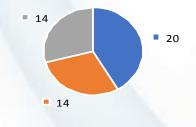
Jay De Sen

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RWC Foundation Financial Statements

Balance Sheet	2014-2015	2015-2016	2016-2017
ASSETS			
Cash and Cash Equivalents	\$1,182,161	\$943 ,591	\$872,893
Investments	<u>6,204,673</u>	<u>5,677,096</u>	<u>6,116,309</u>
Total Assets	\$7,386,834	\$6,620,687	\$6,989,202
LIABILITIES & FUND BALANCE			
Payable to RWC, Inc.	\$91,539	\$42,673	\$26,406
Fund Balance (Net Assets)	<u>7,295,295</u>	<u>6,578,014</u>	6,962,796
Total Liabilities and Fund Balance	\$7,386,834	\$6,620,687	\$6,989,202

Number of Individuals Receiving Assistance





Annual Foundation Fellowship Assistance

Message from our Vice President of Marketing and Development, LuAnne Davis



In December 2016, I assumed RWC's development responsibilities, taking over from Elizabeth "Whiz" Harris. Whiz served as the RWC Vice President of Development for fourteen years. Through her leadership the RWC Foundation thrived, and we recognize Whiz's admirable commitment and dedication.

During the past year, there have been many accomplishments at RWC under the leadership of both the Corporate Board of Trustees and Foundation Board of Trustees. RWC residents, trustees, staff, and the greater community continually support the Foundation which makes our work and mission possible. The new Life Enrichment Center is a true example of what a community coming together accomplish. From can the initial seed funding in 2003 to the many contributions for bricks and mortar and equipment, the local talents of architects, contractors and others have transformed the new center into the hub of our community. RWC residents as well as participants in our Living Well Program and our Parkinson's Support Programs benefit daily from the arts and fitness programs that enhance their quality of life.

The Fellowship Fund, through donations to the Angel Tree, Golf Tournament, memorial and honorariums continues to aid residents whose resources have become limited. This fund provides piece of mind for individuals with the guarantee that no one is ever asked to leave should their finances become depleted. Directed contributions to the Fellowship Fund from individuals and grants from community organizations and foundations support our Parkinson's Support Groups, Dementia Support Programs and Adult Day Care program. RWC is a valuable resource not only for our residents but also for community individuals.

From the marketing perspective, this year has been tremendous. Many new residents have joined our community leading us to a record census of ninety-four percent occupancy at the end of our fiscal year.

It is a privilege to be part of the RWC family. I thank you for making RWC the active adult community and employer of choice for so many who live and work here.

Sulme Daiss

2016-17 Annual Fund Grant, Bequest & Pledge Recognitions

We honor and value each and every gift made to the RWC Foundation. The following designated grants, bequests and pledged gifts represent donors who share a vision and dedication for RWC's residents and staff. Thank you for your insight and trust.

ettie Pate Whitehead Foundation

RWC was the beneficiary of a \$126,250 grant to provide Fellowship assistance to Christian women residing at RWC.

generous \$100,000 commitment for the Life Enrichment Center was received from RWC resident Mrs. Rebecca Smiley.

RWC residents Mr. & Mrs. Thomas Birdsong and Birdsong Peanuts are the benefactors of a \$53,160 grant. These funds will provide touch-screen technology for the engagement of our residents with cognitive challenges.

aude Poe Padgett Memorial Fund RWC received a \$40,000 contribution designated for RWC staff's education and training in the field of nursing.

he Estate of Phyllis Smith

RWC's Fellowship Fund was the recipient of the generous bequest of \$171,477. Phyllis and her husband, Rodney, were residents of RWC where Phyllis served on the RWC Foundation Board of Trustees.

ole Charitable Trust

This grant of \$10,000 was received for the benefit of the RWC Fellowship Fund.

j iver Counties Community Foundation

RCCF granted RWC \$10,000 to enhance a courtyard with an attractive fence and raised beds for gardening. The area is specifically designed for our residents with memory issues and dementia. Additionally, the courtyard offers a safe and enjoyable space to dig in the earth and enjoy the sunshine.

O ne of the objectives of the RWC Foundation's Fellowship Fund is to offer fellowship assistance to qualified individuals from the community to attend the Adult Day Program.

Highlights for Our Year at RWC



RWC Solution Seminars: Long Term Care Insurance Your Future. Your Plan Income Taxes & RWC A Realtor Round Table Rightsizing, Innovations in Planning and Protecting Your Legacy



The RWC Board of

the construction of

six new free-standing

approved

Trustees

homes.

RWC's 33rd Annual Golf Tournament was a huge success. We are grateful our patrons who to assisted us in exceeding our tournament goal the Foundation's for Fellowship Fund.

Pictured are the first graduates of RWC's Personal Care Aide Training class. The PCA program was established in response to the high demand for RWC at-home care givers in the Northern Neck.





Fitness Center "Wish List" donations provided new fitness equipment for the Life Enrichment Center.



Mrs. Carol Hardy, an RWC resident, has spearheaded a new initiative, Parties for Wellness, to raise funds for the Life Enrichment Center, to strengthen friendships for our current residents and to introduce community members to RWC.



RWC residents and staff collected items for a Time Capsule Ceremony. Connemara Corporation provided a lovely reception in honor of the RWC residents.



RWC is one of few continuing care communities in Virginia to offer Grind Dining, an innovative food preparation process, which restores enjoyment of mealtime for individuals with cognitive, neuromuscular and chewing disorders.





RWC - Giving Back and Social Accountability

A community is developed 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:

ALS Association DC/MD/VA Chapter Alzheimer's Association

Alzheimer's Association

Bon Secours

Boys and Girls Club of the Northern Neck

Chesapeake Academy

Christopher Newport University

Daughters of the American Revolution, Cobbs Hall Chapter

Flora Clinic

Foundation for Historic Christ Church

Garden Club of Virginia

Hospice Support Services

RWC maintains a focus on community, not only within our own neighborhood but also throughout the entire Northern Neck, Middle Peninsula and beyond.

KIWS Rotary Foundation Lancaster By the Bay Chamber of Commerce Lancaster County Sheriff's Office The Lancaster Players Lions Club Mary Ball Washington Museum & Library Memory Lane Car Club Middlesex County Chamber of Commerce Northern Neck Bay Tones Northern Neck Food Bank Northern Neck Historical Society Northern Neck Master Naturalists Northern Neck Orchestra Northern Neck Rotary Club Northumberland County Chamber of Commerce Rappahannock Community

College



Rappahannock Foundation for the Arts Rappahannock Institute of Life Long Learning Rappahannock Music Study Club Relay for Life Steamboat Era Museum Taste of the Bay The Westmoreland Players White Stone Volunteer Fire Department

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Grand Opening of RWC's New Life Enrichment Center



Those pictured above, left to right: *Front Row:* Scott VanVoorhees, Project Manager/Guernsey Tingle; Jean Light, Chesapeake Bank Wealth Management; LuAnne Davis, RWC VP Development & Marketing; AnnMarie Smith, Interior Designer/Guernsey Tingle; Stuart Bunting, RWC CEO & President, Mrs. Irma Burke, RWC Resident; Amy Lewis, RWC Sr. Resident Life Coordinator; Penny Smith, RWC CFO **Second Row:** Rev. David May, RWC Corporate Board Chair; David Jones, President, Connemara Corp; Tom Tingle, President/Guernsey Tingle; Amanda Running, Project Architect/Guernsey Tingle; Jonathan Smith, RWC Wellness Coordinator; **Back Row:** Stanley Langford, Connemara Corp; Tom Richardson, Chesapeake Bank; Wyatt Portz, RWC Fitness Instructor; Phillip Williams, RWC VP Operations; William Sommers, RWC Fitness Specialist;

The new *Life Enrichment Center* at Rappahannock Westminster-Canterbury houses 18,000 square feet of space for RWC residents and community participants. It includes a Fitness Center with state-of-theart exercise equipment, locker rooms and multiple classrooms. An Aquatics area features a 75-foot lap pool with three swim lanes, a wheelchair ramp for access and a large exercise area for water aerobics and other exercise programs. The Resident Life and Arts class-rooms provide ample space for activities, a future woodworking shop and kiln for pottery.

Chesapeake Bank financed a portion of the center's \$4.5 million cost. Williamsburg's Guernsey Tingle Architects led the design/build team. Bay Design Group provided the site design and civil engineering. Connemara Corporation of White Stone was the general contractor for the project.

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Life Enrichment Center & Equipment Donors

RWC is extremely grateful for the generosity of our residents, their families and friends, and the community. We have made every effort to include all donors for this publication. We endeavor to publish accurate recognition and apologize for errors or omissions. Please contact the Development office to report corrections. The following pages reflect donations given within our fiscal year: April 1, 2016 to March 31, 2017.

Life Enrichment Center Building Donors

Anonymous Donors Mr. Carl F. Blades, Jr. Mr. & Mrs. A. C. Blandford Mr. & Mrs. Philip Q. Booth Mr. & Mrs. Stuart A. Bunting Mr. & Mrs. John E. Byers Mrs. S. LuAnne Davis Mr. William G. Hamm Mrs. Carol Hardy Judge & Mrs. John R. Hess Mrs. Jane C. Higgins Mr. John M. Hope, Jr. Mr. John Jennings Mrs. Susan Jones Mr. & Mrs. Kerley LeBoeuf Mrs. Jean H. Light Mr. Bernard Lockstampfor Mr. & Mrs. Fred Luxton Mr. & Mrs. Gene E. Mapes Mr. Charles G. Miller, Jr. Mr. & Mrs. William F. Reisner Mrs. Brandon Rohr-Louisell

Building Donors, Continued RWC Residents' Association Mrs. Edythe D. Simmons Mrs. Rebecca R. Smiley Mr. & Mrs. Cheslie L. Smith Mr. & Mrs. James B. Stone The Rev. Dr. Judith Thomson Mrs. Kathy E. Vesley-Massey Mrs. Alice P. Walker Mr. & Mrs. Robert Wayland Mrs. Helen J. Woolfolk

Fitness Center Equipment Donors

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Angel Tree Gifts In Memory

Mr. Clarence Alston Mrs. Anne Alston

Mrs. Cynthia K. Barlowe Dr. Robert S. Barlowe

Mrs. Sterling Olson Mr. Carl Blades, Jr.

The Rev. Jere Bunting, Jr. *Mrs. Augusta Bunting*

Mr. Coles Diggs Mrs. Anne Diggs Mr. Allen Sutton Mr. & Mrs. Stuart Bunting

In Memory



Mrs. Bonnie Strickler Haney Mrs. Margaret Coates Davis Miss Julie Anne Coffman *Mrs. S. LuAnne Davis*

Mr. David Burke Mr. Frank H. Elliott

Mrs. Pat O'Shaughnessy Mr. & Mrs. William Geier

Mrs. Maria Laqueur Mr. William G. Hamm

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Mrs. Julia Jennings Mr. John Jennings

RWC Departed 2016 The Rev. & Mrs. Charles Johnson

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Mrs. Joyce Welford Mrs. Elizabeth Rodman Mrs. Patricia R. King Beloved Cousin & "sister" Mrs. Sandie L. Turner Ms. Amy Lewis

Of Family Mr. Charles T. Lewis

Mr. John Forest Hunt Mr. Scott Reinhardt Mrs. Christine Longan

Mr. Sam Marshall Mrs. Virginia Marshall

Mrs. Nellie Moss Miller Mr. Charles G. Miller

Mr. Richard Pilvelait Mrs. Hazel Pilvelait

Mrs. Barbara Williams Mr. Wyatt Portz

In Memory of our Parents Mr. and Mrs. James Ray

Mr. Arthur V. R. Rice Mrs. Dana Rice Mrs. Pat Richardson Mrs. Erica Hammett Mr. Warren Hammett Mrs. Mary Perkins *Mrs. Doris E. Rice*

Mrs. Betty Knight Mr. & Mrs. John Roberts, Jr. Angel Tree In Memory Continued

Angel Tree Gifts In Honor

The Underwoods Mr. and Mrs. Clark Schumacher

Mr. Samuel Lee Shanks, Jr. *Mrs. Janice Shanks*

Mr. Robert Butler Mr. Joseph A. Farrell, IV Mr. Carl Friedrichs Mrs. Dorothy Friedrichs Mr. Carl C. Friedrichs, Jr. Mr. Eugene J. Small Mrs. Maureen Farrell Ross *Mrs. Linda Small*

The Smith Family Mr. & Mrs. Edwin Smith

Mrs. Alice Marie Brady Mr. Joseph Starlings

Mr. Thomas M. Kelly Mrs. Regina Ward

My Dear Husband Mrs. Helen P. Withers

Lindsay & Evelyn Woolfolk Mrs. Helen J. Woolfolk

Mrs. Jinx Wright Mr. William J. Wright Alex & Archie Anonymous

RWC Staff Anonymous Mr. & Mrs. Stuart Bunting

Mrs. Jan Croner Mr. William N. Croner

RWC Residents Mr. & Mrs. Stuart Bunting Mrs. S. LuAnne Davis Mr. Sam Willis

Mrs. Doris Davison Mr. Gordon Davison

My sweet grandbabies, Jemma & Jackson Lewis *Ms. Amy Lewis*

My Family Mrs. Julia V. Olson

Ms. Elizabeth Roberts Miss Sofia Roberts Mr. and Mrs. John Roberts, Jr.

Mrs. Dottie Sites Mr. John Sites

Mary Lee & family, The Waldens, Friends, here, away, past & present *Mrs. Janice Shanks*

In Honor



Angel Tree Gifts General

Anonymous Dr.& Mrs. James Prince Mr. & Mrs. Walter Rogers

The Heritage Society

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The Heritage Society

The Rappahannock Westminster-Canterbury Heritage Society is a giving society recognizing those donors who have made, or will make, a planned gift to the RWC Foundation. It was formed in December 2005. There are twenty six individuals who are Charter Members. There are seven subsequent members.

If you are interested in learning more about the Heritage Society or becoming a member simply notify the RWC Development Office, 804-438-4175. There is no need to disclose the amount or nature of your gift.

*denotes Deceased + denotes Charter Member

RWC Foundation Donor Groups

Rappahannock Fellows \$5,000 and above Westminster Fellows \$2,000 - \$4,999 Canterbury Society \$1,000 - \$1,999

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*Deceased

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Mr. Emory Waldrop Ms. Judith L. Mitchell

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Mrs. Pat Morris Mrs. Patricia Beard

Mr. Kent McCraney Mr. David Bresett

Rev. Davis Smith Mrs. S. A. Burnette

Mrs. Helen Wither's 90th Birthday. *Mr. & Mrs. John Roberts, Jr.*

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Reception Sponsor Haywood Floor Covering, Inc.

Gold Sponsors

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Bill Hudgins Automotive RWC Staff Volunteers RWC Dining Services RWC Maintenance Dept. RWC Resident Volunteers Neptune Custom Carts Kilmarnock Inn

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Rappahannock Westminster-Canterbury Foundation

132 Lancaster Drive, Irvington, VA 22480

804-438-4000 I email: foundation@rw-c.org

www.rw-c.org

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The front cover of this 2016-2017 Annual Report is a photo of the original watercolor in the RWC Life Enrichment Center lobby.