

ALIGNED *to* SERVE

2019 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.

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THE LIFESPACE FOUNDATION OVERVIEW

AMY BRAINARD, DIRECTOR OF THE LIFESPACE FOUNDATION

As we reflect on 2019, The Lifespace Foundation is thankful for the growth we experienced. The engagement and involvement from residents and team members grew exponentially. It's not only a reflection of the generosity of the people who live and work at Lifespace communities, but also a testament to our efforts to spread our story and mission on a broader scale.

Our mission is to support the health and welfare of our residents. We partner with Lifespace communities to make the resident experience as exceptional as possible, effectively sharing this vision to increase the impact we can have. We're proud to have successfully launched "A Home for Life," our biannual publication focused on educating our donors on how they can make a difference. This followed the 2019 launch of our new website – thelivespacefoundation.org – also intended to shed light on our mission.

We were thrilled to welcome Jay Lettow to our team as The Foundation development specialist. Previously, he was a director of development at the Iowa State University Foundation. Jay's expertise and experience have been a major asset to us as he oversees our fundraising efforts. He has been truly instrumental in streamlining how we engage residents, team members and others who make our philanthropic efforts possible.

Foundation scholarships are particularly a point of pride; we were able to grant funds to 48 team members across The Lifespace organization. We believe that one of the best ways we can serve residents is by supporting team members in their pursuit of higher education and meaningful careers. Beyond resident contributions, team member giving to The Foundation increased by 21% when compared to the previous year.

As we welcomed three Texas communities to our organization in 2019 – Edgemere, Querencia at Barton Creek and The Stayton at Museum Way – we're excited to increasingly involve them in the work we do in 2020 and beyond. As with each of our Lifespace communities, resident-led Foundation Advisory Committees have started forming in these Texas locations to help spearhead donor initiatives. We're confident this is just the beginning of some great community partnerships.

Overall, 2019 was one for the books, and we're excited to share accomplishments with you within this report.

The Lifespace Foundation Mantra:
Friends Helping Friends,
Neighbors Helping Neighbors.

VIRTUAL EXPERIENCE PROVIDES AUTHENTIC BENEFITS

THE LIFESPACE FOUNDATION RENAMES SIGNATURE PROGRAM

When Beacon Hill piloted its new virtual reality technology, Billy Blake, the community's director of lifestyle, watched a resident with dementia visit his childhood home.

"He was coming up with stories and memories he hadn't thought of in 60, 70 years," Billy said, adding, "the man emotionally described what it used to look like and games he used to play."



Alice Sommerville (left) and Joan Vogel (right) try out Beacon Hill's virtual reality headsets.

The Lombard, Illinois, community is only the second community in the state to use the technology by Rendever, a Massachusetts-based company that tailors its product to seniors. Beacon Hill joins two Lifespace communities in Florida, The Waterford and Abbey Delray South, that have introduced the system.

Through The Foundation, Beacon Hill was able to purchase four headsets that provide users a 360-degree experience of images, videos and other interactive content. Billy sees educational, social and emotional benefits for residents in all levels of living, but said they anticipate a significant impact for those with Alzheimer's and other forms of dementia.

An obvious use of virtual reality is its ability to instantly transport users to the most remote places on Earth. Billy said they plan to organize a world and wellness program, where participants venture to different cities and countries each month while learning trivia about each place.

"A lot of residents have a bucket list of destinations they want to go to, but unfortunately may not be able to due to health or financial constraints," he said. "This gives them the chance to travel anywhere."

In addition to globetrotting, there are also exercise and fitness games, and immersive activities such as skydiving. There is also the family portal – where loved ones can use 360-degree cameras to film an event like a wedding or graduation, so a resident may experience it as if they were there.

Whatever its use, Billy knows there's nothing virtual about the potential it offers those they serve.

"I see it becoming huge," he added.



SCHOLARSHIPS SUPPORT CAREER ASPIRATIONS

RESIDENT GENEROSITY HELPS TEAM MEMBERS PURSUE HIGHER EDUCATION

The Lifespace Foundation, and the residents it serves, understand the value of a meaningful career and the incredible doors higher education can open. That's why for the 2019-2020 academic year, 48 scholarships were bestowed to team members across 12 communities.

"I appreciate the support of Oak Trace — it's been amazing," said Caroline Conley, a culinary server at the Downers Grove, Illinois, community the last six years. For four years, Caroline has received The Foundation scholarship from Oak Trace, providing support throughout her associate degree program.

Previously enrolled at the College of DuPage, she recently transferred to the University of Illinois at Chicago to study economics and finance, with her sights set on a career as a certified financial planner.

"I didn't have to focus on tuition; it allowed me to work two part-time jobs and save that money," she added. "It helped ease the financial burden on me and my family."

Britney Clark, a team member at Abbey Delray for 10 years, shares Caroline's appreciation.

"I'm so grateful; I don't think I'd be where I am right now without the scholarship," she said.

Britney started as a dietary aide at the Delray Beach, Florida, community. With a desire to enter the health field, but unsure of a career path, she eventually decided on a certified nursing assistant (CNA), after encouragement from colleagues.

"Everyone here is like family," said Britney. "The CNAs were so helpful. They said, 'Why don't you go to school, become a CNA?'"

So she did, earning her CNA license and transitioning her role at the community. Britney is now taking additional courses to become a nurse.

In 2019, more than \$88,000 in scholarships was awarded to Lifespace team members through The Foundation — a symbol of the bond you will find between residents and team members at Lifespace communities.



Kevin Anderson,
Friendship Village of
Bloomington



Myrtha Auguste,
Abbey Delray



Rachel Bash,
Friendship Village of
South Hills



Sophia Cajandig,
Friendship Village of
Bloomington



Wislande Ceus,
Abbey Delray South



Britney Clark,
Abbey Delray



Caroline Conley,
Oak Trace



Daphne Dareus,
Harbour's Edge



Leah Dargis,
Friendship Village of
Bloomington



Gerline
Datis-Norman,
The Waterford



Abigail DeFazio,
Friendship Village of
South Hills



Jackson Domagala,
Friendship Village of
Bloomington



Olivia Gordon,
Village on the Green



Sydney Graff,
Grand Lodge



Nicole Habjan,
Friendship Village of
South Hills



Sarah Hansen,
Friendship Village of
Bloomington



Hannah Hobbs,
Grand Lodge



Matthew Ingram,
Harbour's Edge



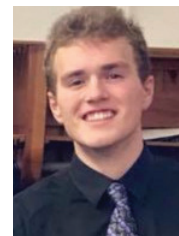
Jeremy Jahn,
Deerfield



Kaija Johnson,
Friendship Village of
Bloomington



Holli Johnson,
Grand Lodge



Caleb Kitzman,
Deerfield



Alicia Kouba,
Beacon Hill



Samantha Krupa,
Oak Trace



Julie Kurtev,
Friendship Village of
Bloomington



Rose-Glaelle
Lazare,
Abbey Delray South



Rebecca Lee,
Friendship Village of
Bloomington



Jack Mahramus,
Village on the Green



Sky Martinez,
Claridge Court



Peyton Moffitt,
Village on the Green



Catherine Mueller,
Friendship Village of
South Hills



Precious Newborn,
Friendship Village of
Bloomington



Kathryn Orcutt,
Friendship Village of
Bloomington



Ben Ostrowski,
Friendship Village of
South Hills



Daniela
Ovando-Martinez,
Village on the Green



Davis Penn,
Grand Lodge



Hayley Planitzer,
Friendship Village of
South Hills



Kaylee Prenosil,
Grand Lodge



Madeline Schmit,
Grand Lodge



Sydney Schoop,
Deerfield



Jennifer Siguenza,
Claridge Court



Ian Sopko,
Friendship Village of
South Hills



Attania Thomas,
Abbey Delray South



Taitum Torpy,
Deerfield



Cecilia Wamburu,
Claridge Court



Miranda Workman,
Grand Lodge



Sydney Yingling,
Friendship Village of
Bloomington

NEW TECH CHALLENGES MIND AND BODY

HELSINKI UNIVERSITY RESEARCH (HUR) SENSO COMBINES
EXERCISE AND BRAIN GAMES FOR A FULL-BODY WORKOUT

When Allissa Raway, fitness center manager at Friendship Village of Bloomington, introduced HUR Senso to residents, she was confident it would be a hit. The dual-tasking platform – something that works brain and body simultaneously – provides both entertainment and exercise.

“It was intriguing because it was fun, it was games,” said Allissa. “Other solutions felt more clinical.” As Friendship Village of Bloomington’s wellness lead, Allissa had intimate knowledge of the potential benefits a system like HUR Senso could deliver residents.

“We dual-task all day, every day without even knowing it,” she said, pointing to something as simple as walking and talking. “We lose some of that executive functioning as we age. This machine helps with that part; while you move your body, you do something cognitive at the same time.”

Residents and team members, present and past, have generously supported the General Use Fund to benefit their community. In June, The Foundation was able to provide a generous investment of approximately \$16,000 to purchase the equipment.

HUR Senso connects a large screen to an interactive platform the user stands on. Movements on the platform are mirrored on the display through an ever-changing suite of games that challenge and assess reaction time, memory, balance and coordination.



Connie Olson prepares for one of her daily workouts.

“It provides a unique opportunity residents probably can’t get anywhere else,” said Allissa, adding many of the programs focus on combining activities of daily living with balance, something that often accompanies cognitive decline as we age.

Residents interested in HUR Senso are required to take an orientation class to ensure they can use it safely and properly. To date, approximately 80 residents, or more than 20% of those in residential living, have completed orientation.

One resident who’s championed the technology is Connie Olson. Living with Parkinson’s, she has found the mixture of matching games and exercises have helped with some of the issues associated with the disease, such as memory and balance.

“I try to get on every day,” said Connie, who spends about 20 minutes doing a variety of games. Her favorite is hitting the ski slopes, which requires dodging virtual logs and rocks.

For residents like Connie, fresh content is never far away. New games and challenges are regularly added automatically through Friendship Village of Bloomington’s HUR Senso system.



(Above) Allissa Raway, wellness lead at Friendship Village of Bloomington, and resident Linc Shea with the community’s HUR Senso.

THREE DIFFERENT STORIES, THREE DIFFERENT TYPES OF GIVING

SUPPORTING THE FOUNDATION IS MEANINGFUL TO RESIDENTS AND TEAM MEMBERS

When Candy Bishop’s mother had a stroke in 2002, it brought to light a difficult realization – her best friend was no longer able to care for herself.

After a thorough search, Candy and her husband, Rob, eventually transitioned her mother to an assisted living community where, with regular therapy, she thrived for years. With no children of their own, the Bishops used the experience to reflect on their own lives and future.

“We needed a game plan,” she said. “There wasn’t a long line of folks wanting to look after Aunt Candy and Uncle Rob.”

So began their search of local senior living options. They looked at three communities and immediately knew Beacon Hill was the place for them. They toured on a Friday and brought a deposit back four days later.

“There isn’t a day we haven’t been grateful for Beacon Hill,” she said. “The best decision we made was to marry each other; the second best was to move here.”

Rob passed away a few years ago and Candy made the decision to establish an estate *gift* to benefit Beacon Hill residents. She has designated 10% of her remaining estate to support the community’s Benevolent Care – A Home for Life Fund.

“Knowing you have a home here, even if you outlive your assets – it’s incredible,” she added.

June Kleeman, a resident and Foundation Advisory Committee member at The Waterford in Juno Beach, Florida, shares Candy’s affinity for the place she calls home. For years, June has made *monthly contributions* to benefit the residents and team members right there in her community.



June Kleeman (left) and Candy Bishop (right).

“I offered to give monthly when I began to understand the concept of The Foundation,” she said. “I feel it is one of the ways that we can help our people who work and help us here daily. I don’t give a lot, but every little bit helps.”

It is not just residents who make financial commitments to support The Foundation. As a legacy gift, Friendship Village of South Hills Sales Counselor Lori Seuss bestowed a meaningful and remarkable *outright contribution* of \$10,000. This is earmarked to benefit The Lifespace Foundation’s Team Member Emergency Assistance Fund for team members at Friendship Village of South Hills in Upper St. Clair, Pennsylvania.

“I wanted to honor my father, as well as my mother,” said Lori, adding the fund supports Lifespace team members who face unexpected financial crisis. “We grew up learning to be givers, from tithing to donating money from our allowances. It was something that was always important in my family.”



Lori Seuss (center left) alongside some of her Friendship Village of South Hills colleagues. Executive Director Bryan Welty (far left), Sales Assistant Tina Swart (center right) and Director of Sales Bill Engel.

INAUGURAL GOLF CLASSIC FUNDRAISER DRIVES DONATIONS

FRIENDSHIP VILLAGE OF SOUTH HILLS RAISES THOUSANDS FOR THE LIFESPACE FOUNDATION — FVSH

On one of the final warm fall days in late September, more than 50 residents, team members, family, friends, and vendors at Friendship Village of South Hills participated in the community's inaugural golf classic fundraiser.

All proceeds, approximately \$8,000, were donated to The Foundation, which supports important programs and initiatives specifically in their community, such as the team member scholarship fund and the resident benevolence fund.

"I've been associated with several golf tournaments, so I knew how to put one together," said resident Don McCaig, who organized the event at Scenic Valley Golf Course in nearby Peters Township, just outside of Pittsburgh, Pennsylvania.

A best-ball, shotgun-style format complemented skilled events like longest drive and closest to the pin competitions. Afterward, a pig roast was held at the course for participants, complete with prizes and a 50/50 raffle.



Don McCaig (second from left) and members of his family.



Dean Olson



Friendship Village of South Hills Foundation Committee



LEFT TO RIGHT | Pat Callahan, Donna Carroll, Nancy Headrick, Pat Engle.

Don said he is pleased with the event's initial success, and they hope to grow its participation and impact in the coming years.

"I'm setting a fundraising goal of \$10,000 in 2020," he added. "It's low-cost and we have fun – that's it."

HONORING TENURED RESIDENTS

SEVERAL COMMUNITIES HOST "CELEBRATION OF YEARS" EVENTS

In an effort to recognize the dozens of long-time residents who call their communities home, the Foundation Advisory Committees (FACs) at Village on the Green, Abbey Delray, and The Waterford were instrumental in organizing inaugural "Celebration of Years" events.

"It was a great way to honor people who've been here a long time," said Bea Buder, FAC member at Abbey Delray.

"The overall theme centered on the many friends the honorees have made over the years," said Jim Beerman, FAC chairman at The Waterford.

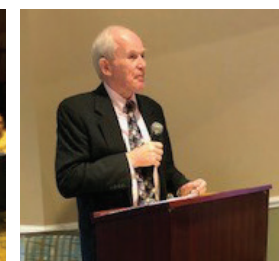
The events, catered by Thomas Cuisine and funded by The Foundation, celebrate residents who have been at their respective community for 15-plus years. Each attendee was bestowed with a certificate and plaque: 41 recipients at Village on the Green, 22 at Abbey Delray, 18 at The Waterford.

"I think it raised awareness that people in this community stay here a long time," said Larry Herbert, FAC chairman at Village on the Green, adding that more than 15% of their residents have lived there 15 years or longer.

Larry, Bea, and Jim all agree the high number of tenured residents reflects the comprehensive, convenient lifestyle provided by their communities and throughout the Lifespace organization.

"When people move to a place like this, they don't have to worry about little things in life," said Larry. "They tend to focus on things that are more positive, and they have the opportunity to do things they wouldn't if still living in their house."

"I do think it speaks to the quality of living here," added Bea. "We're offered so many advantages. I feel very safe, my children feel safe with me here – it's a wonderful life here."



(Top left) Geri Behr and Martha Jespersen, Abbey Delray residents. (Top right) Amy Brainard, director of The Lifespace Foundation and Abbey Delray resident Peggy York. (Bottom left) A few Waterford residents. (Bottom right) Jim Beermann, chairman at The Waterford.



STATEMENT OF
OPERATIONS

AND CHANGES
IN NET ASSETS
(IN THOUSANDS)

	FY 2019	FY 2018
Contributions	\$1,072	\$1,323
Investment income	999	(184)
TOTAL	2,071	1,139
Administrative expenses	535	514
Direct costs for event	-	195
Grants to projects	555	906
Change in actuarial obligation gift annuities	(37)	34
TOTAL	1,053	1,649
Change in net assets	1,018	(510)
Net assets at beginning of year	5,897	6,407
NET ASSETS AT END OF YEAR	\$6,915	\$5,897

FOUNDATION FINANCIAL
STATEMENTS

IN BALANCE SHEET
(IN THOUSANDS)

	FY 2019	FY 2018
ASSETS		
Cash & investments	\$6,824	\$5,695
Other assets	256	455
TOTAL ASSETS	\$7,080	\$6,150
LIABILITIES & NET ASSETS		
Accounts payable	\$29	\$21
Gift annuity obligations	135	231
Unearned contributions	-	-
TOTAL LIABILITIES	164	252
NET ASSETS	6,916	5,898
TOTAL LIABILITIES & NET ASSETS	\$7,080	\$6,150

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