



Westminster+Canterbury
OF THE BLUE RIDGE
FOUNDATION

2017 ANNUAL REPORT



ASSOCIATES **EDUCATION** PROGRAM

Kirstie Scott, a single mom raising two boys and helping her mother through failing health, is taking full advantage of the Foundation's Education program. Kirstie has pursued training to be a Certified Nurse Assistant and Medication Aide, and she is looking forward to taking the Phlebotomy class at PVCC. Kirstie believes "knowledge is key" and plans to achieve the State Certifications for all of these programs.

After two years at WCBR, Kirstie loves her job, not only because she enjoys the residents and her fellow associates, but because it is leading her toward her goal of one day becoming a nurse.



Jim Greene



THE **FOUNDERS' GARDEN**

Dedicated in May, 2017, the Founders' Garden offers a lovely, safe and accessible place to enjoy the out of doors. The Garden also provides an opportunity to honor a departed loved one or to pay tribute to someone special. All gifts may be designated for any Foundation program.

Jim Greene



Cover photo by Jim Greene

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J. Michael Burris, *Treasurer*
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LETTER FROM OUR LEADERSHIP

We are pleased to report to you that Westminster-Canterbury of the Blue Ridge in 2017 is strong, and growing stronger with each passing day. Where does our strength come from? It comes from residents who volunteer their time, resources and talent to create, to lead, to support and to care for one another and for those who work here. It comes from associates who not only keep our community safe, clean, healthy and vibrant, but who do so with genuine compassion and goodwill. It comes from our leaders, paid and volunteer, who commit their energies and skills to build and shape WCBR thoughtfully for all those we serve today, tomorrow and many years into the future.

WCBR is innovative. Our openness to change has allowed us to create new and varied activities and services to enhance the quality of life for residents and associates alike. Guided by the wisdom of our trustees, the Foundation has expanded its reach in order to achieve a margin of excellence. From music and art to technology, dementia care and increased pastoral services, WCBR is weaving new strands into our beautiful fabric.

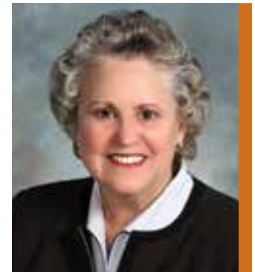
And, WCBR is compassionate. Neighbors look out for each other and extend a helping hand without being asked. Residents look for ways to show their appreciation to the associates who take care of them. Words of support and gestures of kindness are a part of everyday life here. The WCBR community is rooted in care and compassion, which continues to grow and find new avenues to enhance the lives of residents and associates alike. We depend on each other, and we thrive together.

Sincerely,

Alan Culbertson
Foundation Board Chair

Barbara McMurry
WCBR Board Chair

Gary Selmeczi
President and CEO



HOW YOUR GIFTS MADE A **DIFFERENCE**

Fellowship Assistance
\$272,753 • **9** FY 17 residents

Associates Education Scholarships
\$24,768 • **20** recipients

Associates Emergency Assistance
\$12,450 • **7** recipients



Achieving a **Margin of Excellence:** New Initiatives in Support of WCBR Programs and Services

Music and Art Programs: Concerts and therapy **\$11,000**

Technology: Live streaming of concerts and lectures **\$3,000**

Clinical Pastoral Education: **\$10,000**

Dementia Care: KETRA lighting in VISTA **\$80,000** / Certified Dementia Care
Practitioner training **\$600** / Best Practices research **\$3,000** / Robotic pets **\$712**

OUR MISSION

The WCBR Foundation gathers private support for WCBR's charitable activities including the Fellowship Program, which provides confidential assistance to residents in need.

The Foundation supports the overarching mission of WCBR, which is to provide a lifecare community of vibrant living designed to meet the dynamic needs and opportunities of older adults.

BUILDING COMMUNITY IN CHARLOTTESVILLE/ALBEMARLE

WCBR is committed to giving support to the Charlottesville/Albemarle community. Whether helping needy kids, raising funds for local causes, building trails on the United Way Day of Caring at Southwood Mobile Home Park or sharing our expertise with nurses and CNA's in training, WCBR is a strong community partner.



Benefitting the Charlottesville/Albemarle Community

7 Sisters Organization
American Red Cross
Barrett Early Learning Center
Charlottesville/Albemarle Kennel Club
Clergy, Laity United for Justice and Peace
Clericus
Charlottesville Music Teachers Association
General Presbyters
Habitat for Humanity
Hospice of the Piedmont
Leadership Charlottesville
National Exercise Trainers Association
OLLI
Parkinson's Support Group
PEO
Retired Clergy
Responsible Old Age & Death (R.O.A.D.)
The Virginia Huguenot Society
Torah Discussion Group
United Way Day of Caring
UVA Low Vision Group
Virginia Fund Raising Institute
Virginia State Bar Sr. Lawyers Conference
Virginia Blood Services
WCBR Foundation Associates Education
WCBR Foundation Associates
Emergency Assistance
WCBR Foundation Fellowship Assistance

Professional Caregiving Training Partnerships

Fluvanna County HS CNA Program
PVCC LPN Clinical Experience
PVCC Practical Nursing Clinical
PVCC RN Clinical Experience



MEET BILL KERLER

Bill Kerler spent a lot of his time giving back. He supported numerous causes during his lifetime, often leading others in helping those less fortunate. When he moved to WCBR in 2008 he quickly became active in the community, joining the WCBR Foundation Board in 2011. A wonderful combination of generous, wise and compassionate, Bill often challenged staff and Trustees with tough questions aimed at raising the bar. Bill's generosity survives him in the form of a new endowment established by his bequest. Designated for General Purposes, this endowment will allow Foundation Trustees to use its earnings where most needed for the benefit of the WCBR community. Bill's giving spirit will live on well into the future.



MEET MARY HELEN JESSUP

Throughout her life, Mary Helen Jessup was guided by the Golden Rule, "Do unto others as you would have them do unto you". This will not surprise anyone who spent time with Mary Helen, or even just passed her in the hallway, during her many years as a resident of WCBR. Her gracious smile was genuine and conveyed her kindness and compassion. Mary Helen, a steady supporter of the Foundation through her annual giving, thought ahead to the time when she would no longer be able to make these regular gifts. To continue her support after her passing, Mary Helen named the Foundation as the beneficiary of her IRA. This thoughtful gesture will sustain her legacy of Foundation support for many years to come.

THE LEGACY SOCIETY

The Legacy Society recognizes those who have chosen to leave a lasting legacy to the WCBR Foundation through estate planning. These gifts may include charitable gift annuities, beneficiary gifts of life insurance or retirement plans, resident entrance fee refunds, trusts and bequests. We thank the following individuals for including WCBR in their estate plans.

Anonymous (6)
C. Julian Bishko*
Peter and Viola Breit
Maurice Burnett
Myra Clark*
Elizabeth Craig Cockrell*
William and Janet* Collier
Monroe and Elizabeth Couper*
Lucy Crockin*
Coralee Davis*
Sarah Eisenhart*
Alfred Fernbach*
Jay B. Foote, Jr*

Robert and Charlotte Gammon*
Ben and Garland Garrett*
Lois Gebhardt
John and Jacqueline Gergen
Earle and Elvire* Hilgert
Bobbie and Roger Hill*
Bruce and Anne* Hobbs
Inge Hull
Mary Helen Jessup*
Bill Kerler*
John and Eleanor Knox*
Richard and Carolyn Lalley
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Marion Mason*
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Dudley and Lois Rochester
Jane Morris Saunier*
Arthur Scharff*
Eddie and Margaret Schodt*

James H. Scott, Jr*
Ray and Ruth Shepherd
Mary Slaughter
Arthur Stocker*
Marvin Sutphin*
Newton and Wilma Thomas*
Dorothy Tyree*
Mary B. Wagner*
Lorraine Wallenborn*
Elizabeth Williams*

* deceased

BLUE RIDGE CIRCLE DONORS

We wish to honor those whose cumulative gifts over many years have reached or exceeded \$100,000. The generosity of these individuals, foundations, and estates has greatly strengthened the Foundation.

Anonymous (4)
Estate of Sarah (Lala) Eisenhart
Estate of Jay Foote
Estate of Fred and Harriet Lewin
Estate of William Kerler

John and Eleanor Knox*
Estate of Betsy McClelland
Percy and Eleanor Montague*
Ned and Frances Morris*
Estate of James H. Scott, Jr.

Estate of Wilma and Newton Thomas
Estate of Mary Wagner
Lettie Pate Whitehead Foundation
WCBR Gift Shop
* deceased



Lois Gebhardt

ANNUAL FUND DONORS FOR FISCAL YEAR 17 (JULY 1, 2016–JUNE 30, 2017)

We value each and every gift made to the WCBR Foundation. **Donors whose cumulative gifts total \$1,000 or more during the Fiscal Year are now recognized as members of the Foundation Circle, indicated by green headings below.**

SUPERHEROES: \$500,000+
Estate of William Kerler

CHAMPIONS: \$100,000+
Estate of Harriet Lewin
Lettie Pate Whitehead Foundation
Estate of Jay Foote

HEROES: \$25,000–\$49,999
Estate of Frances Morris
Estate of Mary Helen Jessup
Mary Beth Smyth
WCBR Gift Shop

PATRONS: \$10,000–\$24,999
Constance Bowman

BENEFACTORS: \$5,000–\$9,999
Anonymous
David and Cathleen Barton
Sam and Joy Macdonald Boatwright
Edith Catlin
James and Rebecca Craig

Estate of Coralee Davis
FLIK Lifestyles
Bruce Hobbs
Lucie Kelly
George and Janet Larie
Peggy MacAvoy
Gladys McCubbin
Mental Health Services Fund
in the CACF
Stanton Nolan
Dudley and Lois Rochester
Shelah Scott
Ann Smith[◊]

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Janice Bernhard
Lois Gebhardt

James and Betsy Greene
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McGuire Woods LLP
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John and Betty Scott
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Seneff Family Foundation
Siemens
Spectrum Consultants, Inc
Joan Standish
Charles and Deborah Stewart
Rick and Sally Watson
Mary Jane Wiecking
Robert and Leah Yost
Arline Zaborowski
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BB&T Capital Markets

BB&T Insurance Service
Mona Beard
Katherine Bevacqua
Neil Boger
Robert and Suzanne Brooks
Lauree Brunfeldt
Peter and Jane Buchanan
Maurice Burnett
J. Michael and Dianne Burris
Michael and Ann Campbell
Robert and Inez Carlisle
Ranny and Lucy Church
Cii Service of Central VA, Inc.
Marjorie Clark
Joan Clements
Mary Clements
CliftonLarsonAllen, LLP
Bill and Lillian Clinger
William Collier
James and Wendy Craig
Patricia Dabney
Marilyn Dailey

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 Frontrunner Signs
 Samuel Gammon
 William and Glenda George
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 Annette Gibbs
 Jackson and Maria Gilbert
 Vincent and Iveagh Gott
 Russell and Nancy Grimes
 Jacquelin Guter
 Peggy Harbert
 Earle Hilgert
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 Inge Hull

Patsy Hunt
 Mary Helen Jessup*
 Michael Kaminski
 Carolyn Kelly
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 Jack and Sally Rinehart
 Dennis and Ann Rooker
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 Eric and Angela Smith
 Frank Smith
 The Ceiling & Floor Shop
 Turner Wick Construction
 UNUM Group



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 Nancy Beck
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WW Associates

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Heather Baggett
Chase Investment Counsel
Corporation
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Jerry Harris
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The GE Foundation
Robert and Donna Tucker
Douglas and Norvene Vest
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Health Committee**
Frankie Welch

CONTRIBUTORS: \$100–\$249

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Gretel Braidwood &
Raymond Tindel

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Anita Snidero
Ross and Susan Thomas
A. Richard and Sheila Thompson
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Ned and Janet Yost

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Mike and Peggy Van Yahres
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Page and Peggy Williams
Lloyd and Margaret Willis
Mary Woloski

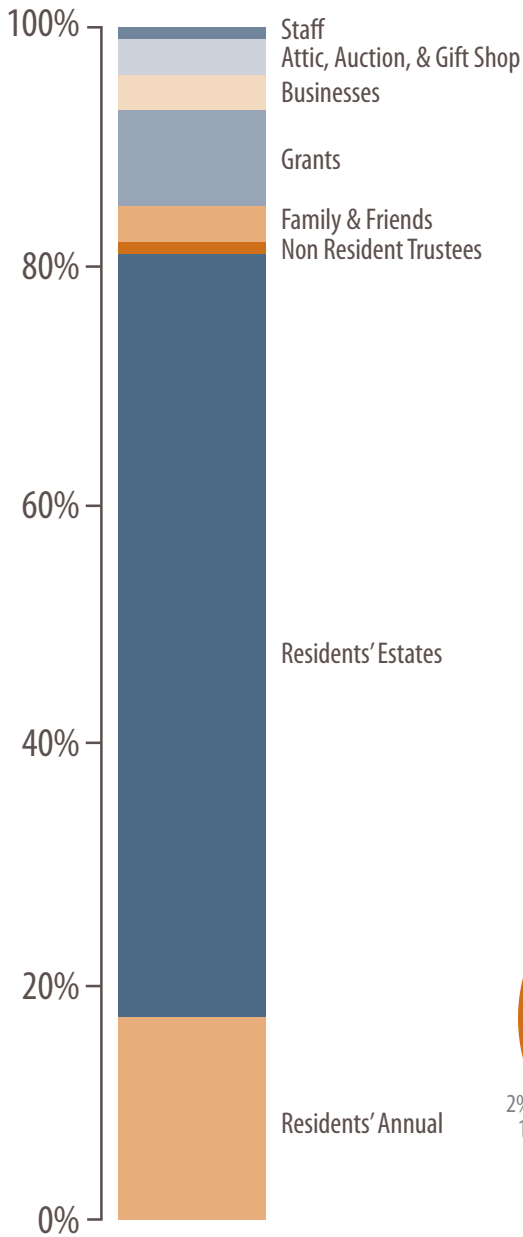
IN KIND DONORS

Wendy Brown
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Lynn Childers
Dorothy DeCesare
Michael and Laurie Harbert
Lorraine Jones*
Edward and Martha Kingston
Gerald Kinne
Letitia Locker
Terrance Martin
Robert and Roslyn Nathan
Charles and Julie Stamm
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Eugene and Marianna Williams

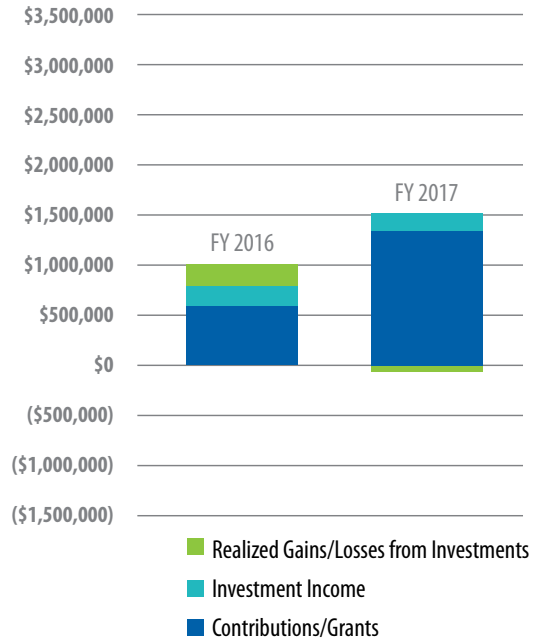
* deceased

◇ includes matching gift

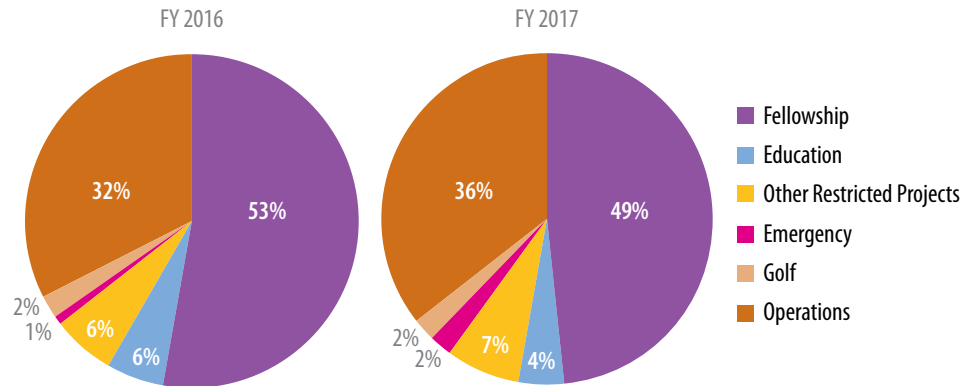
Foundation Funding Sources



Foundation Revenue



Foundation Expenses



WESTMINSTER-CANTERBURY OF THE BLUE RIDGE YEAR ENDED JUNE, 30, 2017

	CORPORATION	FOUNDATION
Balance Sheet		
ASSETS		
Total Current Assets	\$ 37,198,040	\$ 14,539,942
Assets limited as to Use, Net of Current Position	1,895,923	0
Property and Equipment, Net	133,911,977	0
Beneficial Interest in Net Assets of Westminster-Canterbury of the Blue Ridge Foundation	14,542,012	0
Other Assets		
Charitable Remainder Trusts	0	2,070
Gift Annuity Investments		4,399
Deposits	654,439	
Deferred Marketing Costs, Net	374,632	0
Total Assets	188,577,023	14,546,411
LIABILITIES AND NET ASSETS		
Total Current Liabilities	6,190,100	0
Long-Term Debt, Less Current Maturities	73,085,982	0
Other Liabilities	105,487,912	4,399
Total Liabilities	184,763,994	4,399
NET ASSETS		
Unrestricted	(5,357,458)	5,344,309
Temporarily Unrestricted	8,237,860	8,237,860
Permanently Restricted	959,843	959,843
Total Net Assets	3,840,245	14,542,012
Total Liabilities and Net Assets	188,604,239	14,546,411
Statement of Changes in Net Assets		
Change in Net Assets (Deficit)	6,794,389	2,449,801
Net Assets (Deficit) — Beginning of Year	(2,954,144)	12,092,211
NET ASSETS—END OF YEAR	3,840,245	14,542,012
Statement of Operations and Changes in Unrestricted Net Assets		
Total Revenues, Gains and Other Support	35,939,550	1,836,254
Total Expenses	32,982,789	*482,114
Operating Income	2,956,761	1,354,140
Nonoperating Income	1,380,795	NA
Other Changes in Unrestricted Net Assets	7,032	NA
Increase in Unrestricted Net Assets	\$ 4,344,588	\$ 1,354,140

* Includes Fellowship grants given



Jim Greene



Jim Greene



Jim Greene

GOLF TOURNAMENT

On a beautiful late September day we marked the 25th edition of the Foundation's Annual Golf Tournament, whose proceeds benefit the Fellowship Program. Sponsor support was strong and resident players and volunteers were in abundance. Sincere thanks to the following generous supporters.

\$5,000 FOUNDATION TOURNAMENT SPONSORS

Flik Lifestyles

\$2,500 FOUNDER SPONSORS

Matthews Development Co., LLC

Siemens Industry, Inc.

SimplexGrinnell

SFCS, Inc.

Spectrum Marketing, Inc.

\$1,500 FELLOW SPONSORS

McGuire Woods, LLP

Whiting-Turner Contracting Co.

Pepsi Cola Bottling Company of Central VA

\$1,250 SCORECARD/SCOREBOARD SPONSOR

CliftonLarsonAllen, LLP

\$1,100 MULLIGAN SPONSOR

SKV Group, LLC

\$1,000 FRIEND SPONSORS

Abrahamse & Company

Actel Communications, LLC

Cii Service of Central VA, Inc.

Mangham Associates

SunTrust Bank

T&N Printing

W. E. Brown

\$750 BEVERAGE CART SPONSOR

Roof Top Services, LLC

\$650 DRIVING RANGE SPONSOR

Home Instead

\$650 PUTTING GREEN SPONSOR

WW Associates

\$500 HOLE SPONSORS

BB&T Capital Markets /Healthcare Finance

BB&T Insurance Services

The Ceiling & Floor Shop, Inc.

Dynamic Mobile Imaging

Glynn Devins

James River Grounds Management

Fisher Electrical

\$700 TEAM SPONSORS

Advanced Network Systems

Ecolab

Frontrunner Signs

WCBR Resident Teams (3)

Individual Team

SUPPORTERS

Albemarle Magazine

Capstone Access

Dominion of Bedford

Eastern Alliance Insurance Group

Saville Produce

Old Trail Golf

Optima Health

BLUE RIDGE GIFT SHOP

Over 60 resident volunteers commit their time and talent to this dynamic shop. Under the leadership of Co-Managers Wanda Blake and Glee Deodhar, the Gift Shop generated more than \$25,000 for the Fellowship program. The Gift Shop enriches life in the WCBR community by providing a great shopping experience for staff and residents as well as tremendous financial support to our leading charitable effort.

BLUE RIDGE ATTIC

Thanks to the thoughtfulness of residents downsizing or upgrading their households, this outstanding re-sale shop, located in Cottage 225, has blossomed. Staffed entirely by resident volunteers, the Attic is filled with a wide variety of gently used household goods available for purchase by Associates. All proceeds benefit the Associates Emergency and Education programs.