Dear Friends,

We are pleased to present our FY23 (July 1, 2022 - June 30, 2023) annual report, Change in a Changing World. We hope you will be inspired by the changes you have enabled. Inside we will focus on WCBR’s strategic plan, the WCBR Foundation’s philanthropic priorities, and some of the many stories and outcomes brought about by the collaboration among residents, associates, board members, donors, family, and friends.

WCBR and the WCBR Foundation have remained focused on our mission and pursuing the strategic plan, Portrait of the Future. This year WCBR and the WCBR Foundation invested in both innovative and evidence-based programs and services, and supported residents, associates, and strategic initiatives that change people’s lives for the better. All the programs and services supported by the Foundation touch real lives – residents, your neighbors, family members, friends, associates – those who make WCBR a great place to live, work, and thrive.

We live in a fast-changing world. From advancements in healthcare, technology, and shifts in culture and workforce demands, our world is evolving in new ways. In a dynamic environment, our ability to adapt and change becomes essential to thrive. To navigate our world successfully, we need to develop a mindset that embraces learning, fosters curiosity and interest in new ideas and perspectives. Change brings great possibilities.

As residents’ needs and desires change, and as knowledge of new best-practices is understood, we continue to invest heavily in programs that support health and well-being across our continuum (pages 6 – 8). And as we seek to be the employer of choice in an increasingly changing environment, it requires that we find new advantages. By providing a supportive environment with creative benefits, we will mitigate challenges and ensure our associates have the tools and skills to give their very best (pages 10 – 14).

Altogether, the Foundation provided $410,239 in programs this year.

WCBR was fortunate to have the once-in-a-lifetime opportunity to acquire the 50 acres contiguous to our campus. This strategic land acquisition provides WCBR with the ability to control our future growth opportunities and manage change.

The WCBR Board of Trustees and the WCBR Foundation Board of Trustees are excited to support the mission and vision of today and tomorrow. The WCBR Board welcomed three new members as did the Foundation Board. Both Boards continue to seek members who have a variety of perspectives, and who represent diverse communities, skill sets, experience, and knowledge.

This annual report also presents the financial health of the organization during FY23 through consolidated financial statements. We extend our deepest appreciation to you - our donors, residents, associates, board members, family and friends who make WCBR an exceptional place to live, work and thrive.

Thank you.
WCBR and the WCBR Foundation are rooted in compassion. The tradition of thoughtful and generous giving at WCBR dates to the incorporation of WCBR in 1985 and expanded in its reach when the WCBR Foundation was formed as a supporting organization in 1998.

Leadership and the WCBR Foundation Board are pleased to work together to advance philanthropic opportunities that are meaningful to the WCBR community, to celebrate stories of giving and receiving, and to steward the generosity of the WCBR Foundation donor family. The WCBR Foundation Board requests gifts for: Unrestricted* purposes, Health and Well-Being Across the Continuum*, Fellowship Assistance, Resident Support, Associate Support*, and The Newton and Wilma Thomas Education and Workforce Development Fund. *The WCBR Foundation Board calls special attention to these three funds which currently have the highest demand for support.

Together, we change lives.
“This year I participated in the Leadership Development program and the Diversity, Equity, Inclusion, and Accessibility program offered through WCBR. Both programs were extremely beneficial as they provided an opportunity to learn more about myself as a leader and build relationships with others at WCBR. I also learned how others are fostering positive changes and pursuing improvement and growth within their departments. Both programs allowed participants to connect as people in a shared community, work together towards common goals, and grow as individuals. Thank you.”

- Leah Queen, Health Services Admin

“Thank you for investing in the development of associates. I am a proponent of lifelong learning and leadership training. This year’s Diversity, Equity, Inclusion, Accessibility, Belonging, and Leadership Development programs helped team members gain a better understanding and appreciation for each other as individuals and contributors to our community. Only once you understand yourself, can you begin to appreciate others and become highly effective leaders. Together, with your continued support and caring, we are on the path to realize greatness.”

- Tony Marbury, Director of IT

“While all our gifts are important, one way I choose to support the WCBR community is to make unrestricted gifts because they allow the Foundation to respond to changing needs and priorities, back non-budgeted programs and projects, and help ensure a bright future for generations to come. I want WCBR to be here and thriving always!”

- Annette Gibbs, resident and donor
Creating Community.

Unrestricted

Unrestricted gifts are powerful and help us address needs with unrestricted thinking. They provide the WCBR Foundation Board of Trustees with latitude and resources to fulfill our mission, meet areas of greatest need, enhance our community, support planning and implementation of future programs and services, and strengthen our financial position.

Unrestricted gifts are frequently the key to converting a bright idea into meaningful action, they fuel progress, accelerate innovation, and allow us to focus on what is important. Unrestricted funds cover board designated philanthropic program expenses, bank and investment management fees, and Foundation and allocated operational expenses. In FY23, the Foundation supported multiple Leadership Development, Diversity, Equity, Inclusion, Accessibility, and Belonging programs for associates, and Associate Service Awards totaling $103,731. This investment in our associates’ growth will further enhance WCBR's ability to adapt and succeed in a changing world.

Additionally, through the President’s Discretionary Fund, the WCBR Foundation was pleased to provide Beyond the Horizon, A History of Westminster-Canterbury of the Blue Ridge, written by resident Jane Sigloh, to residents, Board members, and each department at WCBR. Learning about our past and how WCBR has changed helps inform future chapters.

Fellowship

One thing that hasn’t changed is our dedication to caring for our neighbors. Since its founding, WCBR has provided an important safety net for residents who have outlived their financial resources and are no longer able to afford their WCBR monthly fee and assisted select individuals with entry. To date, no residents have ever had to leave the community for lack of funds. The Fellowship program remains strong in supporting residents and offers one-time financial assistance to select prospective residents who are unable to fully pay the WCBR entrance fee, but whose community ties and contributions make them deserving of special consideration.

In FY23, the Foundation supported Fellowship requests to the amount of $76,027. Your neighbors are most grateful for your support.
“Contributions to the Health and Well-Being Across the Continuum fund make a discernible difference in the lives of so many residents. My sister, Shirley Wendell, a resident in Vista, has been an active participant in the Singing Seniors program, sang in the Juneteenth choir performance, and enjoys the music sessions conducted by The Front Porch, a local nonprofit with whom the WCBR Foundation partners.”

- Shirley Wendell, resident and donor, with her brother Bill and sister-in-law Gail
Health and Well-Being Across the Continuum

Residents come to live at WCBR because we are a Lifecare retirement community that provides independent living, catered living, memory care, skilled nursing care, and rehabilitation therapies. But what makes WCBR extraordinary is the Foundation’s drive to support the very best holistic care. Staying engaged and active physically, mentally, socially, and spiritually plays a significant role in determining the length and quality of our lives. Because of the support of our donors, we are able to provide innovative and best-practice solutions to health and well-being needs.

Offerings include specialized fitness classes; stimulating social, cultural, art, and performance activities; lifelong learning educational classes; a comprehensive library; pastoral care; music, recreational and art therapy; memory care programs; and much more. In FY23, support totaling $113,913 was provided through the Health and Well-Being Across the Continuum fund. Here are some highlights:

Music and music therapy are proven to lower blood pressure and heart rate, improve breathing, relax muscles, help with pain management, and reduce symptoms of stress, anxiety, and depression. Music also stimulates several parts of our brain, including the hippocampus which is involved in memories, experiences, and context.

- The evening WCBR Concert Series showcased 10 performances of local, national, and international musicians.
- Singing Seniors provided an opportunity to socialize with friends while making music together while being led by an instructor. This program is an inclusive, ability focused approach – everyone can participate.
- Musical supplies and instruments were purchased for the care areas.
- Several musical performances and therapy sessions were supported in the care areas. The Front Porch sing-a-longs are always a big hit!

Art improves cognitive function, mood, and motor skills while also providing pain relief and a fun way to socialize. Art is accessible to all and provides a great way to express ourselves without rules.

- Art supplies were purchased for independent living, catered living, health care, and Vista.
- Oil painting and watercolor classes were supported.
- Residents living in Catered Living, Healthcare, and Vista had the opportunity to participate in Tray Play, a sensory activity that stimulates participant’s senses of touch, smell, taste, sight, and hearing.
- WCBaRts, a vibrant art class designed to actively include people of all abilities, was enjoyed by many. The artists used mediums including collage, painting, mosaics, and fabric. At the culmination of the program, art shows were held to celebrate. The art-making sessions were hosted by a community art therapist, Sigrid Eilertson.
Intellectual growth is important to members of the WCBR community and is good for one’s brain, mental well-being, self-esteem, and meaning-making.

- The Foundation was pleased to support the Jessup Memorial Library with the purchase of several new books and other materials.
- Honorariums were provided to speakers Marc Boston, Dr. Tracey Gendron, Dr. Joseph Williams, Dr. Jenny Inker, and others in recognition of their service and knowledge.
- The Great Courses license was purchased so residents could gather and enjoy lectures together.
- Bridge is a challenging card game that can help maintain and build brain health because it requires players to plan, use working memory, sequence, and more. The game also provides an opportunity for social interaction. Even research studies show bridge to be an effective tool to improve memory and reasoning. For these reasons, the Foundation was pleased to support Bridge lessons for residents.
- A virtual travel program including sensory activities was created for Health Care.
- A curated selection of games was purchased for Health Care.
- Special celebrations that include learning opportunities were supported, e.g., Juneteenth

Memory Care programs support those living with mild cognitive impairment or dementia, family, friends, neighbors, and associates — and embrace strengths that each unique person holds.

- Hearthstone’s engagement-focused program promotes well-being and enhanced quality of life among people living with dementia and/or mild cognitive impairment. This year, the Foundation supported Hearthstone training and operational costs in Vista and Catered Living.
- The WCBR Foundation was pleased to augment programs for residents living with dementia including music, art, movement, and other specialized therapies.

Practicing spiritual care is notably associated with health, optimism, resilience, and transcendence that leads to growth and transformation.

- Supplies were purchased to implement Code Lavender, a crisis intervention tool used to support caregivers who become overstressed or mentally exhausted. This program recognizes that associates are affected by stressors like fatigue, death, and emergencies. Caregivers see life and death, happiness and trauma. They experience things that many never will. They do it because it’s their calling. Code Lavender frequently utilizes a pause, aromatherapy, readings, or other meditative practice.
- Special Chaplain-led programs to include the annual Service of Remembrance, and Vesper service supplies are supported.
Fitness, movement, and activities that strengthen muscles are important to our brains and bodies. The Foundation is pleased to support the Fitness and Aquatics team, recreational therapist and activities coordinators on campus who make movement fun and accessible to people of all abilities.

- Weights were purchased for Catered Living.
- T’ai Chi continues to be enthusiastically supported and attended.
- Pool tables were refelted.

Technology, when used correctly, can improve quality care, and enhance engagement.

- Two Attendant® Bluetooth Wheelchair Scales, an otoscope, and ear irrigation system were purchased for Health Care.

As of July 1, 2022, earlier purpose-related funds that are similar in use are stated in the annual report under this category.

**Resident Support**

As we strive to be the premier Lifecare community, there may be additional opportunities for philanthropy to make a difference. This fund provides flexible support to address new or changing high priority needs so we can best care for our residents.

In FY23, no requests for support were received; expenses were $0.

“I have proudly supported the WCBR Foundation since 2008 because it helps so many people!”

- Edith Parker, resident and donor
"I am grateful to the Foundation for the programs from which I have benefited. The Thomas Education and Workforce Development Fund has given me the opportunity to continue learning without the burdens of financial strain. Thank you!"

- Yulonda Lewis, scholarship recipient and Clinical Nurse Manager

"Thank you for the opportunity that you have granted me in continuing my education with WCBR. With this fund, I was able to enroll in classes that teach about Heating, Ventilation, and Air Conditioning that I can put to use here at WCBR. Thank you so very much; it is much appreciated."

- Landus Banks, scholarship recipient and Maintenance Technician
Shaping Bright Futures.

We value our associates as they enable the ‘art of living well.’ We are inspired by their dedication and are pleased to support them.

The Newton and Wilma Thomas Education and Workforce Development Fund

We value our associates and wish to provide them with the skills and tools they need so they can advance their careers here at WCBR. Programs proudly include scholarships; student loan repayment assistance; financial support for conferences, workshops, and licensing or certification beyond minimum employment requirements; and individual or group training programs to grow knowledge and skills.

In FY23, support totaling $72,246 was provided under the umbrella of Education and Workforce Development. Here are some highlights:

- 26 associates received educational support
- 10 associates received student loan repayment assistance

As of July 1, 2022, earlier purpose-related funds that are similar in use are stated in the annual report under this category.
Associate Support

Attracting and retaining associates who are dedicated to excellence and service is a top priority at WCBR and we know it takes more than fair pay and benefits to secure the best team. Our programs provide a sense of purpose and community by recognizing our associates, create a thriving culture of belonging, and assist associates during times of crisis. This fund also provides flexibility to support additional high priority needs so we can best express appreciation for the service and care provided by our extraordinary associates.

In FY23, support totaling $35,141 was provided under the umbrella of Associate Support. Here are some highlights:

- Emergency Assistance was provided to 6 associates
- Associate Recognition Awards were provided to those celebrating service milestones
- Equipment to implement Touchtown for associates was procured to enable WCBR to share timely information and organizational updates

As of July 1, 2022, earlier purpose-related funds that are similar in use are stated in the annual report under this category.
Legacy Society Members

FY23

101

Legacy Society Members
The Legacy Society

The strength of WCBR depends in large part upon the foresight and support of those who look to the future. Legacy gifts in all amounts help the WCBR Foundation to continue its mission. The Legacy Society gratefully acknowledges donors chosen to include the WCBR Foundation in their will or other estate planning.

Anonymous(9)
Jean Arey*
Bill and Randy Baskerville
Mona Beard
C. Julian Bishko*
George Brannock*
Viola and Pater* Breit
Peter Buchanan
Maurice Burnett*
Margaret Causey
Myra Clark*
Elisabeth C. Cockrell*
William and Janet Collier*
Monroe and Elizabeth Couper*
Lucy Crockin*
Coralee B. Davis*
Jeanne Davis*
Sarah Eisenhart*
Haidee Ewell*
Alfred Fernbach*
Lester Fink*
Jay Foote, Jr.*
Robert and Charlotte Gammon*
Samuel Gammon
Lois Gebhardt
John and Jacqueline Gergen
Glenda and Bill* George
Annette Gibbs
Dorothy Glenn*
Earle and Elvire Hilgert*
Roger and Bobbie Hill*
Bruce and Anne* Hobbs
Irene Hoge*
Annette Hollo
Paul Holman*
Mary Howard*
Inge Hull
Mary Helen Jessup*
Lorraine Woodmansee Jones*
William “Bill” Kerler*
Barbara Kirkland
Carolyn and Richard* Lalley
Mildred Lapsley*
Rohn and Connie Laudenschlager
Judith Lenox
Fred and Harriet Lewin*
Peter Mason*
Betty McClelland*
Helen Adair Miller*
Nena Miller*
Hilda Monroe*
Percy and Eleanor Montague*
Robert Morf*
Edmund “Ned” and Frances Morris*
Stan and Marion Nolan*
Caleb Pennock*
Joy and Charles* Perry
Mary Louise B. “Lou” Potter
Peggy and Perrin Quarles
Margaret S. Robinson*
Dudley and Lois* Rochester
Mary Rohmann*
Arthur Scharff*
Eddie and Margaret Schodt*
Elizabeth P. Scott*
James H. Scott, Jr.*
Ruth Shepherd
Denny and Jane Sigloh
Mary Slaughter
Arthur F. Stocker*
Marvin Sutphin*
Newton and Wilma Thomas*
Ross and Susan Thomas
Dorothy Tyree*
Sylvia and Jack* Valloric
Josephine “Primrose” Vining*
Mary B. Wagner*
Virgil Wagner
Lorraine Wallenborn*
Alison Waterman*
Thomas G. Wayland*
Lily W. Weaver*
Karin Wittenborg

*deceased
A separate Tribute publication will be released in January 2024 listing all memorial and honorary gifts received in calendar year 2023.

Every effort has been made to ensure the accuracy of the donor lists. We apologize for any errors or omissions and ask that you bring those to our attention by calling the Development Office at (434) 972-2574.
Change Begins Here.

The Blue Ridge Circle

The Blue Ridge Circle honors donors whose cumulative gifts over the years have reached or exceeded $100,000.

Anonymous (2)
Anonymous
C. Julian and Lucretia R. Bishko*
Constance Bowman*
Maurice Burnett*
Sarah Eisenhart*
Lester Fink*
Jay Foote*
Earle Hilgert*
Lucie Kelly*
William Kerler*
John and Eleanor Knox*
Lettie Pate Whitehead Foundation, Inc.
Harriet B. Lewin*
Betty McClelland*
Nena Miller*
Hilda Monroe*
Ned and Frances Morris*
Dudley and Lois* Rochester
Arthur B. Scharff*
Elizabeth P. Scott*
James H. Scott, Jr.*
Mary Beth Smyth*
Newton and Wilma Thomas*
Mary B. Wagner*
WCBR Gift Shop

The Foundation Circle

The Foundation Circle honors donors whose cumulative gifts during the fiscal year (July 1, 2022 – June 30, 2023) reached or exceeded $1,000. We recognize those who made a difference this fiscal year.

Anonymous
Bill and Martha Bachman
David and Catheleen Barton
Bill and Randy Baskerville
John and Nancy Baum
Mona Beard
Elizabeth Beckwith
Suzanne Berry
Kathy Bevacqua
Joy Macdonald Boatwright and Sam Boatwright
Bob Bond
Blair Bourque
David Brant
Lauree Brunfeldt
Don and Jan Burland
Robert and Inez Carlisle
Nick and Linda* Carter
Edith Catlin
Peter and Didi Chapin
Bruce and Jamie Chase
Lucy Church
Marjorie Clark
Patricia Dabney
Mac and Jan Dean
Glee Deodhar
John and Debbie Desmond
Alice DiBlasi
T.C. and Sarah Dickerson
Sue Dickler
Earl and Louise Dudley
Mark Fletcher and Leslie Durr
Dick and Barbara Fontaine
Lettie Pate Whitehead Foundation, Inc.
Cal and Ann Fowler
Annette Gibbs
WCBR Gift Shop
Peggy Granberry
Jim and Betsy Greene
Russ and Nancy Grimes
Jacquelin Guter
George and Terri Hamrick
Mary Hamrick
Peggy Harbert
Margaret Hart
Sue and Joe Hartsoe
Olin* and Donna Herndon
Rebecca and Jeff Hill
David and Carol Hogg
Jim and Mary Holden
Inge Hull
Don and Linda Hunt
Brian and Robyn Jackson
Scott and Joan Kammire
Carolyn Kelly
Jim and Diane Kingsbury
Zurab and Betty Kobiashvili
Janet Larie
Ronald and Margaret Layne
Mary Ann Leeper
Henry and Angelica Light
Walter and Anita Maeder
David and Eleanor Maloney
Beverley McCoid
Joan McGovern
Alice Meador
James Meharg
Liz Meiburg
Skip and Ginger* Meislahn

*deceased
Honor Roll of Donors

Each and every gift made through the WCBR Foundation to support our residents and associates makes a difference. We recognize those who made a positive impact this fiscal year.

Catherine Anninos
Kay Ansell
Roger and Donna Authers
Martha Ballenger
Matthew and Joy Barresi
Joan Bascom
Barry Battle
Dolores Bedell
Gretel Braidwood and Raymond Tindel
Laura Brier
Steve and Carolyn Brown
David and Delores Brush
Nancy Bryant
Peter Buchanan
Anna and Ron Buchanan
Kerry and Katherine Caramanis
Laura Catlin
Mary Caudill
Margaret Causey
Katharine Chase
Bill and Lillian Clinger
Donna Cloud
Bethanie Constant
Jim and Wendy Craig
Ed and Patricia Davis
Peg DeMallie
Richard DeMong
Andrew DePrete
John Dickinson
Winifred Dulany
Robert Eichler
Susan Eiseman
Eleanor Ellison
Catherine English
Nancy Erwin
Mary Evans
Ellen Evans
Leyda Fajardo
Jenny Gaden
Soteria Geottes
Mark Gergen and Susan Whitman
Jackson and Maria Gilbert
Beverlee Gillis
George and Niki Gliptis
Steve Goldstein and Isabelle Halley des Fontaines
Iveagh Gott
Leanne Grove
Ruth Guirard
Helen Hagen
Carol and Steven Ham
Jean Hammond
David and Lynne Hamrick
Elaine Harned
Bob and Patricia Henricks
Dick and Jane Hiss
Bruce Hobbs
Annette Hollo
Arline Hood
Bo and LizBet Hopkins
John and Susan Horner
Jim and Bobbie Hoskins
Sanford Hostetter
Beverly and Tom Iezzi
Anita Jones and Bill Wulf*
Mary Kathryn Hassett
Larry and Mary Kauzlarich
Christine Kennedy
Laura Keohane
Stephanie Kerr
Bob Knospe
Herbert and Rosemarie Koch
Betty Kuyk
Carolyn Lalley
Rohn and Connie Laudenschlager
Madelyn Lefkowitz
Patricia Lenney
Richard and Linda Smith
Charlie and Julie Stamm
Brenda Stevens
Charlie and Deborah Stewart
Spencer and Barbie Stouffer
Gregory and Anne Taylor
Sylvia Valloric
John and Eleanor Vance
Linda Verhagen
Ruth Wadlington
Virgil Wagner
Shirley Wendell
David and Arline Whitcomb
Isaac Winograd
Ron and Susan Yates
Select gifts in kind help further important work of WCBR and the WCBR Foundation. We recognize those who made a difference this fiscal year.

**Gifts In Kind**

Barbineau Brill
Nancy Bryant
Sherry Burke
Duncan and Susan Campbell
Margaret Causey
Glee Deodhar
Sue Dickler
Jenny Gaden
Samuel Gammon
Steve Goldstein and Isabelle Halley des Fontaines

Matthew Riley
Joyce Roberts
Dudley Rochester
Mary Ropka
Melissa Rose
Corky Sablinsky
Leslie Scally
Howard and Kathy Schmeltzer
Pat Schnatterly
John and Betty Scott
James Scott and Sarah Bedford
Frederic Scott
Jim and Joyce Scuffham
Cathy and Benny Sedwick
Joseph and Judith Sferrella
Sheila Sferrella
Jane Shafran
Art and Karen Sherwood
Ellen Shrum
Mary Slaughter
Dorothea Smith
Alan Snoddy
St. Rose’s Church
Erica Stein
Jeff Strider
Eleanore Sturgill
Obie Sue Thomas
John and Rauna Surr

Gary Thomas
Ross and Susan Thomas
Elaine Tola
Dave and Jan Trautman
Bob and Donna Tucker
Kenneth and Mimi Tung
Norvene Vest
Kristin Wagner
Mike and Cammie Waite
William and Marlys Walters
David Wayland
Jennifer Weaver
Kevin and Lauren Wells
Page and Peggy Williams
Everett and Betty Wilson
Karin Wittenborg
Betsy Woodard
David and Margot Youngs
Wells Fargo Community Care Grants Program

Judith Lenox
Mary Louise Maroney
Denise Lowit
John Maiolo
Lila Mait
Larry and Lynn Martin
Peter McIntosh
Robert and Monika Mentzer
Henry and Helen Minich
Andee Morford
Robert Morris
Colter Mott
Elizabeth and Gordon Mounts
Langhorne Murray
David Oakland and Nancy Takahashi
Daniel Nelson
Lindsay Nolting
Ole Osrunn
Bob and Ellen Pate
Sarah Payne Wilson
Joy Perry
Julie Perry
Mike and Cee Cee Petruncio
Dean and Mary Pollock
Reuben and Sue Rainey
Champe and Jane Ransom
Margaret Rich

Barbara Goodman
Peggy Granberry
Jim and Betsy Greene
Mary Hamrick
Peggy Harbert
Dick and Jane Hiss
Barbara Howard
Inge Hull
Jim and Diane Kingsbury
Bob Knospe
Jay Lieberman

Mary Louise Maroney
Clarke and Cheryl Norman
Michele Osborne
Dick and Judy Radt
Denny and Jane Sigloh
Mary Slaughter
Charlie and Deborah Stewart

*deceased*
WCBR FY23 Accomplishments

Strategic Plan Update

WCBR’s Strategic Plan was approved by the Board of Trustees in April 2021 and covers fiscal years 2022-2025. The Plan was developed using a vision-driven approach where a ‘Portrait of the Future,’ or vision of WCBR in 10-15 years, was created based upon research; emerging trends; data; and board, resident, and associate input. Strategic directions and initiatives were developed to cover a three- to five-year period during which the organization moves toward realizing its vision. The Senior Leadership Team has been working diligently on the Plan’s initiatives and has made great progress in two years. Our overriding vision is to be the premier Lifecare community in the region, modeled by other nonprofit CCRCs and older adult living organizations nationwide. The Plan has a total of 12 strategic initiatives; implementation has begun on nearly all, and some have been fully accomplished.

One such initiative is the development of a campus master plan (also referred to as the Campus Vision Plan). The Campus Vision Plan was developed in 2022 and has since been revised to better align with opportunities, site constraints, and economic realities. We have begun more detailed planning, called ‘schematic design,’ for the addition of independent living units to meet the growing need and interest in Lifecare at WCBR. We consider this to be Phase 1 of the Campus Vision Plan. Phase 2 will follow in future years to include the anticipated new health center. Enhancements to existing and new amenities are also being considered for Phases 1 and 2. The Campus Vision Plan is being pursued in this sequence to provide the financial capacity for the replacement of the care areas.

Another initiative involves developing a comprehensive technology plan. This year we accomplished the installation of campus-wide Wi-Fi, which is offered to residents at no cost. We are also developing a multi-year technology plan that is in the process of being finalized and has been presented to the Board.

We have also implemented and supported several programs focused on diversity, equity, inclusion, and accessibility for both associates and residents (pgs. 4-5).

For two years we have conducted the Great Place to Work Survey® (pg. 21) and are acting on survey results to support “an exemplary, engaged workforce.”

WCBR’s Board is focused on identifying meaningful indicators used to measure quality and created a Quality Committee with an initial focus on resident/patient care (pg. 22).

Our most recently completed initiative was the purchase of slightly over 50 acres of property adjacent to WCBR’s campus. Given the land purchase and the need to focus on the Campus Vision Plan, pursuit of a satellite
independent living community has been retracted.

The Board and senior leadership continue to review and discuss assumptions, and changes to internal and external factors that may impact the strategic plan’s initiatives. Our team takes seriously the responsibility of bringing WCBR’s ‘Portrait of the Future’ to fruition so that we can meet our mission to provide a Lifecare community of vibrant living designed to meet the dynamic needs and opportunities of older adults.

Great Place to Work

WCBR seeks to be the employer of choice in the Charlottesville area, so we have partnered with the Great Place To Work®. Their certification is the gold standard and recognizes employers who create outstanding employee experiences.

In the spring of 2022 (FY22), WCBR launched its first Great Place To Work® survey — and in the spring of 2023 (FY23) WCBR conducted its second annual assessment. Results were shared anonymously and in aggregate with WCBR.

The survey is delivered through 60 statements and two open-ended questions and measures engagement by assessing opinions, attitudes, and perceptions, and analyzes the level of trust between management and employees, accesses the level of pride in the work that the employees do, and rates the amount of camaraderie among colleagues.

To earn the Great Place To Work® Certification, the average score across our survey results must show that 6.5 out of 10 (65%) of associates are having a consistently positive experience at work.

In our first year, we reached 55%; and in our second year, we reached 63%. In both years “Personal Job” satisfaction, which measures how employees view their individual contributions, was the highest-ranking statement. Furthermore, 57 of the 60 statements showed an increase in score from the inaugural survey. We are pleased with this progress.

The survey also helped us identify opportunities for improvement. WCBR leadership and department leaders have engaged alongside team members to explore areas of excellence and opportunities to improve and over the last two years have begun implementing programs that build a stronger community.

We remain committed to the goal of being the employer of choice in the Charlottesville area and greatly appreciate the time given and value associates’ feedback. WCBR will conduct the Great Place to Work® survey again in the spring of 2024. Alongside each other, we will make WCBR the very best it can be!
Holleran Survey

We are always looking for ways to improve residents’ experiences. In the winter of 2022-2023 (FY23), WCBR residents across the continuum were invited to participate in a survey to measure satisfaction. The survey firm, Holleran, compiled responses and shared them in aggregate.

WCBR had a 79.6% response rate which exceeded the national average of 75%.

Independent Living received an overall satisfaction rate of 4.36 on a 5-point scale, surpassing the Holleran benchmark.

Catered Living and Vista received an overall satisfaction rate of 4.20, falling below the Holleran benchmark. However, the recommendation rate of 87.1% surpassed the Holleran benchmark. Health Care received an overall score of 4.52, surpassing the Holleran benchmark.

The WCBR Board and leadership team reviewed the full report, and departmental leaders received results for their respective teams. Teams have made short-term and long-term plans to maintain areas of excellence while improving the areas of opportunity.

Resident satisfaction is vital to fulfilling our mission and being the premier CCRC in the region. We thank all those who participated and provided feedback – you will help us improve the experience of each resident who makes WCBR their home.

For the second year in a row, WCBR residents served as pen pals to a classroom in Charlottesville’s Johnson Elementary School.

Pictured below: Peter Buchanan with his pen pal, and Mary Kathryn Hassett with her pen pal.
Community Impact

WCBR and the WCBR Foundation both play a critical role in our region’s economy. With a payroll of approximately $15 million, WCBR supports 259 full-time equivalent positions, which represents more than 300 associates employed. Furthermore, WCBR and the WCBR Foundation utilize goods and services through business-to-business activities exceeding $11 million annually. The community employs contractors, artisans, vendors, and healthcare workers who live locally. We purchase food, equipment, services and supplies from local farmers, manufacturers, providers and distributors.

As the largest contributing taxpayer in Albemarle County, WCBR pays property taxes in excess of $1.3 million annually.

Beyond economic impact, the WCBR community engages in diverse efforts to support our neighbors in other ways. WCBR works closely with local hospitals, health care and hospice providers to support and promote health. We partner with the Community Climate Collaborative (C3) to reduce emissions and enhance operational sustainability. WCBR provides the host venue for community groups, lecture series, and cultural arts events for the local community to enjoy.

Furthermore, WCBR residents and associates volunteer in their community with an immeasurable impact. For example, for the second year in a row WCBR residents served as pen pals to a classroom in Charlottesville’s Johnson Elementary School; residents and associates have participated in walks for the Alzheimer’s Association and Hospice of the Piedmont; associates and residents volunteered with the Dementia Action Alliance and many other worthwhile causes. WCBR is also pleased to be an official partner with Twice is Nice, a 501(c)(3) resale store which benefits older adults in need, through semi-annual spring and fall “cleaning” events.

Closing

The people who choose to make WCBR their home or their employer are the reasons we are a premier community. After three years of disruption caused by the COVID-19 pandemic, the need for community is greater than ever. We need each other, and we create community together. As we close our reporting on FY23, I want to take this opportunity to thank YOU for your support and dedication to the WCBR and WCBR Foundation community.

Gary Selmeczi, President and CEO
Above the Fold.

WCBR and the WCBR Foundation are proud to report another year of strong support from our donors and investment performance. We receive support from a variety of sources. We are committed to transparency, wise fiscal judgement, and sustainability.

The WCBR Foundation’s 3-year investment return as of 06/30/2023 was 7.9%. Audited financial documents are available in WCBR's Jessup Memorial Library.

*Eliminations on the following page are used to remove transactions between WCBR and WCBR Foundation for the purpose of presenting the financial statement of the enterprise.*
WCBR Foundation for the Year Ended June 30, 2023

<table>
<thead>
<tr>
<th>Corporation</th>
<th>Foundation</th>
<th>Eliminations*</th>
<th>Obligated Group</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Balance Sheet</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>$65,165,775</td>
<td>$21,715,798</td>
<td>$(28,765)</td>
</tr>
<tr>
<td>Assets Limited as to Use, Net of Current Portion</td>
<td>423,509</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Property and Equipment, Net</td>
<td>115,701,252</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Beneficial Interest in Net Assets of WCBR Foundation</td>
<td>21,784,763</td>
<td>-</td>
<td>(21,784,763)</td>
</tr>
<tr>
<td>Other Assets</td>
<td>1,604,994</td>
<td>139,284</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$204,680,293</td>
<td>$21,855,082</td>
<td>$(21,813,528)</td>
</tr>
<tr>
<td><strong>LIABILITIES AND NET ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>$5,329,902</td>
<td>$33,589</td>
<td>$(28,765)</td>
</tr>
<tr>
<td>Long-Term Debt, Less Current Maturities</td>
<td>56,696,972</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other Liabilities</td>
<td>112,998,996</td>
<td>36,730</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$175,025,870</td>
<td>$70,319</td>
<td>$(28,765)</td>
</tr>
</tbody>
</table>

| **NET ASSETS** | | | |
| Without Donor Restrictions | $15,913,691 | $8,044,031 | $(8,044,031) | $15,913,691 |
| With Donor Restrictions | | | | |
| Purpose Restrictions | 11,647,169 | 11,647,169 | (11,647,169) | 11,647,169 |
| Perpetual in Nature | 2,093,563 | 2,093,563 | (2,093,563) | 2,093,563 |
| **Total Net Assets** | 29,654,423 | 21,784,763 | (21,784,763) | 29,654,423 |
| Total Liabilities and Net Assets | $204,680,293 | $21,855,082 | $(21,813,528) | $204,721,847 |

| **Statement of Changes in Net Assets** | | | |
| Change in Net Assets | $3,491,909 | $2,730,088 | $(2,730,088) | $3,491,909 |
| Net Assets - Beginning of Year | 26,162,514 | 19,054,675 | (19,054,675) | 26,162,514 |
| **Net Assets - End of Year** | $29,654,423 | $21,784,763 | (21,784,763) | $29,654,423 |

| **Statement of Operations and Changes in Net Assets Without Donor Restrictions** | | | |
| Total Revenues, Gains, and Other Support | $44,146,754 | $672,788 | $(76,027) | $44,743,515 |
| Total Expenses | 40,627,703 | 733,083 | $(76,027) | 41,284,759 |
| Operating Income | 3,519,051 | (60,295) | - | 3,458,756 |
| Nonoperating Income (Loss) | 3,589,401 | 732,323 | - | 4,321,724 |
| Other Changes in Net Assets Without Donor Restrictions | (5,674,603) | - | (672,028) | (6,346,631) |
| **Increase in Net Assets Without Donor Restrictions** | $1,433,849 | $672,028 | $(672,028) | $1,433,849 |
Mission / Vision

**WCBR’S MISSION**
To provide a Lifecare community of vibrant living designed to meet the dynamic needs and opportunities of older adults.

**WCBR’S VISION**
Westminster-Canterbury of the Blue Ridge will be a world-class model of best practices in wellness, hospitality, and caregiving, and a leader in the field of aging.

**FOUNDATION’S MISSION**
To support, benefit, and enhance the well-being and quality of life of our residents and associates.

**FOUNDATION’S VISION**
To build and foster a vibrant community of residents and associates empowered by innovative and transformational programs that distinguish WCBR as a premiere Lifecare community.
The stories of lives changed, and programs highlighted in this annual report were made possible by donors like you. Leadership and the Foundation Board will continue to ask, to what degree and in what ways is the Foundation fulfilling its mission? To what extent are its mission and vision aligned to contribute toward the positive change we are seeking? And how can the Foundation’s impact be enhanced and target opportunities in our community?

We encourage you to read the Happenings, the Impact Report and News You Can Use, CEO Quarterly Communique, and our annual reports to stay up to date and reflect upon programs you might wish to support.

In FY23, the WCBR Foundation received the Gold Seal of Transparency from Candid/Guidestar. Your contributions are spent efficiently and deliver results. We are grateful for your support and remain committed to being good stewards and accomplishing the mission in which you have invested.

We have an open door for you. We would be delighted to talk with you about how you are changing or can change the lives of our residents and associates through philanthropic gifts while also caring for yourself, your financial goals, and your loved ones.

Thank you for all you do to make our community a great place to live, work, and thrive. Together, we enhance our shared community.

With gratitude,

Bethanie Constant, CFRE
Vice President of Mission Advancement

Contact us:
Bethanie Constant, CFRE
Vice President of Mission Advancement
Bethanie.Constant@wc-br.org
(434) 972-3281

Erica Stein
Advancement Specialist
Erica.Stein@wc-br.org
(434) 972-2574

westminstercanterbury.org/foundation/

The WCBR Foundation is a 501(c)(3) charitable organization. Your gift is tax-deductible to the fullest extent of the law.
The WCBR Gift Shop netted $12,044.13 for the benefit of the WCBR Foundation with proceeds benefitting the Health and Well-Being Across the Continuum fund. The Foundation greatly appreciates the dedication of Gift Shop volunteers who provided approximately 1,000 hours of volunteer service in FY23. Thank you!