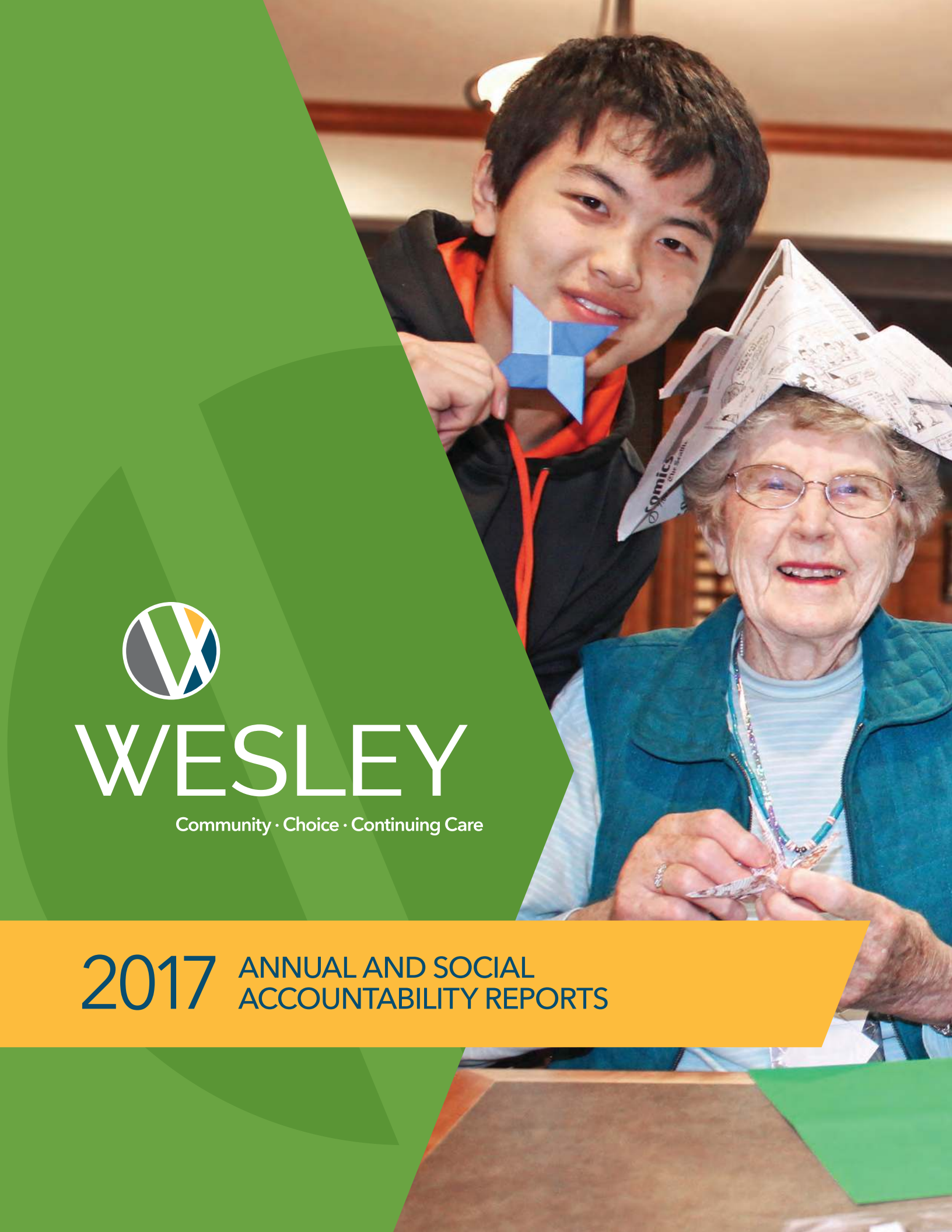




# WESLEY

Community · Choice · Continuing Care

## 2017 ANNUAL AND SOCIAL ACCOUNTABILITY REPORTS



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## A message from Kevin Anderson & Ed Rogel

We hear so much about transformation and change in today's business world, but what does this really mean? How much change does an organization need to go through to be considered transformational? Is it measured in growth or in new and innovative programs? Is it measured by a brand change? If the answer to these questions is yes, then Wesley Homes is transforming.

Our year began with the achievement of full occupancy of the Lea Hill Rehabilitation & Care Center. Construction started on Phase 1 of Bradley Park in Puyallup with the Brownstone and the Lodge. On the Des Moines campus, Phase 1A was completed, and Phase 1B construction commenced on the Brownstone and three more Cottage clusters. Planning for campuses in Bonney Lake and Renton began and continued to move forward.

Further enhancing our care choices, Community Health Services expanded their services with a certified hospice program available to all Des Moines and Auburn campus residents and all residents of King County. We also experienced continued growth in our home care and home health programs as more individuals chose to receive these services in their own homes.

The Montessori preschool education program, a joint venture between Highline Public Schools and Wesley, welcomed a new group of children. This intergenerational program has been well received by the residents of the Des Moines Health Center and the children. Our Foundation was very active in raising funds for this and many other programs and services across our organization.

Lastly, we rebranded our organization. After much thought and research, a group of residents, staff and other stakeholders worked with the JayRay team to design a new brand that better reflects who we are and can grow with us as we expand our services and communities.

We are blessed and honored to have your support as Wesley goes through this transformation. Our future is exciting, and we invite you to join us.



Kevin Anderson  
President / CEO

Ed Rogel  
Board of Trustees Chair





# The transformation of Wesley Homes

Sometimes, we just need to be rejuvenated. Other times we need a complete makeover.

Our flagship community, Wesley Des Moines, began a multi-year, multi-phase redevelopment in 2016 by remodeling the common areas of The Terrace. Today, these areas are some of the most popular on campus with Wesley U classes in the Suzanne McCarthy Education Center, alternative meals and beverages at the Rainier Bistro and holistic wellness programs in the Zenith Fitness Center.

With 2017 came the transformation of the south side of the Des Moines campus with the addition of 21 new Cottage homes, completing Phase 1A of the redevelopment. Phase 1B began to take shape with construction of the Brownstone, made up of 24 spacious apartments with underground parking. Construction also began on the last three Cottage clusters of Phase 1B. Once completed, Phase 1B will add 56 modern, independent living accommodations to the Des Moines community.

In March 2017, Wesley started construction of the Bradley Park campus in Puyallup. Future residents and ambassadors eagerly watched as the land was graded, foundations were poured and walls began to rise on the Brownstone featuring its own club room, fitness studio and 32 apartment homes. The Brownstone is scheduled to open during the summer of 2018.

The Lodge at Bradley Park started to take shape once concrete for the underground parking garage was poured and framing started on the five-story building. Completion of the Lodge is expected in early 2019.

Both campuses have been widely popular. Phase 1 in Des Moines filled quickly and now has a waiting list. Over 130 Pioneers for Bradley Park have reserved their future home and are engaged with the progress of the campus.



## Accredited hospice care from Wesley

The Wesley Hospice program received accreditation status by Accreditation Commission for Health Care (ACHC) and approval by Centers for Medicare & Medicaid Services (CMS) for the services of hospice care.

"In order to receive accreditation, Wesley Hospice met 550 individual standards and demonstrated we can sustain those best practices," said Wesley Health & Home Care Executive Director Melinda Moore. "As hospice caregivers, we are entering a patient's home at a critical period of life. It's important that, as we honor every moment of your life, your experience is one of excellence."

The addition of a hospice program has been part of the Wesley Board of Trustees' strategic plan for some time as it's an important component of our continuum of care.

"Bringing emotional and spiritual support, providing pain and symptom management, personalizing caregivers to meet your needs—

those are the things we're all entitled to for a smoother transition to end of life," said Melinda. "That's the experience Wesley Hospice provides."

Wesley Hospice services are available on both the Wesley Des Moines and Wesley Lea Hill campuses as well as in Greater King County. It is part of the Wesley Health & Home Care suite of services.

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*ACHC is a not-for-profit accreditation organization that has developed the highest national standards that providers are measured against in order to illustrate their ability to effectively and efficiently deliver quality healthcare products and services to consumers.*





## Auburn campus celebrates major milestone

Ten years ago, Wesley Lea Hill became the prototype of what all Wesley communities would be—as a campus and as a provider of services. Eby Lodge, with its esteemed Town Center, showcases a gorgeous Fireside Room, an indoor pool and hot tub, a movie theater, a chapel and numerous other amenities.

With roomy Village Homes, condo-style Brownstones, spacious residential apartments and secure memory care, nearly every residential need was met. The last major piece of the continuum, added in 2016, was the Lea Hill Rehabilitation & Care Center.

“It’s a beautiful example of everything Wesley is,” said Christine Tremain, Vice President of Marketing & Development. “Greg Byrge and his staff hosted a fitting 10-year anniversary complete with elegant refreshments, first-class hosts and a remarkable ice sculpture. The event celebrated past and present residents, their families and our friends in the greater community.”

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*“Everyone from nursing, physical therapy, housekeeping, dietary and social work were outstanding. I will recommend you to everyone.”*

WALTER BAICH

In addition to maintaining their high standards of service, the Lea Hill staff is now focused on increasing services, programs and activities. They’re working on adding more insurances for the care center, expanding menu choices, utilizing Uber services and preparing for emergencies through Community Emergency Response Teams (CERT) training and drills.

# HRIS, meet Wesley



To prepare for our continued growth, Wesley implemented a new and fully integrated time keeping, payroll and Human Resources Information System (HRIS).

“Planning for and configuring this new system was an enormous project that required collaboration across Wesley management and staff and a worldwide team of system programmers,” said Aija Stapars, Vice President of Human Resources. “The new system has a shared database, a single point of entry and a mobile application. It allows for both manager and employee self-service. Efficiencies have been gained from automating our benefits

open enrollment process and performance management. The system continues to be configured and customized for Wesley.”

The Implementation team at Wesley consisted of a project manager and a Core Team of 10 from Payroll, Finance, Human Resources and Information Technology. An additional group of 50 managers, super users and time keepers helped field initial questions from employees as Wesley transitioned to our new system.

“Teamwork, collaboration and excellence paved the way for a successful conversion,” said Aija.

## A “drumatic” approach to health



Drumming promotes feelings of well-being, provides a cardio workout and encourages us to access both hemispheres of our brains. That’s why Wesley created “Drum For the Health of It!”, a resident-based drumming group funded by Wesley Community Foundation.

“The holistic benefits of group drumming have been well studied and documented,” said Wesley’s Music Therapy Coordinator Leslie Lehnhoff. “Research supports music-making in general and specifically group drumming.”

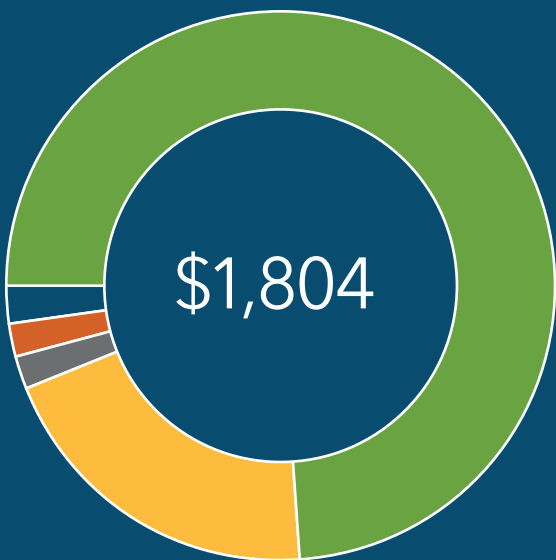
Many people cannot or do not want to engage with other music groups. Choirs or hand bells require an ability to read music, but drumming group participants don’t need to read music. The drum circle facilitator provides all necessary instruction, demonstration and mentoring so that all residents are able to make rhythms on their drums. Drum circles are a fun and powerful way to bring individuals together through music.



# Wesley & Subsidiaries

Including Wesley Homes Des Moines, Wesley Homes Lea Hill, Wesley Homes Bradley Park, Wesley Homes Foundation and Wesley Homes Community Health Services.

## Funds your Gifts Supported



- 74 percent Capital Investment
- 20 percent Greatest Need
- 2 percent Circle of Concern
- 2 percent Other
- 2 percent Endowment

**97** percent of residents would recommend Wesley as a place to live

## Statement of Operations

Income Statement for the year ended December 31, 2017

<b>Unrestricted</b>	<b>(in thousands)</b>
Operating Revenue	\$45,246
Operating Expenses	\$48,049
Operating Income	(\$2,803)
All Other Unrestricted Activity	\$3,877
Change in Unrestricted Net Assets	\$1,074
Change in Temporarily Restricted Net Assets	\$1,417
Change in Permanently Restricted Net Assets	\$30
<b>Change in Net Assets</b>	<b>\$2,521</b>

## Statement of Financial Position

Balance Sheet as of December 31, 2017

<b>Assets</b>	<b>(in thousands)</b>
Cash and Unrestricted Investments	\$29,009
Restricted Investments	\$32,179
Property and Equipment	\$107,305
Other Assets	\$5,606
<b>Total Assets</b>	<b>\$174,099</b>

<b>Liabilities &amp; Net Assets</b>	<b>(in thousands)</b>
Accounts Payable and Accrued Expenses	\$8,928
Resident Entrance Fees	\$29,799
Annuities Payable	\$897
Loans and Mortgages	\$103,973
<b>Total Liabilities</b>	<b>\$143,597</b>
<b>Net Assets</b>	<b>\$30,502</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$174,099</b>

The portions of operating expenses spent on administrative and fundraising for Wesley Homes and its subsidiaries were 21.31 percent and 1.57 percent respectively.

Wesley Homes financial highlights are presented for convenience and information purposes. A copy of the audited financial statements will be provided upon request.

# Lifetime Giving Societies

The Lifetime Giving Societies recognize the cumulative contributions of donors.

## Century Circle \$1 million and above

Estate of  
Robert Trimble  
Estate of  
Grace Wilson

## \$500,000 or more

Anonymous  
Estate of Kenneth T.  
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## \$250,000 or more

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Barbara Just  
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Ruth M. Kenyon  
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Noriko Lao  
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Walter W. Liang  
Frank and  
Ann Lindeke  
Howell Lowe  
Lawrence and  
Carol Malcom  
Paul and Joanne Marr  
Shirley M. Martinsen  
Albert Maurich  
Shannon McCarthy  
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McConnell  
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Louise Wadsworth  
Wesley's Des Moines  
Needle Crafters  
Linda and Phil Yates  
Joan and  
Martin Zatloukal

## Stanley Logan Club

The Stanley Logan Club recognizes the annual contributions of donors totaling \$1,000 or more in a calendar year. These gifts support initiatives, such as resident and staff programs, resident and staff assistance, capital campaigns and greatest needs.

### \$100,000 and above

Barbara May Walker  
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John Nitardy  
The Taxpayers of  
Washington State  
Jack Wimpress

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Absher Kid's Cup  
Golf Tournament  
with Apple  
Physical Therapy  
Ray and Deanna Dally  
GE Foundation  
Gloria Helms  
Marie Neifert

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Gretchen Frederick  
Sally and  
Richard Hanna  
Margot and  
Paul Hightower

Kert Kertson and  
Norma Lee Smith  
Marilyn Knutson  
Eloise Lauritsen  
Shannon McCarthy  
and William Wiley  
Susan Fritts  
McConnell  
Everett Rightmire  
Karen Satterberg  
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# Legacy Society

Legacy Society members have made a deferred gift commitment to support Wesley's communities or programs.

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Mary Bruce	Corinne Garland	Marion Kline	Lillian Perks	Edwin and Marian Towle	Joan and Martin Zatloukal
Elizabeth Buford	Richard Garrity	Robert and Evelyn Klopfenstein	Enola Peters	Christine Tremain	Gregory Zimmer
Faith C. Callahan	Will and Betty Gering	Beverly Klose	Iris Pournarus	Robert Trimble	
Arthur and Peggy Campbell	Earl and Gertrude Gish	Esther Knell	Dan and Jane Pryor	Estate of Merna Trowbridge	
Marshall Campbell	James and Betty Hall	Gertrude Knight	Margaret and William Race	Jack and Marjorie Tuell	
Colleen and William Castner	Kathrine Hansen	Mary Kohli	Charles Reagen	Margaret Tuter	
Paul and Lee-Lee Castor	Robert Hargis, Sr.	Noriko Lao	Estate of Helen and Ralph Reed		
Will and Priscilla Clardy		Eloise and James Lauritsen	Estate of Helen and Ralph Reed		
		Norman and Lola Lawson	Sadie Register		
		Mildred Leberg	Adelle Rennord		
			M. June Ross		
			James and Carol Russell		



Every gift is greatly appreciated, and every effort has been made to ensure the accuracy of this listing. We apologize for any errors and ask that you report omissions or corrections to the Foundation office at (206) 870-1334.

**100** percent of residents feel safe and secure at Wesley



# Employee Stakeholders

Wesley employees who gave to our Culture of Philanthropy in 2017.

Anonymous (11)  
May Abelita  
Alicia Acayan  
Veronica Aceves  
Maria Alagos  
Jason Alcorn  
Deanna Allen  
Kevin Anderson  
Angel Anholt  
Asarassh Araya  
Shelly Armond  
Darlajeanne Arrington  
Katie Arrington  
Lavon Attix Bowman  
Ajonye Ayume  
Carl Ball  
Felicidad Barbosa  
Gloria Barrientos  
Almaz Baruda  
Angela Battle  
Romana Baydak  
McKenna Berkley  
Karen Bjelland  
Dennis Blanco  
Jenna Blegen  
Jamilyn Bloodworth  
Enatihun Bogale  
Kelsea Boggs  
Martin Brady  
Marisel Briggs  
Ebony Brinson  
Tina Brown  
John Burdine  
Alicia Butler  
Greg Byrge

Mujdat Calfos  
Brigitte Caluza  
Alex Candalla  
Charles Chalfant  
James Chastain  
Laurel Christensen  
Katherine Coleman  
Theresa Conner  
Jorge Covarrubias  
Malama Crichton  
Sten Crissey  
Doris Crowe  
Christina Davison  
Roger Dean  
Bernie Dorsey  
Brenda Drinkwine  
Boi Dun  
Jesse Dykshoorn  
Doris Evans  
Joanie Farley  
Margaret Farr  
Marlene Feliciano  
Robert Ivan Figueroa  
Mekides Fonja  
Julie Fraser  
Maria Frias  
Czarlon Galapon  
Maria Garcia  
Alice Gathere  
Jayna Geier  
Dawn Genzlinger  
Janet Grant  
Herbert Green  
Elizabeth Guessow  
Edna Halcon  
Douglas Hanson

Jennifer Hanson  
Frank Harding  
Erin Herringshaw  
Theresa Hile  
Ebony Hinkson  
James Hsu  
Donna Hyder  
Farzana Ibrahim  
Holly Isaman  
Lisa Ivie  
Dorcus Jack  
Marimirca Jean-Baptiste  
Kayla Jensen  
Sandra Johnson  
Brittney Johnson  
Douglas Johnson  
Kjersti Johnson  
Linda Johnson  
Miriam Kamau  
Liana Kamyshina  
Michele Karnes  
Peggy Kerns  
Chris Kinkade  
Catherine Kinuthia  
Rachel Kirkman  
Shawn Kirkpatrick  
Marlene Knoppi  
Jennifer Knox  
DeVona Lahrman  
Rita Lambert  
Rob Lanouette  
Stacey Lanske  
Jeannine Lee  
Leslie Lehnhoff  
Jarrett LeMasters

Luis Lemus Rodriguez  
Nadette Lewis  
Christina Lewis  
Ashley Line  
Sheryl Mackie  
La Vonne Mahugh  
Lonica Mahugh  
Parmjeet Malhi  
Alla Mamikonyan  
Joveyn Mancera  
Jansen Mangaya-Ay  
Mary Marcotte  
Maria Martija-Harris  
Fikerte Maru  
Caron Massingale  
Jason Massingale  
Luzvilla Mata  
Sharon McClain  
Susan McConnell  
Claria McCoy  
James McGuire  
Christina McNeilly  
Wandee McNett  
Michelle Meeker  
Rupa Mehra  
Lisa Meinecke  
Melkie Mengistu  
Lawrencia Mensah  
Audrey Mills  
Melinda Moore  
Stuart Moore  
William Morgan  
Sarah Mwangi  
Kulvinder Nagra  
Laura Nencetti  
Ryan Niemi

Gladis Ochoa  
Kaili Ogeto  
Halid Okanovic  
Jean Olson  
Mable Otinga  
Deborah Palmer  
Stella Pasion  
Tryphena Peters  
Deanne Petershagen  
Gina Popich-Timmons  
Naniofa Poulivaati-Mounga  
Dillon Pyle  
Syed Rashid  
Valerie Rawlinson  
Carissa Regaspi  
Nagel Regaspi  
Noel Regaspi  
Janet Richardson  
Julie Rivera  
Michelle Rivers  
Rasty Roque  
Roberta Russell  
Veronique Sallutal  
Diane Salwey  
Agustin Sanchez  
Karen Satterberg  
Tina Sayachack  
Leah Scanson  
Ruben Sepulveda  
Fatima Sesay  
Brian Simmons  
Megan Simmons  
Patti Singleton  
Marlene Slee

Joanne Smith  
J. David Snow  
Nezerlyn Sofranes  
Diane Spencer  
Aija Stapars  
Lynn Stapleton  
Michael Steiner  
Stephanie Sunde  
Theresa Taylor  
Beteliem Teshome  
Jemimah Thairo  
Christine Tremain  
Stewart Tremain  
Florence Turcotte  
Ronald Turner  
Gerri Tyson  
Christina Valenzuela  
Princess Vann  
Audra Vasquez  
Mary Ann Vassar  
Alice Wainaina  
Robert Waitt  
Betha Wanjiku  
Mary Warden  
Sokly White  
Susan Wicks  
Christyn Williams  
Justin Withrow  
Trinity Witt  
Colleen Wojciechowski  
Virginia Yacas  
Jim Yamamoto  
Angela Ylenni  
Laurel Youngstrom





# WESLEY

Community · Choice · Continuing Care



## 2017 SOCIAL ACCOUNTABILITY REPORT

*"The only ones among you  
who will be really happy are  
those who will have sought  
and found how to serve."*

**ALBERT SCHWEITZER**



## Committing to our employees

Wesley could not provide outstanding service to residents without our dedicated staff.

In 2017, Wesley Community Foundation distributed 23 emergency grants to staff that needed help during a crisis. We also provided eight education grants to staff to increase their skills, which will help improve their economic well-being and physical health.

The Foundation was also able to sponsor two Leadership Academy trainees. The academy is a year-long leadership development program designed to enhance the leadership skills and core competencies of nonprofit leaders within the LeadingAge membership.



## Subsidizing Care

Wesley's support of residents, employees and the greater community provides a significant contribution to the areas where we live and work. These actions by Wesley are voluntary, are above and beyond what is required by law and are representative of our mission to serve others.

The Bishop McConnell Scholarship Program provided almost \$250,000 in subsidies to 21 qualifying residents, allowing them to live at Wesley and receive care as needed.

Wesley Community Foundation raised funds for the Des Moines and Lea Hill Circle of Concern endowments, which help provide support for qualifying Wesley residents who have exhausted their resources through no fault of their own. Residents, family and friends also financially supported this program through the on-campus thrift stores and the Resident Bake Sale on the Des Moines campus. The Circle of Concern program provided just under \$200,000 in subsidies.

When Medicaid reimbursements fell short for long-term care residents of Wesley Des Moines Health Center, Wesley Lea Hill Rehabilitation & Care Center and Wesley Health & Home Care, Wesley absorbed this shortfall of over \$3.2 million.

Our community programs generate goodwill and positively affect our reputation, credibility and support. However, we do these things because our mission guides us to give back to the communities where we live and work. It is the right thing to do.

### Value of Community Benefit and Subsidies

Community Involvement	\$6,210
Meeting Space	\$68,472
Community Programs offered on our campuses	\$186,504
Education	\$17,198
Community Benefit (subtotal)	\$278,384
Reduced Rent, Subsidized Care and Assistance	\$481,447
Medicaid shortfall	\$3,245,778
<b>Total</b>	<b>\$4,005,609</b>





## Benefits beyond calculation



**Highline Montessori  
at Wesley Homes**

*An Intergenerational Program*

As Wesley transforms as an organization, our focus on community good is still a strong component of our mission. Our commitment to help improve the greater community is woven into the fabric of Wesley,

and we are able to do this because of the enthusiasm of our volunteers and supporters.

Wesley worked with Highline Public Schools to create the unique **Highline Montessori at Wesley Homes**. Four-year-old children attend this educational program four days a week in the Wesley Des Moines Health Center, where they develop foundational skills, experience hands-on learning and acquire collaborative play skills.

Wesley residents volunteer to interact and foster intergenerational learning for the children.

“Residents at Wesley get so much joy from being around our energetic preschool children,” said Community Foundation Executive Director Susan McConnell, “and our preschool children absolutely love doing projects, reading, planting flowers and doing a variety of other activities with their school ‘grandparents.’”

Sometimes we get very isolated within our own generation. It’s very important to have an intergenerational mix. Everyone teaches each other something. The positive results for all are immeasurable.

Both Wesley Des Moines and Highline College entered into periods of transformation and needed housing solutions. Wesley is replacing The Gardens building but still needed to fill those short-term vacancies. Highline College needed short-term student housing.





Collaborating to find a solution, the partners created the Students-in-Residence program, a multigenerational program that has positive impacts on both the Des Moines campus residents and the five inaugural Highline College students.

"This is such a distinctive program," said Director of Sales and Community Relations Lynn Stapleton. "Students at Highline College are living on our Des Moines campus and interacting with residents by volunteering. It's a win-win for both Highline and Wesley."

The Lea Hill campus continues to support the greater Auburn community with a diverse calendar of activities, including blood drives, event sponsorships and opening its doors to other non-profit organizations.

"We still have kids using our pool for therapy through Children's Therapy Center," said Executive Director Greg Byrge. "They even increased their program to two mornings each week. Supporting our neighbors in this way is really important."

Wesley Lea Hill continues to sponsor the Nexus Youth and Families Breakfast. Previously known

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*"I continue to be so impressed with the compassion and commitment of the staff, the beautiful accessible accommodations, and the delicious and appealing food choices. It's easy for me to understand why my parents were so happy living at Wesley."*

**ELIZABETH A. WILLIAMS**

as Auburn Youth Resources, Nexus has become a regional provider of youth outreach, mental health counseling, shelter and other services. Wesley is honored to be able to help serve the children, youth and families of South King and Northern Pierce Counties.

Wesley U continues to thrive, and Wesley Community Foundation supplemented the cost of the program—for Wesley residents and for people from the greater community.

## Wesley Executive Leadership

Kevin Anderson  
President/CEO

Greg Byrge  
Executive Director, Lea Hill

Alex Candalla  
Executive Director, Des Moines

Jesse Dykshoorn  
VP Information Technology

Susan McConnell  
Executive Director, Foundation

Melinda Moore  
Executive Director, Health & Home Care

Aija Stapars  
VP Human Resources

Christine Tremain  
VP Marketing & Development

Jim Yamamoto  
VP Finance



# WESLEY

Community · Choice · Continuing Care

815 South 216th Street  
Des Moines, WA 98198

**WesleyChoice.org**

Toll-free: 1-(866) WESLEY-O  
1-(866) 937-5390

Wesley is a not-for-profit organization offering a full spectrum of lifestyle options for aging well, including residential communities, in-home health and care services in King and Pierce counties.

