



WESLEY

Community · Choice · Continuing Care

2022 ANNUAL REPORT LIVING THE MISSION REPORT



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A message from Kevin Anderson & Joe Harmon

Reflecting on 2022, there were many exciting developments that happened at Wesley!

Construction of the Des Moines Phase III redevelopment continued on budget and on time with a scheduled opening first quarter of 2024. This last phase has new Cottages, a new five-story wing with independent, Catered Living and memory care apartments and a new two-story care center with private suites.

We celebrated our 15th anniversary at Lea Hill in Auburn and our first anniversary at Tehaleh in Bonney Lake. After four years of operation, Bradley Park in Puyallup began planning for its second phase of development. Phase II includes a new Brownstone, the Barndt Family Rehabilitation & Care Center, additional parking, a swimming pool and more amenities.

Based on constituent research, the Board adopted new mission, vision and values statements, and we launched Club YES, a program that says YES to living the life you choose at Wesley. Whether that means attending Wesley U classes, playing pickleball, or working in the woodshop, you can retire the way you want at Wesley.

So many of these amenities were funded through Wesley Community Foundation. Your support makes a big difference. A very special enhancement to the Des Moines campus was the new meditation garden, designed by Al Kubota and funded largely by a generous donation from the Hasegawa family.

Staffing has been challenging nationwide, so we implemented programs to improve the employee experience. We offered training programs to help managers be better people managers; we launched Inspire, our positive and meaningful employee recognition program; and we continued our Lean journey, increasing employee participation in changing how work gets completed. By doing so, we saw more people want to work for Wesley. Employee retention increased, and turnover dramatically decreased.

We are excited about the future. As you read this report, you'll understand why. We welcome you to join us and say YES to Wesley!



WESLEY

Community · Choice · Continuing Care

Kevin Anderson
President / CEO

Joe Harmon
Board of Trustees Chair



A thrilling year for Wesley

Plans and celebrations happened at all Wesley communities, making for a thrilling 2022!

From pre-construction and framing work to choosing residences and finishes, Phase III of the Wesley Des Moines redevelopment had everyone excited.

Construction began on 11 Cottages, 18 Centre Point apartments on the fifth floor, 50 Commons apartments with Catered Living services, 26 apartments in the Albert W. Carr Memory Care Center and 72 suites in the Wesley Des Moines Rehabilitation & Care Center. The new building will also offer a new fitness center with a state-of-the-art swimming pavilion and a skywalk spanning the street between The Gardens and The Terrace.

Ice cream socials. Musical events. Culinary delights. Friends. Our Wesley Lea Hill campus was treated to beautiful weather as they celebrated 15 years of community with love and fun.

The anniversary year was also the perfect time for the community to sustain close to 100% occupancy, an enviable position for most senior living communities.

Plans for Phase II of Wesley Bradley Park were submitted to the City of Puyallup for review. This phase of development includes the Barndt Family Rehabilitation & Care Center, a swimming pool and an additional Brownstone building with 45 apartments, underground parking, community gathering space, raised gardens and a BBQ area.

Additionally, we submitted plans to the Department of Health for licensing the care center. This step is required to operate the care center and could take a year or more. We estimate construction can begin in the second half of 2023 with an opening early 2025.

Planning for Wesley Spring Glen, our long-awaited development in the Fairwood neighborhood of Renton, started back up at full steam.

Wesley Spring Glen is a partnership with Nativity Lutheran Church, the first of its kind in Washington State. Plans include a shared sanctuary/community space and offices and meeting areas for church staff. Groundbreaking is scheduled for 2023 pending King County approval and permitting.

Continued on page 4



"We really like Wesley because it is faith based. The fact that you have pastors and chapel speaks volumes to us. Community is so essential for many reasons, especially in our postmodern world."

JUDY WHISMAN, PRIORITY RESERVATION LIST MEMBER

Construction is estimated to be complete in early 2026.

Following the opening of The Arbor memory care in March, Wesley at Tehaleh celebrated the community's first anniversary with music, tours, ice cream and delicious cuisine prepared by Morrison's culinary team. Residents and staff brought their festive moods as they showcased their beautiful community nestled in "the land above."

For many employers, the pandemic created a work environment where daily activity was reactive to federal, state and local changes leaving little time for proactive people strategies. However, people strategies at Wesley continued to grow with a new focus on the employee experience.

Wesley partnered with the Society for Human Resources Management to invest in our leaders through the People Manager Qualification (PMQ) program. This partnership gave managers access to modern, interactive leadership development content to facilitate a high level of manager effectiveness through the mission. Thirty Wesley leaders earned the PMQ certification.

The HR team led Wesley's inaugural Leadership Summit. Nearly 50 leaders participated in the all-day session, which included *Difficult Conversations*, *Resilience*, *Managing Change*, *Active Listening* and the *Belonging Model* - a framework that creates an

employee experience of connection, security and community. The session was partially funded by Wesley Community Foundation.

Wesley launched Inspire, a best-in-class social recognition and reward program built on the science of belonging. Employees recognize each other, sign special e-cards and nominate coworkers for the monthly Lean Champion and Resident Champion awards. Employees earn points that can be redeemed in the reward catalog for merchandise, gift cards and more. Inspire allows the good work done anywhere to be known everywhere!



As evidenced by improvements to retention, investments in the employee experience have proven to be well-received and impactful to our mission.

"Wesley's people strategies will continue to be grounded in the belief that the workplace is what we make of it."

NEAL MARTINO, VP HUMAN RESOURCES



Empowered for growth

With more Wesley communities on the way, it was even more important that staff embraced Lean. Significant strides were made to streamline the organization.

Over \$280,000 of staff hours and cost savings were realized by empowering staff to identify opportunities for improvement and propose change. Process improvements included digital onboarding for new employees, reducing agency aide hours and moving to cloud-based software.

The Health & Home Care (H&HC) team also addressed processes. A director of business operations was hired to centralize the intake of new clients and billing operations. This addition had a major impact on the team's ability to collect bad debt.

H&HC focused on vertical integration with community wellness nurses. Now over 50% of H&HC's clients are Wesley residents.

Other changes included adding in-home visits by the Palliative Care physician and focusing on recruiting qualified nursing staff, which is where the employee experience proved to be key.

"It's word of mouth," said H&HC Executive Director Melinda Moore. "Wesley is a great place to work. Our biggest recruiter is our staff."

Reflection and serenity



Gardens have been such an important feature of Wesley Des Moines that the first apartment building was called "Wesley Gardens". Wesley Community Foundation continued the tradition of having serene garden spaces for residents to enjoy.

A meditation garden was the desired outcome. Who better to create this for Wesley than the renowned Al Kubota? His father, Fujitaro Kubota, created the 20-acre Kubota Gardens in Seattle. Al assisted his father ever since he could hold a shovel and shares the same passion in creating gardens. With Al's guidance, suitable land was identified near The Gardens apartments, and construction began on this haven of tranquility.

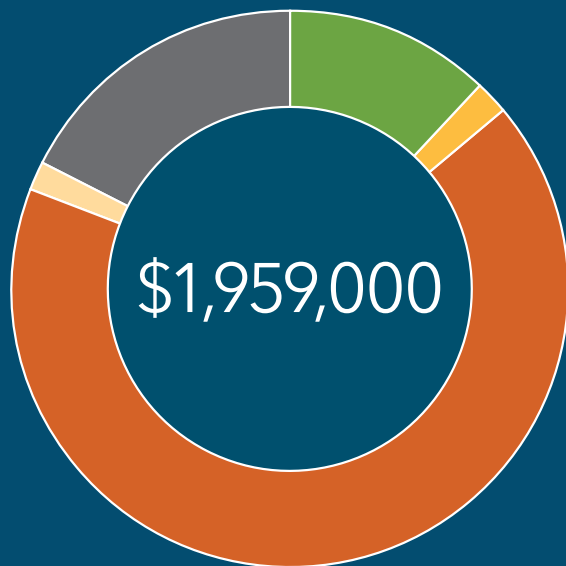
The garden represents different things: it brings opportunities for meditation, reflection, respite and prayer, as well as joy and peace. Gardens are intrinsically linked to peacefulness and reflection, though they are teeming with life. Included are short walking paths, a water feature, sitting boulders, benches and beautiful trees. The garden's transitions throughout the season will be a joy to watch.






Thanks to generous gifts by their daughters, the new garden has been named the **Anna and Harry Hasegawa Meditation Garden** in honor of these longtime residents. We are grateful for the Hasegawa family's support in bringing this beautiful garden to life for all to enjoy.

Wesley & Subsidiaries

Including Wesley Des Moines, Wesley Lea Hill, Wesley Bradley Park, Wesley at Tehaleh, Wesley Community Foundation and Wesley Health & Home Care

Funds Your Gifts Supported



	Greatest Need	12.04%
	Circle of Concern	2.01%
	Capital Investment	66.82%
	Endowment	1.80%
	Other	17.33%



Statement of Operations

Income Statement for the year ended December 31, 2022

Unrestricted	(in thousands)
Operating Revenue	\$71,906
Operating Expenses	\$88,529
Operating Income	(\$16,623)
All Other Unrestricted Activity	(\$7,324)
Change in Unrestricted Net Assets	(\$23,947)
Change in Donor Restricted Net Assets	\$49
Change in Net Assets	(\$23,898)

Statement of Financial Position

Balance Sheet as of December 31, 2022

Assets	(in thousands)
Cash and Unrestricted Investments	\$35,637
Restricted Investments	\$45,683
Property and Equipment	\$330,888
Other Assets	\$15,454
Total Assets	\$427,662
Liabilities & Net Assets	(in thousands)
Accounts Payable and Accrued Expenses	\$17,389
Resident Entrance Fees	\$100,641
Annuities Payable	\$610
Loans and Mortgages	\$292,769
Total Liabilities	\$411,409
Net Assets	\$16,253
Total Liabilities & Net Assets	\$427,662

The portions of operating expenses spent on administrative and fundraising for Wesley Homes and its subsidiaries were 6.4% and 1% respectively.

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

The highlights presented here include the partnership between Wesley Homes and Presbyterian Homes & Services for Wesley at Tehaleh.

Lifetime Giving Societies

The Lifetime Giving Societies recognize the cumulative contributions of donors.

Century Circle Lifetime Giving of \$100,000 and above

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Wesley Health & Home Care
Diane Whipple
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The Lifetime Giving Societies: Cornerstone Society, continued

Edwin and Marian Towle	Louise Wadsworth Margaret Wainscott	Don and Mary Jane Wasson	Wesley Needle Crafters	Robert Witman Colleen	Linda and Phil Yates Joan and Martin
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Anna Vander Pol	Washington Federal Foundation			Kenneth Worthington	Anonymous (4)
				Jim Yamamoto	

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.

Kevin and Barb Anderson	Ralph and Barbara Centioli	Elaine and Gene Haugen	Walter Liang	Richard and Katherine Paul	John and Elaine Stamm
Anonymous	Diane Collier	Eric and Mary Holdeman	Mike and Willa Link	Alice Pohl and Richard Baker	Blythe and Edmund Stanton
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	Betsy Hasegawa	Ann Lewis			
	Ellen Hasegawa				
	Bruning				

Legacy Society

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

Kevin and Barb Anderson	Ralph and Louise Black	Will and Priscilla Clardy	Will and Betty Gering	Ruth M. Kenyon	Pamela McCarthy
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			Ray Kanemori		

Continued on page 9

The Legacy Society, continued

James and Carol Russell	Paul and Onalee Schneider	Mildred Smith Barry Smith	Corinne Spicer Edmund and Blythe Stanton	Lois E. Svinth Marlys Tron	Joan and Martin Zatloukal
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Dorothy Schepcke	Paul and Kim Smith				

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We gratefully recognize these estate gifts of \$10,000 and above.

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Levi T. Lovelace	Josephine St. Jean	
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Corporate Matching Gifts

The Boeing Company Gift Matching Program
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All gifts are 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.

Employee Stakeholders

Wesley employees who gave to our Culture of Philanthropy in 2022.

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2022 LIVING THE MISSION REPORT



Stepping up after the pandemic

One of our most popular ways of giving back is Wesley U, sponsored by Wesley Community Foundation. This program served over 399 older adults with 144 online, in-person and hybrid classes.

We began to open our meeting rooms to other nonprofits. Delta Kappa Gamma, an international organization that promotes the personal and professional growth of women educators, met several times at Wesley Lea Hill. P.E.O., a group that celebrates, educates and motivates women to achieve, also met at Lea Hill.

Residents at Lea Hill contributed to the Auburn community, too. The Lea Hill Quilters made 150 quilts for foster kids at Wishing Well. They also made 20 quilts for residents at the Lea Hill Rehabilitation & Care Center. Resident giving continued as they joined the Walk to End Alzheimer's.

The Market at the Bonney Lake Food Bank received over \$500 worth of non-perishable food from residents, staff and guests at Wesley at Tehaleh. This equaled four large bins and three boxes of food donations.

During the holidays, residents and staff at Wesley Bradley Park collected 239 lbs. of non-perishable food for the Puyallup Food Bank.

Wesley Des Moines supported Sealife Response + Rehab + Rescue through Sea Pup Patrol. The organization helps first responders provide marine-themed stuffed animals to children in crisis and helps protect sea life.

Tuition-free Bezos Academy held its second year of Montessori-inspired classes on the Des Moines campus. Resident volunteers are an intrinsic thread in the fabric of the early education of the children. They are also an important part of intergenerational programs at all Wesley communities.

"Those who are happiest are those who do the most for others."

BOOKER T. WASHINGTON



Support when it's needed

By providing residences, nutritious meals and community, Wesley caringly affects the health and welfare of older adults. We stayed true to our purpose and helped residents and staff when needed, including 24 emergency grants and 4 education grants for employees and the leadership training. The efforts of the Living the Mission team and residents continued to positively impact the greater community on and off Wesley's campuses.

For 18 residents at Wesley Des Moines, the income-based Bishop McConnell Scholarship Program provided \$267,491 in subsidies, allowing these residents to live at Wesley and receive support and care.

Wesley Community Foundation raised funds for the Des Moines, Lea Hill and Bradley Park Circle of Concern Endowments that helped support qualifying residents who exhausted their financial resources through no fault of their own. The Circle of Concern fund provided \$276,197 in subsidies to 12 qualifying Wesley residents.

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 \$925,000.

Value of Community Benefit and Subsidies

Community Involvement	\$34,348
Meeting Space	\$12,488
Education	\$27,967
Community Benefits (subtotal)	\$74,803
Reduced Rent, Subsidized Care and Assistance	\$831,919
Medicaid shortfall	\$925,000
Total	\$1,831,722



A mission for today and the future? **yes**

In 2022, Wesley's Board of Trustees adopted new mission, vision and values statements.

Dick Jobst, Home Health Board member and former trustee, spearheaded the work to revise and restate Wesley's mission, vision and values. To learn more about Wesley's culture, Dick interviewed residents and staff at all of Wesley's campuses. Marketing survey data from over 400 stakeholders, also used to create the new Club YES campaign, provided key insight. The end result clearly defines Wesley's culture and provides important direction for the organization for years to come.

All statements are posted on Wesley's website under About Us.

MISSION

Inspired by and grounded in faith, Wesley

enriches the lives

of older adults through
COMMUNITY, CHOICE
and **CONTINUING CARE.**

Wesley Executive Leadership

Kevin Anderson
President/CEO

Mark Hanson
Executive Director, Lea Hill

Kevin Lang
VP Information Technology

Marysusan Iotte
Campus Administrator, Tehaleh

Neal Martino
VP Human Resources

Joni Mauritz
Executive Director, Des Moines

Susan McConnell
Executive Director, Community Foundation

Melinda Moore
Executive Director, Health & Home Care

Christine Tremain
VP Marketing & Development

AeJeanna VanSapp-Rodriguez
Director, Lean Systems

Karen Williams
Campus Administrator, Bradley Park

Jim Yamamoto
VP Finance

WesleyChoice.org



WESLEY

Community · Choice · Continuing Care

18000 72nd Avenue South, Suite 217

Kent, WA 98032

(206) 870-1260

Wesley is a faith-based, nonprofit organization offering a full spectrum of lifestyle options for aging well, including residential communities and in-home health services in King and Pierce counties.

