



UMC FOUNDATION
Abundant Life for Seniors



A Celebration
of *Innovation*



OUR 2024 VIRTUAL EVENT



- Over **\$100,000 was raised to benefit our UMC communities** - a significant increase from the 2023 virtual gala. This total is largely comprised of sponsorships from our longtime, dedicated business partners, but also some teammates, residents, and local supporters. Our top sponsors were Sweetwater Construction Corp., Hawks & Company, Lockton, and Sodexo and I have gala graphics we could repurpose if needed.



- Over **1,400 people viewed the program on Facebook or YouTube**. This is an increase of almost 1,000 from the 2023 virtual gala.



- For the first time, approximately **10 million media impressions were gained** for UMC, the UMC Foundation, and our sponsors through pro bono and low-cost advertising.

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A Celebration of Innovation

United Methodist Communities and the United Methodist Communities Foundation's shared commitment to innovation is one of the keys to our continual development and improvement. While UMC is an entity grounded in Methodist and Wesleyan roots, this rich history is a fertile ground for the seeds of advancement. It is the special and unique heritage of UMC Foundation that motivates us toward a commitment to a brighter future of even better care.

In an environment of constant change, adaptability is essential. We strive to hone our processes and approaches to provide optimal care. Embracing innovation and partnership helps us to ensure continuous growth and to meet the evolving needs of our residents, clients, and their family members, as well as our teammates and service partners.

Innovation involves both daily care and big-picture organizational approaches. As a system, UMC has made significant progress in applying new safety measures, reshaping the approach to informational sharing, and exploring recent breakthroughs in artificial intelligence (AI).

But innovation isn't just about implementing more technology and AI. It also directly relates to how an organization develops and improves its resources through collaboration and creativity. Together, UMC and the UMC Foundation have intentionally incorporated greater diversity in their teams, which allows for new perspectives in operations, care, and fundraising. Through innovation, we have been able to shift conversations surrounding the future from surviving to thriving as a leading senior living provider.

The talented UMC team, under the leadership of visionaries like CEO Mark Lenhard and CIO and Vice President of Innovation Travis Gleinig, the dedicated members of the Board of Directors and Foundation Board of Trustees, are all committed to driving the process of innovation forward. We eagerly anticipate how our successes will positively impact the lives of those who call UMC home.



Innovation

TECHNOLOGY INCREASES ROOM SAFETY

Thanks to innovative fall technology from Safely You, The Shores and Collingswood Manor are safer than ever. The next generation AI care companion is installed in the rooms of seniors who consent and when activated, alerts staff whenever a senior falls.

At Collingswood there is 100% Safely You participation among Tapestries residents, and the technology has increased peace of mind for families.

Leslie Woehr Tuttle's mother, Mindell, is a resident of Tapestries at Collingswood Manor, and Mindell falls often. Prior to moving her to Collingswood, Leslie had to put bells on her mother's walker to try to monitor her movements.

"The fall technology was one reason we came to look at the facility," Leslie shared. "We were so impressed."

"Now we can analyze what causes the falls," she said. "At one point, we saw that by just moving her dresser back a bit, we could eliminate some of her falls."

Paul Stridick's mother, Gloria, is also a resident of Tapestries. A fall at home solidified the family's decision to move her to Collingswood quicker than expected.

"The staff is very considerate and compassionate," Paul said. "The fall technology is just another tool in their toolbox to help them."

Staff respond to falls within an average of one minute and 30 seconds. For residents like Mindell and Gloria, Safely You has created a safer environment, allows for greater communication with families, and provides a great sense of peace of mind for all.



COMMUNITY BENEFIT

**Compassionately serving in community
so that all are free to choose Abundant Life.**

Community Benefit or Social Accountability is a way for non-profit organizations to impact the local community by providing access to various programs aimed at improving health and well-being and demonstrating an organization's commitment to the greater good. Health care facilities, housing communities and home care providers have the resources to impact neighboring communities, and as a non-profit organization, United Methodist Communities, UMC, shares willingly and generously of its time and talent to accomplish this.

Community benefit is exhibited in many ways and on many fronts across the state. UMC hosts hundreds of interns, offers its campuses to the public, works with universities, corporations and special schools and expresses appreciation to local agencies, first responders and more.

THE VALUE OF COMMUNITY BENEFIT FOR 2024:

UMC's Gift of Care: \$2,662,000

(The annual cost to support UMC residents who are unable to continue to pay for their care.)

Medicaid Shortfall Support: \$8,054,000

(The difference between the cost to care for Medicaid residents and the amount provided by Medicaid.)

Payments to towns, in lieu of taxes: \$490,000

(Even though UMC is a tax-exempt organization, recognizing the support received by each municipality, a PILOT amount is paid to offset such costs.)

Value of staff time, talent and use of campuses: \$407,190

(Community benefit activities provided by staff at UMC campuses.)

TOTAL Community Benefit Value for 2024: \$11,613,190



Daisy Troup at Pitman



Stockton University Successful Aging



- **Health and wellness:** health screenings, vaccination clinics, insurance information, dementia information, fall prevention information, healthy eating, and other programs that address community health
- **Education:** caregiver support, wellness programs, health professional education, health insurance information, and medication reconciliation
- **Community resources:** access to social activities, voting and election access, Medicare & Medicaid expertise, art & music interaction, and senior ID's
- **Outreach:** food & clothing drives, farmer's markets for availability of fresh produce, counseling assistance, and corporate affiliations
- **Technology assistance and availability:** computer access, training, and scam awareness



OUR FUNDS

How Your Dollars Make a Difference

The UMC Foundation makes a difference in the lives of residents, their families, teammates and our overall community through the following programs:

- **Area of Greatest Need** represents unrestricted giving, which gives the UMC Foundation flexibility to simultaneously address UMC's urgent needs and seize new opportunities. Contributions to the Area of Greatest Need ensure we can make the greatest impact where it's most needed.
- **Gift of Care Circle** provides support when our UMC residents, through no fault of their own, have exhausted their financial resources.
- **Tapestries Memory Care Fund** supports UMC's specialized programming to enhance quality of life for residents and clients living with Alzheimer's disease or other forms of dementia.
- **Senior Wellness Fund** assists with programming costs related to lifelong learning, physical fitness, socialization, and holistic wellness programs.
- **Funds supporting UMC Teammates**, like the **Teammate Compassion Fund** to assist teammates struggling with unforeseen financial emergencies, and the **Teammate Enrichment Fund** to provide scholarships, training, and professional development opportunities.

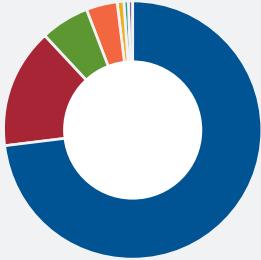
The Foundation raises funds for UMC's work through a mix of annual giving, legacy giving, special events and community engagement.

Donations may also be restricted for use at a particular United Methodist Communities location. If you are interested in restricting your gift in this way, we encourage you to contact a member of the Foundation team to discuss how your areas of interest can be matched to your UMC community's current needs.

To learn more how YOU too can make a difference,
visit: umcommunites.org/foundation

UMC FOUNDATION FISCAL YEAR 2024 REVENUE

Realized Bequest & Trust Income	\$1,072,301	73%
Area of Greatest Need (<i>unrestricted</i>)	\$225,150	15%
Community Restrictions	\$91,840	6%
Gift of Care Circle	\$61,443	4%
Teammate Compassion Fund	\$4,865	>1%
Tapestries Memory Care Fund	\$4,525	>1%
Senior Wellness Fund	\$710	>1%



Total Revenue and Other Support
\$1,460,835.79

REVENUES AND OTHER SUPPORT

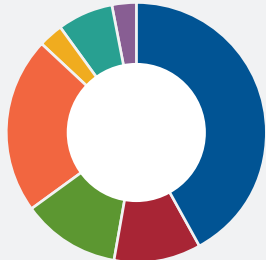
Health Care	\$36,325,714	39%
Assisted Living	\$38,174,988	41%
Memory Care	\$10,068,461	11%
Independent Living	\$3,442,545	4%
Home Care	\$2,319,010	3%
Other	\$1,792,961	2%



Total Revenue and Other Support
\$92,123,679

OPERATING EXPENSES

Direct Care Costs	\$42,502,532	42%
Dining Services	\$11,421,883	11%
Building Services	\$12,405,901	12%
Administrative Service	\$22,574,278	22%
Interest Expense	\$2,594,511	3%
Depreciation & Amortization	\$6,978,899	7%
Write Off of Project Cost	\$3,400,845	3%



Total Operating Expenses
\$101,878,849

Innovation Through Intentional Investment





Pam Garofolo, corporate director of Tapestries, defines innovation as “thinking outside the box” - and that perfectly describes UMC University!

Pam remembered the birth of the idea to educate and empower up and coming UMC staff. “When you’re on the right track, it becomes easy,” she said. “Everything falls into place.”

A small group from the recruitment and retention team met one morning to make a list of what they felt was crucial to understand as a leader, everything from risk management to critical thinking to human resources. By that afternoon, the team realized they could teach those skills as a class held in four consecutive sessions over the course of a year.

“We’re in our second year!” Pam shared. “We’ve had a number of graduates and great feedback from participants. UMC University is well-attended and well-received.”

One of the key motivations behind UMC University was to create opportunities to hire for management positions from within. “It’s not just top management who come to the sessions,” explained Michele Matthews, executive director of Pitman Manor. “It shows we want to invest in others and give them opportunities to potentially have management positions as well. We cultivate and grow our own and don’t just depend on outside folks to fill positions.”

Innovation via UMC University is how UMC invests in its staff and increases engagement!



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