

2021

WesleyLife Annual Report



THRIVING

Forward

Our Mission

Guided by **Christian compassion**, we support the independence, health and well-being of older adults **wherever they call home.**

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A Message FROM OUR CEO

Although each of us views even the most common of experiences in a different light, I think it's safe to say that as 2021 became a memory, we were all happy to have left the worst of COVID-19 in the rear-view mirror. Scientists tell us not to expect the disease to have disappeared, but it seems we can expect it to be far more manageable going forward.

And although I've never been happier to bid farewell to anything, as I take stock, I do admit to feeling grateful for the unintended gift the pandemic left in its wake: the reality that as an organization, **we not only survived, but thrived** in an environment that's been like nothing we've ever seen.

Our continued strength can be attributed to a number of sources, but first, I credit our board members, who are in large part to thank for tireless support and guidance. Equally important was the "one for all, and all for one" attitude demonstrated by residents and family members; it bolstered our leadership team and enabled us to keep pushing forward.

And last but certainly not least, I will always be grateful for the heroics — no, that's not too strong a word — of our team members. We will never stop working to ensure you know how much your work matters and that you are proud to work here.

It was not lost on me in 2021 that doing the right thing is not always easy. The repercussions of our decision to require our team members to be

vaccinated against COVID were sometimes negative, but at the end of the day, we knew the decision was the right one to support our mission and protect the health of everyone associated with WesleyLife. I am thankful for our 100% vaccine-compliance rate, and for the gift of change to honest, open one-on-one dialogue with those who perhaps saw the situation differently from the way I saw it.

Challenges and Opportunities

Just as it handed us some challenges, 2021 presented WesleyLife with undeniable opportunity. Skilled and committed new team members, residents, and clients joined our work. We celebrated the opening of our 12th community, The Summit of Bettendorf, and broke ground for our Fieldstone of DeWitt community. We also broke ground for an expansion of The Cottages in Pella and a game-changing \$25 million redevelopment of Wesley Acres, where the WesleyLife story began.

And in 2022, we're breaking ground for our new Meals on Wheels campus, which will enable us to provide hot, healthy meals to exponentially more

older adults and military veterans of all ages. Other developments will be announced in due course.

As we head toward our 75th anniversary in July 2022, we are honored to touch the lives of more individuals than ever before with health and well-being services designed to help them live their best lives. As we celebrate, **please know how much I appreciate every person who happens to be reading this.** I may not see you daily or even weekly or monthly — but that doesn't mean I'm unaware of your presence and your contributions to our organization.

The WesleyLife family is what it is because of you. Please know you have my sincere gratitude.

Sincerely,

Rob Kretzinger
President and CEO, WesleyLife

Broadening our reach **BY DOING GOOD**

More than 240,000 hot, healthy meals delivered to **1,000+** food-insecure Central Iowans

100+ military veterans served through Meals on Wheels and We Honor Veterans hospice program

6 WesleyLife at Home services enhanced the lives of people outside our campuses

“Do all the good you can ... to all the people you can ... as long as ever you can.” – John Wesley

1,800 team members served nearly **10,000** residents, clients, and participants throughout the organization

5 major development projects under way to extend our reach

152 adults of all ages assisted through our **Public Health** programs

7 participant lives saved by Meals on Wheels drivers



Moving Forward **WITH A GROWTH MINDSET**

By Chad Rasmussen, President, WesleyLife Board of Directors

There is no doubt you’ve heard the term “the only constant is change,” and never has that been truer than during these past two years. COVID has forced upon all of us, including WesleyLife, not only change, but also new realities we did not foresee. And as I reflect on how our organization not only adapted but *thrived* in the midst of change, I am tremendously honored to be part of this team.

As I write this, WesleyLife is in a phase of unprecedented growth and development, with 2021 having been filled with groundbreaking ceremonies,

master planning, and countless conversations about how to further broaden our reach to bring a message of health and well-being to additional markets.

I am simply so proud of this organization: of its leadership, of its heritage, and of its promise to continually redefine what it can mean to grow older. I am proud of our team, especially the front-line team members who demonstrated once again in 2021 that they have a true calling to enhance the lives of those they serve.

As we head toward a celebration of WesleyLife’s 75th year of service, I hope you’ll join me in gratitude for all the years that have brought us to this point and for all the good things to come. I feel so privileged to be a part of WesleyLife.

Sincerely,

Chad Rasmussen
President, WesleyLife Board of Directors

A few of the highlights included:

- Opening the beautiful Summit of Bettendorf to bring a new kind of senior living to the Quad Cities;
- Preparing to offer person-directed living in Clinton County with the planning and construction of Fieldstone of DeWitt;
- Making it possible, with our Hearthstone addition, for greater numbers of Pella residents to once again seek services close to home;
- Planning to broaden the reach of WesleyLife Meals on Wheels and create intergenerational opportunities for area residents with a new campus near Drake University that will feature an expanded commercial kitchen, cafe, garden, and more;
- ...and lastly, at Wesley Acres, the place where WesleyLife began, helping to illustrate with a \$25 million redevelopment project what it means for a campus to be truly connected to the neighborhood and the greater community that surrounds it, with the promise of enriching intergenerational connections and much more.

Committed Team Members:

OUR HEROES

Among our 1,800 team members are 1,800 stories, many of them made even more poignant in 2021 by the continuation of the COVID pandemic and the realities of serving in environments that involve healthcare. As 2020 rolled into 2021 and the pandemic continued to change the way we lived and worked, our front-line team members rolled up their sleeves to receive their vaccines, donned their Personal Protective Equipment, and kept the wheels in motion throughout our organization. They not only served as team members, but as pseudo family members, connecting residents with their loved ones, keeping spirits up, and sacrificing their own time to make sure shifts were not just covered, but covered well.

Quality Servant-Leadership

In WesleyLife's communities and services, quality servant-leadership is a given; we hire those who subscribe to it and vow to model it. The compassion, dedication, and devotion our front-line team members show to those they serve, though — that's not a given. It's a bonus, and a testament to the caliber of those who have chosen WesleyLife as their career home.

To all our team members: Thank you for sitting at our table and using your skills, your heart, and your voice to make us better.

“ I respect and care for our residents as though they are my own family members. I am grateful to WesleyLife for giving me an opportunity to make a difference in the lives of others who need my skills and my compassion. ”

- Isha Saidu,
Certified Nursing Assistant,
Wesley Acres



Succeeding as a Team

BY INVESTING IN ONE ANOTHER

You've heard all the clichés and tropes – *the only certainties are death and taxes. If you want to make God laugh, tell Him your plans.* The list goes on.

We saw illustrations of those old adages throughout 2021, for certain. Few people could have expected the pandemic to last as long as it did, and COVID's twists and turns continued to surprise us. With so many uncertainties to work through, one of the ways we thrived as an organization was to remain consistent — especially in our ongoing commitment to **investment in our team members.**

There's no more important component of our organizational culture than that investment. As WesleyLife has grown and evolved, we've worked hard to evaluate and enhance our culture in light of the feedback we receive from current and prospective team members about what truly fulfills them at work. We've learned that the “forced fun” that seemed so popular just a few years ago has been recognized as inorganic and not always effective; sure, there's nothing wrong with happy hours, but they usually don't attract new team members or keep an existing team intact.

Alignment with Pillars

So as 2021 continued to challenge the employment landscape, we doubled down on emphasizing the alignment of our culture with our four organizational pillars: **Heritage, Well-Being, Excellence, and Innovation.** Mindful of the fact that “real” organizational culture forms when no one is looking, we interacted, human to human, with empathy and concern. We employed such resources as team member-assistance and “bridge” funds to assist those who had been impacted by COVID and other hardships. We checked in with one another more frequently, mindful of the emotional and mental health challenges presented by the continuation of an unprecedented global health situation.

We continued to invest in developing our team members' careers, making paths for education and advancement available on a broader scale than ever

before. The pandemic presented opportunities that some team members had never considered; aides became CNAs, CNAs became nurses, and nurses returned to the classroom to earn additional advanced degrees. In addition, to meet needs presented by the COVID challenge, many team members from different areas — housekeeping, culinary, and maintenance, just to name a few — studied for and receives certifications as aides and CNAs to help their communities.

By focusing on continually developing our team members, WesleyLife fulfills an organizational goal of enhancing the well-being of ALL who place their trust in us while helping to ensure that our clients and residents receive the highest-quality services.

In 2021, we were honored to be named a **Great Place to Work®** for the fourth year in a row, and to also be designated a *Fortune* Top 20 Best Workplace for Aging Services. Receiving accolades when everything is going easily and well is wonderful, and receiving them during times of unprecedented challenge is humbling. We are grateful every day to employ the best of the best, and to receive feedback that motivates us to work to further enhance the work experiences for all who make WesleyLife what it is.



Kristy VanDerWiel
Chief Culture Officer

HELPING

Our Own:

The WesleyLife Promise Keeps on Giving

When Gene* and his wife, Audrey*, moved into one of WesleyLife's Des Moines Metro communities, they were excited to make the second half of life the best half. In their early 70s and blessed with good health and financial security, they had every reason to believe they would enjoy their new home for many years.

Then, one summer morning, Audrey suddenly wasn't herself; her words were jumbled, and as Gene reached for the phone to call the doctor, she collapsed. Emergency responders arrived; surgery and a long hospital stay followed. Audrey had suffered a cerebral aneurysm, and although she had lived, she was not able to return to the independent living apartment she shared with Gene.

Gene was grateful that Audrey's room in the community's health center was only a short walk from that apartment; he visited her daily, and, comforted by his faith and his children, gradually became used to a life he could not have envisioned.

Running Out of Money

Then, another crisis: His oldest son, an accountant who managed Gene's finances, told him that the cost of Audrey's care had taken a toll, and he might not be able to afford to live in the community much longer.

*Names and identifying features have been changed.

"I remembered something about the WesleyLife Promise, which had been explained to us before we moved in: that even if we depleted our resources, we would not be asked to leave," Gene says, wiping tears from his eyes. "I went to see our Executive Director and was asked to complete some paperwork, and I found out a few days later that I would be allowed to stay, and the part of the monthly service fee I wasn't able to pay would be supplemented."

The Good Samaritan Fund

That supplementation came from the community's Good Samaritan Fund, populated by years of donations from residents and others who are committed to helping those who, through no fault of their own, find themselves in financial straits. Although 2021 was difficult for many, donations to each WesleyLife community's Good Samaritan or Good Shepherd fund were as populous as ever, and as many as 15 people across the organization benefitted from that generosity.

"To be honest, that was one of the reasons we chose WesleyLife, although we never thought we'd have money problems," Gene says. "To think that people are that generous for the benefit of people they don't know – well, my mother always said there are angels among us, and this proves her right."

Turn to page 30 for more on the WesleyLife Promise in action.

Propelling Forward Through DONOR GENEROSITY

With the help of thousands of generous donors like you, WesleyLife's philanthropic efforts thrived in 2021. Through a capital campaign executed in coordination with the DeWitt Community Hospital Foundation, you made it possible for us to move forward with plans and break ground for **Fieldstone of DeWitt**, a community that will offer assisted living, memory support, short-term rehabilitation, and long-term care to residents of Clinton County in eastern Iowa.

You also made it possible, via an outpouring of community support, for us to add to **Hearthstone's Cottages campus**. The addition replaces Jefferson Place, another Hearthstone campus, which was lost in 2020 to a water-main break; the two new households contained in the addition will enable Hearthstone to regain capacity for services and care that was lost from Marion County when Jefferson Place was forced to close. Welcoming Pella residents back home for services is a joy – and we have you to thank.

Our \$25 million **Wesley Acres** redevelopment includes a restoration of the historic Chamberlain Mansion, where WesleyLife began; you'll have the opportunity to join us in that effort, as well as an initiative to replace our **Meals on Wheels campus** to triple our capacity to serve hot, healthy meals to older adults and military veterans of all ages. With your support, WesleyLife will continue to broaden our reach, making it possible for individuals who benefit from our services to enhance their health and well-being as never before.

We welcome you to join our effort in 2022 by supporting our programs through your gifts of time, talent, and treasure. Thank you to all of those who continue to help WesleyLife thrive!

- Chad Vogel, Vice President of Philanthropy

WesleyLife's Philanthropy team, from left: Chad Vogel, Vice President of Philanthropy; Denni Gale, Philanthropy/Financial Assistant; Amanda Leinen, Director of Donor Data and Compliance; Hans Hoeksema, Director of Philanthropy Projects



Fieldstone of DeWitt, opening 2022



Wesley Acres redevelopment, slated for completion 2023



Cottages addition, Hearthstone, opening 2022



ENHANCING

Health and Well-Being:

Where We Serve

WesleyLife Communities

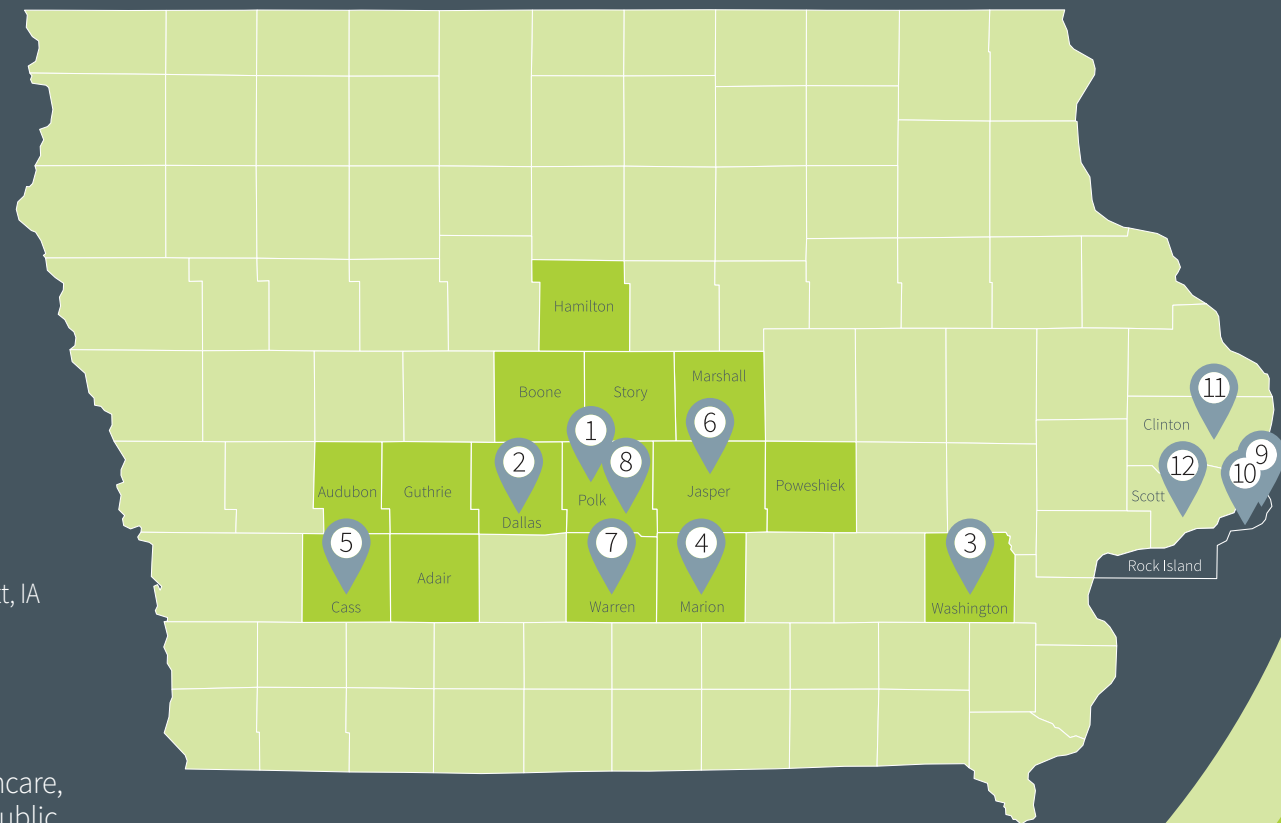
- 1 Brio of Johnston – Johnston, IA
- 2 Edgewater – West Des Moines, IA
- 3 Halcyon House – Washington, IA
- 4 Hearthstone – Pella, IA
- 5 Heritage House – Atlantic, IA
- 6 Park Centre – Newton, IA
- 7 The Village – Indianola, IA
- 8 Wesley Acres – Des Moines, IA

WellSpire Communities

- 9 Crosstown Square Apartments – Silvis, IL
- 10 Illini Restorative Care – Silvis, IL
- 11 Westwing Place/Fieldstone of Dewitt – DeWitt, IA
- 12 The Summit of Bettendorf – Bettendorf, IA

WesleyLife At Home

A combination of services including Home Healthcare, In-Home Services, Nutrition, Hospice Care, and Public Health Services is available in the counties shaded a darker green. Adult Day services are available in Polk and Jasper counties.



Servant-Leaders

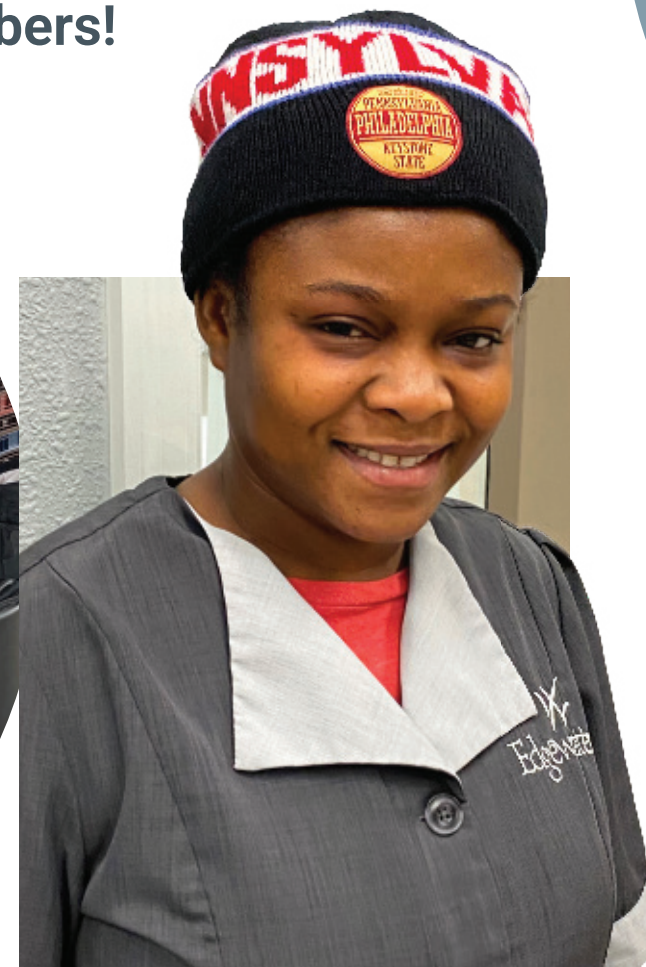
THRIVING THROUGH CONNECTION

The next several pages, with highlights from our communities and services, illustrate how thriving through relationship creates “masterpieces” of connection across our organization.

We are grateful to our caring, committed team members!

“
When love and skill
work together, expect
a masterpiece.
”

- John Ruskin



Communities and Services:

STRENGTHENING THROUGH CONNECTION

Heritage House Helps Greater Community “Normalize” through COVID

Heritage House played a central role in the Atlantic community’s return to normalcy following COVID. More than 100 admissions occurred — a record! — and new programs and events were held, including Family Fun Night, JOY club, glee choir, field trips, shopping, and more! We learned to better balance the need for growth with group and individual activities, and we now offer even more robust programming for residents, whether or not they choose to connect with others or enjoy time in their own apartments.

It’s an understatement to say that the demands of COVID continued to challenge team members throughout 2021, but we learned we could rely on one another when we were in need. This closer bond led to higher team-member satisfaction and retention, and we ended the year with 15 percent more team members than we started with!

- Peter Gray, Executive Director



The Village Celebrates Past, Looks to Future

What a year 2021 was! In the midst of marking our 30th anniversary with a wonderful celebration that included a visit and remarks from CEO Rob Kretzinger (pictured), The Village worked hard to find our “normal” again following the worst of COVID. Our community-improvement efforts ranged

from razing an old house that sat on our property to fixing our sidewalks to improve walkability, ensuring our residents and team members can move naturally and safely while enjoying outdoor walking paths. We also worked hard on the inside of the community, making updates to gathering spaces and enhancing our therapy environment.

We are also serving more people than ever before in our short-term rehabilitation and long-term care areas! And as we look forward to the rest of 2022, we’ll focus on further enhancing our programming, including health and well-being offerings and educational courses. We’re excited about everything the future holds for The Village!

- Heather Frank, Interim Executive Director

Communities and Services:

STRENGTHENING THROUGH CONNECTION



Westwing Place Builds on Strong Foundation to Transition to Fieldstone

Westwing Place will celebrate its 50th anniversary this year, shortly thereafter transitioning operations to Fieldstone of DeWitt. The past year has been a perfect mix of stabilization and growth, allowing team members to refocus their efforts toward intentional person-directed care for those we serve. The community as a whole has invested in feedback from all parties, creating best practices for evaluating and acting upon real-time assessment from residents and team members alike. A new 24-to-48-hour follow-up process allows new guests and residents to provide input on their stays, and praises and concerns are shared immediately with the team with interventions placed when needed. Likewise, a robust rounding program allows for team members to share their thoughts and ideas with members of the interdisciplinary leadership team with prompt follow-up, feedback, and action.

In addition, Westwing Place was awarded Best Workplace in DeWitt by the DeWitt Chamber and Development Company in 2021. With the opening of our replacement community on the horizon, this prestigious designation is sure to assist in recruiting and retaining top quality candidates to serve those that choose to call Fieldstone “home”.

- Chelsey Killean, Administrator



Illini Restorative Care – Focusing on Team Member Experiences

With the help of our new People and Culture leadership in 2021, we began to focus on culture as never before! For the first time, we hosted a Trunk or Treat, allowing neighborhood and team members’ children to safely trick-or-treat and connect with us while inviting our residents to take pleasure in watching the children from a safe distance.

With a more concerted focus on team-member experiences, we converted an office into a beautiful relaxation room, equipped with plush recliners, mini-fridge, soft lighting, music options, and aromatherapy. Our Culture Club committee has been dedicated to offering one employee appreciation event every week, the most popular being our monthly coffee bar and the two food trucks that we provided during the warmer months. During monthly team-member meetings, we received valuable feedback to let us know what we were doing well and how we could improve. We look forward to an even stronger 2022!

- Jennifer Dunk, Administrator

Communities and Services:

STRENGTHENING THROUGH CONNECTION

Park Centre's Future is Brighter than Ever!

As we reflected on 2020 and looked toward 2021, we knew that our lives were forever changed. The outpouring of support from the greater Newton community filled us with gratitude and the desire and opportunity to give back.

During 2021, Park Centre residents and team members held a canned-food drive for our local food pantry, prepared a meal for a local non-profit ministry, hosted a garage sale and raised funds to support cancer patients in our county, and held a walk and fundraiser to benefit Alzheimer's disease research. We partnered with DMACC and Friends of the Newton Parks by providing a free community breakfast and activities for families. We collected socks and donated them to local schools. During the holidays, we adopted families and helped make their Christmases a little brighter.



Residents and team members gathered in smaller groups and learned how to make self-care a priority with healthy cooking demonstrations, book clubs, and heart-health and meditation classes. As a result, we created closer connections and became a stronger community.

While we learned many lessons from the past year, the one that meant the most to us is how a community can come together and unite as one. As we look toward the remainder 2022 and celebrating our 30th anniversary, the future of this community is brighter than ever.

- Shannon Minshall, Executive Director



Halcyon House – Looking Back (and Forward!) in Appreciation

It's always fun to look back at a prior year—negative aspects fade, and we see and appreciate accomplishments and improvements. 2021, even with the continuation of COVID-19, included many positives, too:

- We renovated our Applewood Lounge as a gathering and dining venue for our residents.
- We began construction on three pickle-ball courts and 21 raised gardens on our campus.
- Even with COVID-19, Halcyon fared very well with minimal team member turnover, strong census, and customer satisfaction.
- Our regulatory surveys in 2021 were excellent, raising Halcyon House to a top 5-star rating by CMS/Medicare.
- We had more residents across our campus in 2021 who were over 100 years old than ever before—nine people, all living vibrant, meaningful lives!
- The genuine care and concern shown for our families, our team members, our residents and our friends is strikingly apparent at Halcyon House; we know and understand that this is such a blessing.

As we look toward the remainder of 2022, we have many things to look forward to, including several capital projects, and getting “back to normal” with socialization and dining services within Halcyon House and the greater Washington community. Science tells us that looking forward to even the smallest parts of our day (or year) can make life more enjoyable and improve one's outlook on life. We are thankful.

- Chris Marshall, Executive Director



The Summit of Bettendorf A new kind of senior living for the Quad Cities.

In 2021, The Summit of Bettendorf — honored to open as WesleyLife's 12th Community for Healthy Living — truly brought a new kind of community living to the Quad Cities of Iowa and Illinois. With our foundations in enhancing the health and well-being of those we serve, we introduced amenities never before seen in this market that attracted a group of residents who started as strangers and became friends. And our team connected as well, with team members leaning into one another's strengths as we worked our way through the challenges and joys inherent to opening a new campus. We're honored to be a part of the beautiful city of Bettendorf and look forward to serving happily for a very long time.

- Michelle Lindeman, Executive Director

Communities and Services:

STRENGTHENING THROUGH CONNECTION

Hearthstone Celebrated “The Joy of Community” in 2021

In 2021, Hearthstone thrived by celebrating “the joy of community” with chef-table meals, farmer’s markets, summer concerts on the lawn, bean-bag baseball, bus trips, and – best of all – welcoming friends and family back onto our campuses!

As we and the rest of the world reopened, we began looking at things through a new lens, which led to the purchase of a new bus and a grant for a fitness-center remodel. Both of these endeavors will help us live out our mission, providing opportunities for current and future residents as well as for community members who participate in Rock Steady Boxing and Well Ahead programming in our community.

In addition to thriving with our current residents and team members, we celebrated in April the groundbreaking for a new development that will serve 36 residents in two households with 18 residents each. Strong community partnerships and collaboration led to a successful capital campaign that generated \$2 million in funding to help ensure community needs for care and service will continue to be met.

The year 2021 allowed us to prioritize joy and positive mental health across our community, implement new best practices, eliminate things that were no longer important, and identify new opportunities that will benefit our residents, our community, and our team members for years to come.

- Nancy Hamilton, Executive Director



Growth Focus Powered WesleyLife at Home in 2021



In 2021, WesleyLife At Home’s service lines focused on growth to serve even more clients and patients in central Iowa than before. To support that growth, we focused our efforts on recruiting exemplary team members who are committed to providing great care and on retaining the terrific people who are already on our team. The challenges we’ve all experienced in the past two years have put us to the test, but we have risen to the occasion.

We know the work we are doing every day means older adults can stay independent in their homes and recover from surgeries and hospital stays, and that clients and families receive the support they need during a loved one’s final stages of life. We are thankful for the opportunity to continue to make a difference!

- Joy White, Executive Director

Crosstown Square Focused on Connections in 2021

One of Crosstown Square’s primary focuses in 2021 was connections between our residents. We stress that we are a family, and that each of us plays a vital part in making our community the exceptional independent-living campus it is.

Because of some extra effort toward forming those connections, residents over the past year began socializing with others they hadn’t previously socialized with, sharing their lives with one another and building a real kinship. And as each resident became more comfortable, participation in our programming grew, providing opportunities to enhance the health and well-being of everyone who calls Crosstown Square “home.”

As we look toward the remainder of 2022, we know our connections will continue to solidify. We’re grateful to WesleyLife and WellSpire for providing a holistic well-being framework that improves the lives of everyone we have the privilege of serving!

- Julie VanWinkle, Director



Communities and Services:

STRENGTHENING THROUGH CONNECTION

Edgewater – The “Untold Story” of 2021

Each day at Edgewater, our leadership Team comes together for a morning “Stand-Up” to check in with one another and, most importantly connect with one another. We end each meeting with a meditation and an inspirational message. Today’s inspirational message was this:

“The untold story of 2021: People became kinder. Global rates of helping strangers, volunteering, and giving to charity are nearly 25 percent higher than during pre-pandemic levels. The dominant response to suffering is not selfishness. It’s compassion. The worst of times bring out the best in us.”

When I read this to our team this morning, I was touched deep in my heart as I reflected on 2021 at our community. Last year was a famously tough year that was beautiful and magnificent in so many ways. In spite of some of the biggest challenges our industry has faced — staffing, COVID, increased supply-chain issues and team-member burnout, we have found resiliency through generosity and selflessness.



I believe one of WesleyLife’s greatest gifts is our Good Samaritan Fund, a promise made at each community that we will never ask a resident to leave if they run out of money. In 2021, as an example of “the untold story,” our residents responded to the Good Samaritan call with a 146 percent increase in donations over the previous year: an astonishing \$220,283 in 2021 compared with \$15,096 in 2020. The spirit of generosity, kindness and community remains alive at Edgewater.

- Glen Lewis, Executive Director



Brio – The Best is Yet to Come

As I reflect on the past year — interacting with residents, team members and family members and immersing myself in Brio’s culture and watching our mission in action — my reasons for joining WesleyLife are reaffirmed. Even during COVID, the dedication to our mission never wavered. I want to take

this opportunity to extend a huge “thank you” to all the residents, family members, and team members who trusted WesleyLife and Brio in keeping everyone safe. As we (hopefully!) come out of the pandemic, I could not be prouder of our awesome and hardworking team members and all they do to care, support, and bring joy. Our team members — truly “Brio’s Heroes” — have worked countless hours over the past year to keep residents healthy, happy, and engaged. The smiling faces I saw every day were witness to the personalized care and warm, welcoming environment that our team members created and enhanced day-in and day-out.

And I feel the enthusiasm that’s abounding in our community as we welcome brighter, warmer days and additional visitors, new programming, and

larger gatherings! There’s no doubt the pandemic challenged all of us in many ways, but a sense of optimism and positivity kept us moving forward. I’m so happy to be a part of this community, and so excited to see what the future brings!

- Teresa Krueger, Executive Director

Communities and Services:

STRENGTHENING THROUGH CONNECTION

Wesley Acres – Reimagining Our Future through Redevelopment

When you ask someone what they thought of life in 2021, you'll likely hear some emotional answers. After all, the first pandemic of our lifetimes was still raging through the year. The labor force constricted nationally as many left their jobs, and geopolitical tensions around the world caused many to feel even more stressed.

One thing that stood out to me during such a fraught year was my gratitude to work with an organization that not only survived, but also thrived during a time of unprecedented challenge. Another standout memory: They say you see a person's true character during the toughest times. I once again watched so many team members step forward. For over two years, their commitment to our residents and fellow team members has continued to inspire me.

We are in the midst of a \$25 million redevelopment project that will enhance the ways we're able to connect with the Greater Des Moines community while serving current and future residents with expanded well-being programming and so much

more. We're moving forward with optimism and a sense of great excitement, and we can't wait to unveil our "new" community in 2023!

- Damon Buskohl, Executive Director



Excelling through Vision: A LEADERSHIP MILESTONE

This year marked a special anniversary for our President and CEO, Rob Kretzinger: his 25th anniversary with WesleyLife!

Rob arrived at WesleyLife — then Wesley Retirement Services — in 1996 as chief operating officer. Seven years later, he was named president and CEO, one of the youngest at that time in the aging-services landscape.

Since then, he's led WesleyLife's evolution to a comprehensive health and well-being organization that serves nearly 10,000 residents and clients in 12 Communities for Healthy Living and a breadth of home- and community-based services. And as WesleyLife's 75th birthday approaches, the organization remains heavily in growth mode; see page 33 for details!

"I can't imagine a bigger blessing than to have been here 25 years, serving with our board of directors and 1,800 team members to create experiences for, in some cases, generations of families," Rob says. "What they say about the passage of time is true; 25 years has gone by in the blink of an eye.

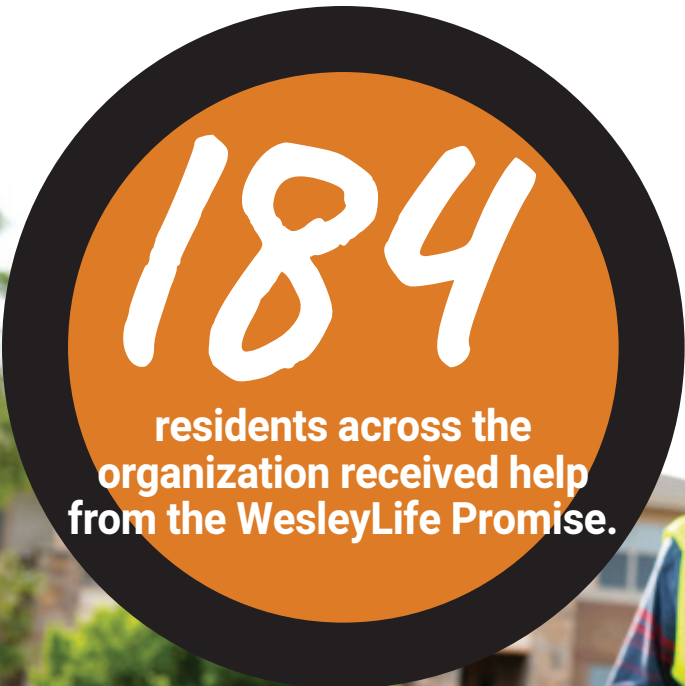
"Every year, I understand to a greater degree what our work here is truly about. Daily, I'm reminded of the power of our people — those we serve and those who do the serving. Our campuses are wonderful, and we are blessed to have them. But more than physical buildings, **our strength is in connections that form,** and how we're all made better by them. I am just so fortunate to have been a part of all this, and to be a part of the really exciting things to come."



SERVING

By the Numbers

Of the **240,000+** meals serves to older adults via WesleyLife Meals on Wheels, **21,109** were served to military veterans of all ages.



184
residents across the organization received help from the WesleyLife Promise.



\$4,253,023

was donated to WesleyLife in 2021

216 volunteers gave of their time and talents to support WesleyLife programs and services.

\$628,473

was donated to Good Samaritan/Good Shepherd funds to support the WesleyLife Promise.



7
team members received scholarships to help further their educations.

Transforming through **GENEROSITY**

The Legacy Society represents individuals who have named WesleyLife and/or one of our communities or programs in their wills or through other planned giving instruments. We are deeply moved by the decisions of these individuals to leave personal legacies with WesleyLife.

We work closely with current and future Legacy Society members to ensure the impact they expect will be realized, and we are honored to recognize and thank them.

Anonymous (4)	Howard Frazier	William and Barbara Keck
Shirley and Duane Acker	Elizabeth Frink	Alberta and Burt* Kisling
Bill and Helen Brantley	Jim and Evelyn Gore	Gary Kloppenburg
Tom Carpenter	Marylin A. Gorham	Eugene and Lois Knol
James Morrison Collier	Ethel and Donald* Hendrickson	Rob and Glenda Kretzinger
Richard and Ruth Davitt	Dale and Barbara Henning	Everett Laning
Philip Dorweiler	Dwight and Patricia Hicks	Jack and Charlotte Maples
Gladys M. Ferguson	Betty Jean Hotchkin	John and Jan Mechem

Donors of Distinction WesleyLife recognizes living donors and organizations with a lifetime giving total of \$100,000 or more as Donors of Distinction. By achieving this level of giving, these donors have demonstrated trust in and commitment to WesleyLife's mission, vision, and values.

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Andringa Family Foundation	Gabus Family Foundation	Principal Financial Group
Atlantic Coca-Cola Bottling Company	Geisler Penquite Foundation	Foundation, Inc.
Clinton County	Iowa Annual Conference of the UMC	Smith Family Foundation
Development Association	Kresge Foundation	The Coons Foundation
Community Foundation	Marion County Bank	United Way
of Greater Des Moines	Marion County	Unity Point Health
Corteva	Community Foundation	Vermeer Charitable Foundation
DeWitt Bank & Trust	Maytag Corporation Foundation	W.T. and Edna M. Dahl Trust
DeWitt Community	Meals on Wheels of America	Washington County
Hospital Foundation	Pella Community Foundation	Riverboat Foundation
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Alan and Myrna Tubbs
James R. and Dottie* Tyler
Bob and Lois Vermeer
Craig Witte and Ann Abplanalp
Mark and Marsha Witte

*Deceased

Annual Donor Clubs We gratefully acknowledge the following individuals and organizations for their 2021 contributions to WesleyLife. The donor levels include all gifts and pledges made from January 1 through December 31, 2021. Future pledge installments are recognized in the year they are originally committed.

Century Club \$100,000+

Encova
Pella Corporation
Ruan Foundation
The Fred Maytag Family Foundation
Reeg Family Charitable Foundation
Lois Debes
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Founders \$50,000 - \$99,999

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DeWitt Family Dentistry
The Coons Foundation
Wellmark Foundation
Kenton and Christine Coons
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Lincoln Way Community Foundation
M.E. "Doc" Shelton, D.C. Family
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MidWestOne Foundation
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Katherine Sopasakis
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Patti Waack
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Transforming through **GENEROSITY**

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 Marty and Katie Walsh
 Kay Ward
 Craig and Kathy Wassenaar
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 John and Denise Wieland
 Dave and Mary Wisniewski

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Providers \$500 - \$999

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 First Whitney Bank & Trust
 Heritage House Resident Association
 Infomax Office Systems
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 Kum & Go
 Wellmark Foundation-BluesCare
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 Michael Carlstrom
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 Atlantic J.O.Y.

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 Foundation
 Miller Electrical Services
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 Straub Marketing
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Transforming through **GENEROSITY**

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Sue Tipton
Betty Vander Werff
Lola Vanderhart
Dortha Webster
Erwin Wittenberg
Michael Wood

*Deceased

2021 Financials **AT-A-GLANCE**

Audited Balance Sheet

ASSETS:

Cash and investments	\$ 84,538,586
Receivables	\$ 10,160,338
Other assets	\$ 1,361,016
Assets with limited use	\$ 25,833,496
Property and equipment	\$ 258,240,759

Total Assets \$ 380,134,195

NET ASSETS:

Net assets without donor restrictions	\$ 21,277,462
Net assets with donor restrictions	\$ 31,266,315

Total Net Assets \$ 52,543,777

STEWARDSHIP RESPONSIBILITY NOTE

Our goal as a not-for-profit organization is to have the resources available to fund the following mission needs: charitable services, periodic operational shortfalls, investment in property and equipment, program enhancements, and future growth. Your contributions are essential to help provide these resources.

Audited Statement of Operations

REVENUE:

Net direct services revenue	\$ 126,360,469
Use of contributions	\$ 2,376,056
Non-operating revenue	\$ 5,578,385

Total Revenues \$ 134,314,910

EXPENSES:

Salaries, benefits, and contracted expenses	\$ 79,126,902
Depreciation and amortization	\$ 13,682,216
Interest and amortization of bond issue costs	\$ 5,168,109
Other expenses	\$ 35,944,306

Total Expenses \$ 133,921,533

Surplus of Revenue over Expenses \$ 393,377

GOOD SAMARITAN/SHEPHERD CARE:

Total Good Samaritan/Shepherd Care \$ 4,390,852

The **WESLEYLIFE PROMISE**

The Good Samaritan or Good Shepherd funds at several WesleyLife communities help uphold the WesleyLife Promise, which ensures that residents who deplete their financial resources through no fault of their own will not be asked to leave their homes with us. A donation made to a community's Good Samaritan/Good Shepherd fund will remain with that community, and will be used only on that campus.

\$11,922,801

Good Samaritan/Good Shepherd total endowment funds, including amounts raised in 2021

Good Samaritan Endowments

Wesley Acres \$3.975 M
 Park Centre \$4.318 M
 Heritage House \$480,113
 Halcyon House \$824,534
 Edgewater \$338,562
 Hearthstone \$13,038
 Brio of Johnston \$27,720
 WesleyLife (Network Support Center) \$568,434

Good Shepherd Endowment

The Village \$1.123 M

Scholarship Endowments

Dahl Adult Day, a WesleyLife Adult Day Center \$5,196
 Willowbrook, a WesleyLife Adult Day Center \$27,120

Ernest and Florence Sargent Endowment Fund

Established in 1982 as a permanent restricted fund producing an annual income to benefit the Good Samaritan Annual Fund at Wesley Acres in Des Moines. \$223,082

HONORING THROUGH *Endowment*

Establishing a lasting legacy through an endowment is one of the most enduring gifts a person can offer.

Each WesleyLife endowment fund is held to perpetuity, and earnings are used to help fulfill its designated charitable purpose. Each fund is carefully managed according to the WesleyLife Board of Directors' policy on endowments, which mandates that 90 percent of earnings shall be made available for spending and 10 percent shall be returned to the principal. Named endowments can be established through a minimum gift of \$50,000. WesleyLife's named endowments are included here.

Endowment funds, including amounts raised in 2021, are included below.

Jim Collier WesleyLife at Home Endowment Funds WesleyLife at Home services for financially vulnerable older adults. **\$276,655**

\$100,693 **Gladys Baker Memorial Endowment Fund** Provides funds to assist team members at Wesley Acres in Des Moines who are experiencing emergency financial burdens

Lou Norris Endowment Fund Supports well-being programming used exclusively for Wesley Acres in Des Moines for the benefit of residents and participants of the fitness center and related programs. **\$93,291**

\$80,563 **VanDyke Memorial Nursing Scholarship** Established in memory of Helen Messenger and Gerald Van Dyke to provide nursing scholarships to team members at Park Centre.

Geisler Penquite Support Fund Established for specialized equipment, team member training, and/or community improvements that will enhance the quality of life for residents at Park Centre, and for participant scholarships at Willowbrook Adult Day Center. **\$166,312**

Leading **THE WAY**

WesleyLife is governed by an all-volunteer board of directors.

Since 1947, the board has led the growth of WesleyLife from a single retirement community to a comprehensive network of health and well-being services and initiatives for older adults, wherever they call home. Drawing upon both life experience and areas of professional expertise, board members provide oversight for the entire organization and define the ways WesleyLife lives its mission.



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Chairman

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Kevin LaGree,
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Bob Ruch

Retired President, Ruch Enterprises

Christina Taylor, M.D.

Chief Medical Officer, McFarland Clinic

Barbara Decker J.D.

Executive Director, Catholic Charities, Diocese of Des Moines

GROWING *to Serve*

As we prepare to celebrate our 75th anniversary in 2022, WesleyLife is experiencing a period of unprecedented growth and development!



Projects under way include:

A \$25 million redevelopment at **Wesley Acres** — the campus where WesleyLife formed its foundations on July 7, 1947. The project, to be completed in 2023, will enhance quality of life for current and future residents with refurbishment of the historic Chamberlain Mansion, as well as improvements designed to enhance health and well-being for all and foster a greater sense of connection with the surrounding neighborhood and the Greater Des Moines community.

A new community in eastern Iowa, **Fieldstone of DeWitt**, which will open in summer 2022 to replace WellSpire's Westwing Place campus. With nearly \$5 million raised via assistance from the DeWitt Community Hospital Foundation, community leaders, and other generous donors, Fieldstone will serve Clinton County with assisted living, memory care, short-term rehabilitation, and long-term care, all designed around a focus of health, well-being, and person-directed living.

A new **Meals on Wheels campus** near Drake University in Des Moines that will provide increased capacity for meal production (from 1,000 to 3,000 hot, healthy meals a day!) and offer intergenerational programming and experiences to help combat social isolation among older adults in Central Iowa. Scheduled for completion in 2023, the project is being funded with the help of an \$8.25 million capital campaign.



Rendering of expanded Meals on Wheels commercial kitchen

An addition of two households to **The Cottages**, a campus of Hearthstone in Pella, which will open in mid-2022 to retain care capacity that was lost in Marion County when the community's Jefferson Place campus closed last year. Programming will be designed to provide an enhanced sense of meaning and purpose with team members who are familiar with residents' histories and preferences. The project's costs were augmented by \$2 million in donations from generous area donors.

Redevelopment of **The Village**, our community in Indianola. Master planning is under way to transform the campus's footprint to enhance connectivity and foster additional opportunities for residents and team members to improve their health and well-being. Stay tuned for more on this exciting project!



THE SECOND HALF OF LIFE

can be the Best Half

At WesleyLife, we believe everyone should have the opportunity to live a life of **continued growth, experience, engagement and meaning**, regardless of physical, social, or economic circumstances. Our comprehensive network of services is designed to **fulfill the wishes of older adults** to remain **independent and active** wherever they choose to live.



WesleyLife
A SPIRIT FOR LIVING

2021
Annual Report