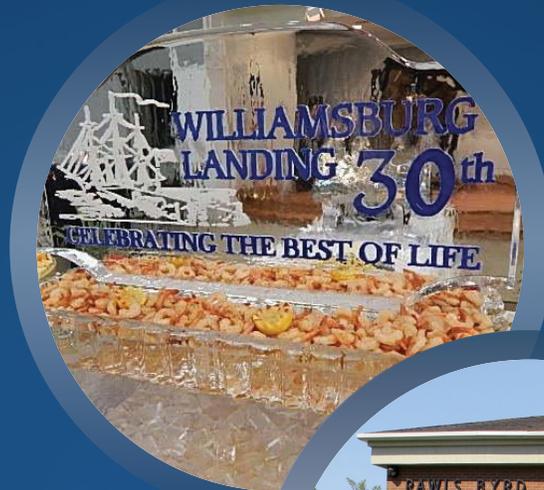


30 years of giving creates  
**RIPPLES OF CARE**



2015  
ANNUAL  
REPORT





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Williamsburg Landing is a 501(c)3 not-for-profit serving 500 residents with a wide variety of housing options and activities, governed by a distinguished board of up to eighteen members. Each member serves a three-year term, with the option of serving a second term.

The President and Immediate Past-President of the Residents' Association also serve as full voting members, by virtue of their offices.

## THE LEADERSHIP RIPPLE

As 2015 marked our 30th anniversary and the approaching retirement of President and CEO Steve Montgomery, we reflected on the strong leadership tradition integral to Williamsburg Landing's history—and essential to its future.

### **J. Randolph “Ran” Ruffin**

Ran Ruffin, a P.R. executive for Colonial Williamsburg, cast the original stone into the water with his vision for a local retirement community in 1965. Wishing to remain in Williamsburg upon his retirement, he assembled a committee to initiate efforts to develop one. Sadly, he passed away in 1978 without seeing the soon-to-be fulfillment of his dream.

### **John Boatwright**

One enduring ripple that resulted from Ruffin's actions was the recruitment of John Boatwright, a retired chief economist from Standard Oil Company of Indiana. A tenacious leader, he navigated Ruffin's vision through many storms to help make Williamsburg Landing a reality. After Boatwright facilitated the transition to a corporation in 1976, he served as its president, as well as our first board chairman in 1982, and director emeritus in 1985, when the humble community finally opened. Along with his wife Jean, he was among the first to move in, remaining an active leader until his death in 2000.

### **Bill Doig (1988-2007)**

Williamsburg Landing's longest-serving CEO, William Doig, expanded on the ripples set in motion by its founders to transform a quaint pond into a vibrant, sparkling ocean. Overseeing development of the Woodhaven Health Care Center, new homes, and an impressive health club, Doig fulfilled the important job of stabilizing and growing Williamsburg's first retirement community. A Coast Guard veteran, Bill and his wife Ruby won the respect of residents and staff, and proudly remain residents today.

### **Steve Montgomery (2007-2016)**

Steve Montgomery has perpetuated the ripple effect with innovation, opportunity, and improvement, leaving a lasting mark on our community's landscape. His tenure has brought progress in superb health care, outstanding resident services, structural renovations, amplified focus on community, and expanded investment in employee support. Steve, we thank you for the bright future that will surely flow from your leadership.



*Photos (top-bottom): J. Randolph “Ran” Ruffin; John Boatwright (left) and Hank Kremer at Boatwright Circle dedication; Mr. Doig presents architectural rendering of Woodhaven.*





## CEO'S LETTER

Dear Friends,

It has been a true honor to serve as your President and CEO for the past nine years. When I arrived, Williamsburg Landing was a successful community with wonderful residents, a beautiful campus, and a positive reputation. I was proud to come on board then, and today I am proud of how far we have come since that time. What a privilege for me to partner with you in the advancement of this special place and in the care of the special people who live and work here.

We reached new shores together, with campus improvement projects such as the Landing Building renovation and landscaping building; the birth of new programs like community relations, development, and partnership with ChooseHome; and the creation of new opportunities for our employees, including training initiatives and Helping Hands Fund growth. Most of all, I can assuredly say that we have achieved unrivaled care for our residents, with the expansion of our full-time campus medical staff, the addition of home health care and so much more.

I can't claim credit for these successes—I simply had a light hand on the rudder. Your gifts, wise counsel and support provided the wind. For that I thank you. I hope you are as proud of Williamsburg Landing as I will always be.

Of course, this is not goodbye. With my mother's continued residence here as well as lasting relationships with friends and colleagues, I hope to remain a part of this exceptional community. It has, after all, become a part of me.

But the time has come for new, energetic leadership and a fresh perspective, which I am absolutely certain Greg Storer will provide. Please welcome him as warmly and openly as you welcomed me. Something tells me he will find his new assignment rewarding and meaningful, and you will find Williamsburg Landing's future bright and secure.

With sincere appreciation,

Steve Montgomery





## NEW CEO'S LETTER

Dear New Friends,

What an incredible opportunity it is to serve at the helm of a highly distinguished retirement community that celebrated 30 years of success and accomplishment in 2015—a warm and inviting place called Williamsburg Landing. I've heard a great deal about the outstanding residents, employees and board members here, and I wholeheartedly look forward to getting to know you all.

I also consider myself quite fortunate, as I'm sure you do too, to inherit such a solid foundation of leadership by Steve Montgomery—a diligent, devoted and deservedly respected president and CEO. The fruits of his labor are evident and plentiful. My intentions are to carry Steve's vision forward, honor the history of Williamsburg Landing, and offer the best of my skills and experience to serve you as we embark on the future together.

It's an exciting time here, with a major expansion underway and new opportunities on the horizon that will meet growing needs with continued excellence in order to stay far ahead of the curve. Thank you for allowing me to join you in that process as we build on the longstanding strength and unlimited promise of Williamsburg Landing.

Sincerely yours,

Gregory T. Storer



## RESIDENTS' COUNCIL PRESIDENT'S REPORT

### RESIDENTS' COUNCIL

Roderick Bland  
Jean Bodine  
Anton Campanella  
Carol Cashen  
Virginia Dittman  
Jack Edwards, *President*  
Pat Marmion  
James Parkey  
Helen Phillips  
John Seel  
Marie Sexton  
Bob Van Duyne

The Residents' Association of Williamsburg Landing is comprised of every resident who is fortunate enough to find a home here. Twelve residents are elected to the Residents' Council, which manages the affairs and policy of the Association. In addition, nine resident committees and five resident organizations operate resident programs which provide opportunities to contribute to the community, and influence the policy of the Landing itself. All these things involve working with others.

Throughout Williamsburg Landing's 30-year history, residents have heavily influenced its shape and success. The role of residents in creating and changing their home is one of the things that makes us happiest about where we live. It benefits us today, and we hope it will benefit those who follow us.

Here are some highlights from 2015.

- The Council asked residents about their various hobbies and interests, and connected residents with similar interests.
- Bonnie and Bill Cooper were appointed to head the Flea Market, which was ably headed by Rod Bland for several years prior to his retirement from that job.
- The Council established an endowment fund, and approved a contribution to the Employee Training and Education Fund.
- The Council adopted dress guidelines to replace the more formal dress code, emphasizing the casual nature of most meals and the more upscale dress at dinner in the Dining Room.
- Residents contributed well over \$251,000 for the annual Employee Appreciation Fund.

I'd like to offer my thanks and respect, on behalf of all Landing residents, to our departing CEO Steve Montgomery. His unswerving commitment to Williamsburg Landing, combined with a desire to include residents in decisions at every level, has made Williamsburg Landing a better place. We welcome Greg Storer and look forward to a successful future partnership.

Jack Edwards, *President*

## BUILDINGS

**1984:**

Construction begins on The Moorings homes, River Court Apartments and the Landing Building.

**1996:**

Ground is broken for Woodhaven.

**2003:**

Construction kicks off for Edgewood and Earl's Court.

**2013:**

\$24 million renovation of the Landing Building is completed.



## SERVICES

**1986:**

Residents create partnership with Rawls Byrd Elementary School to mentor students.

**2007:**

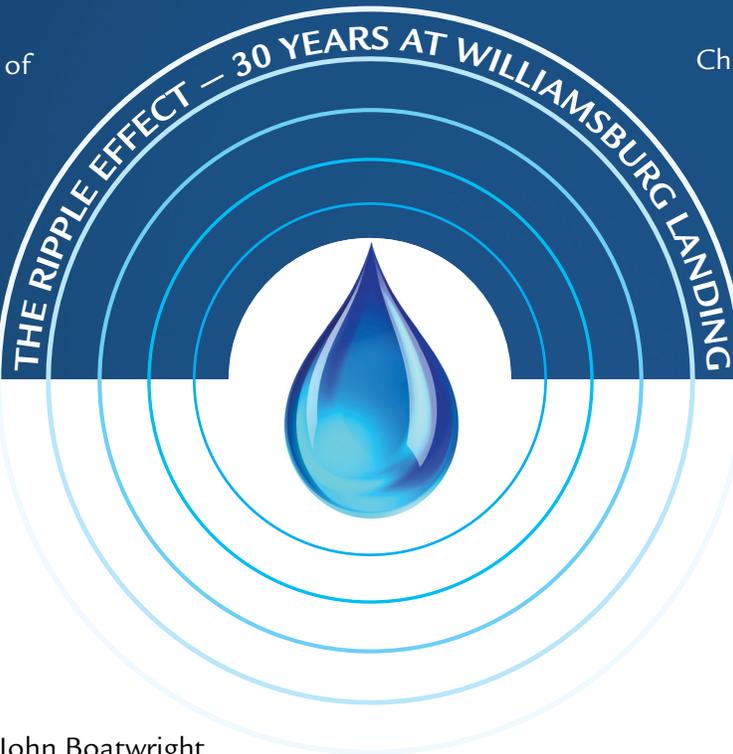
Health Club & Spa opens to residents.

**2010:**

Creating Moments of Joy classes offered to residents and employees.

**2015:**

ChooseHome is developed.



## RESIDENTS

**1985:**

First residents Jean and John Boatwright and Sally and Newton Lieurance move in.

**1987:**

Number of residents reaches 225.

**1998:**

Woodhaven opens with thirty residents.

**2002:**

Residents begin stuffing envelopes for the United Way.

**2008:**

Number of residents hits 500.



## EMPLOYEES

**1985:**

First employees hired, including Connie and Rosalind Cook.

**2008:**

Hank and Joyce Kremer establish the Kremer Nurse Education Fund.

**2010:**

Gifts from residents now welcomed by Helping Hands Fund.

**2015:**

Employee Training and Education Fund started.



## A WILLIAMSBURG LANDING HERITAGE

*Early resident Janet Wilson*

Like the first raindrop on a calm lake, one of the earliest Williamsburg Landing residents started a ripple effect in 1986 that would span generations. A recent widow, Janet Wilson was concerned by the prospect of aging alone in a high-rise retirement apartment among the beltways of Washington. Drawn to the idea of having a small house at Williamsburg Landing, she and her daughter Peggy Morton visited the new community.

At age 76, in what her daughter now calls a bold, courageous choice, Janet decided to move to the CCRC after 55 years in Washington—despite initial disapproval from her friends.

“This is the worst decision your mother has ever made!” friends told Peggy. That couple ended up moving to the Landing, later noting in a Christmas card that it was their best decision. Their daughter thanked Janet for being the influence behind that shift.

A volunteer throughout her life, Janet offered leadership to educational and community organizations, even serving as national director of volunteers for the American Red Cross. Highly respected, she went from not knowing anyone at the Landing to being the reason that many decided to move here, referring a total of 18 friends, neighbors, college classmates—and even family.

Janet’s daughter Peggy and her husband Duryea, both only children, moved to Williamsburg in 1990 to be near her, their only remaining parent, then 80 years old. The Mortons joined her at the Landing in 2004, and until Janet’s passing at age 103, both mother and daughter lived here together. “We have always been very close, so it was wonderful that I was able to visit as often as three times a day,” said Peggy.

During 27 years at the Landing, Janet benefitted from all levels of continuing care, from her house on Willow Spring Court to long-term care. Through it all, “Mother always knew me,” said Peggy, who was able to assist her through each stage.

Peggy, an active Williamsburg Landing volunteer, admires her mother’s desire to maintain independence by choosing a CCRC lifestyle that would meet her lifelong needs. “Mother came young enough to make friends, play golf and enjoy the Williamsburg community.”

So it was an easy decision to follow in her footsteps, especially with two children out of state. “Living here is a gift to your children,” she says. Perhaps no one knows that better than Peggy—and the 16 other second-generation residents who live at Williamsburg Landing today.

## SHARING OUR CONTINUUM OF CARE

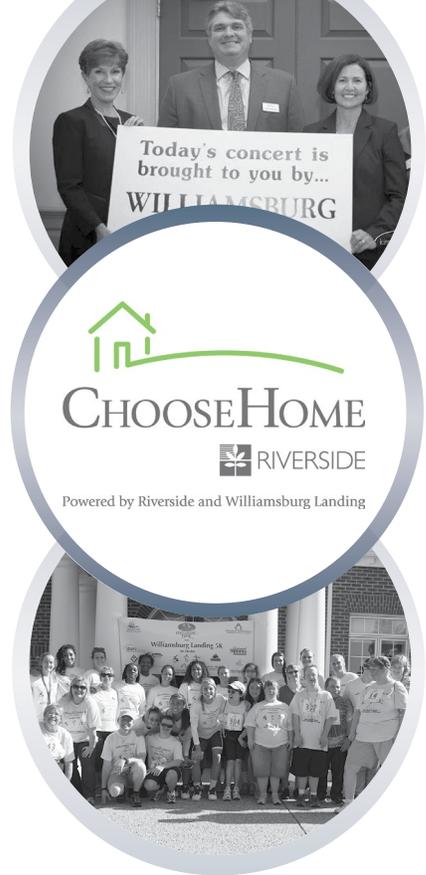
Williamsburg Landing’s circle of influence has expanded beyond our campus to benefit seniors throughout the greater community, especially with the recent rollout of new business ventures.

One of those initiatives is a collaboration with Riverside Health System’s ChooseHome, Virginia’s first community-based, in-home continuing care program. More comprehensive and cost-effective than long-term care insurance, this membership-based opportunity provides the types of health and wellness services offered by Williamsburg Landing to individuals over age 60 in their own homes.

“The greater Williamsburg area has one of the highest concentrations of seniors in Virginia,” said Landing CEO Steve Montgomery. “Our Board has been assessing the growing numbers and realized the need for additional services to help older adults as they age in place. Sponsoring ChooseHome helps seniors stay in their homes but have the guarantee of quality health care if needed.”

In 2015, we also announced a new home health and hospice service line for residents and the local community that will become operational in 2016. “This new venture of skilled home health allows us to extend the continuum of care here at Williamsburg Landing,” said Independent Living Health Services Director Nancy Barhite. “It allows our residents to convalesce in their own homes with oversight by familiar clinicians and can prevent a potential gap in their healthcare.”

Extending the availability of our healthcare services simply makes sense when it comes to enabling older adults to remain at home safely. Whether on the Williamsburg Landing campus or within the greater community, we will provide the same superior caliber of care to all seniors who wish to age in place.



“This new venture of skilled home health allows us to extend the continuum of care here at Williamsburg Landing. It allows our residents to convalesce in their own homes with oversight by familiar clinicians and can prevent a potential gap in their healthcare.”

— Nancy Barhite,  
Director, Independent  
Living Health Services

30 YEARS OF  
GIVING BACK TO  
THE COMMUNITY



**WILLIAMSBURG  
LANDING®**

2015 SOCIAL  
ACCOUNTABILITY REPORT

For the last **30** years, Williamsburg Landing has seen how just a drop of compassion has a far-reaching ripple effect in our community. In 2015...

Residents volunteered **10,265** hours in the greater Williamsburg community.

Employees and board members volunteered **4,059** hours.

and a total of **61** local organizations were served by Williamsburg Landing.

## Did you know...

- Williamsburg Landing's 6th Annual 5K Run for Arc raised \$14,000 ... a six-year grand total of \$106,000.



- 25 is the number of years Williamsburg Landing has partnered with the Williamsburg Contemporary Art Center, formerly This Century Art Gallery. Executive Director Tempy Barbu is pictured with staff and board members.

- 230 hours of class time, for 2015 alone, was provided to the Christopher Wren Association through donated classroom space in the Landing Building. Since 2001, Williamsburg Landing has partnered with the CWA, one of the largest volunteer lifelong learning programs in the country. The program is supported by the College of William & Mary.

## Did you know...

- Two new members, Richard A. Costello and David J. Masterson, joined Williamsburg Landing's board of directors. Board member James R. Golden was elected as the new board chair. As a not-for-profit Continuing Care Retirement Community, Williamsburg Landing is guided by a local 18-member volunteer board of directors that includes two voting residents.



- 227 back-to-school supplies were donated by residents for Rawls Byrd Elementary students.

- The American Red Cross collected 52 life-saving units of blood at Williamsburg Landing.



- The James City County Board of Supervisors and Economic Development Authority recognized Williamsburg Landing as the 2014 recipient of the Captain John Smith Award. The award is presented each year by the County's economic development team to an organization, business or individual for exemplary contributions in the JCC business community.

- Williamsburg Landing has been an active member of the Chamber & Tourism Alliance since 1985, participating in committee work and special events for business members.



- 51 Santa sacks overflowing with toys were donated by residents for the Salvation Army and Rawls Byrd Elementary students.

- We partner with Dream Catchers Therapeutic Riding to provide unique equine therapeutic programs for seniors.



## Did you know...

- \$12,954 was raised by residents and employees for the 2015 Williamsburg Walk to End Alzheimer's.



- 35 Williamsburg Symphonia concerts were sponsored by Williamsburg Landing. Music Director Janna Hymes is pictured addressing the audience of Williamsburg Landing residents at Kimball Theatre.



- Through our partnership with the Historic Virginia Land Conservancy, 38 acres of the Landing's 137-acre campus are in conservation easement along the historic College Creek which flows out to the James River.

## Did you know...

- 327 Certified Nursing Assistants from Thomas Nelson Community College and Heart to Heart Career Training Center received on-site clinical training at Williamsburg Landing's Woodhaven Hall.



- Landing chefs participate in local cooking demonstrations and serve as judges in culinary competitions.



- 6 is the number of graduates of the Chamber & Alliance's LEAD Historic Triangle program supported by Williamsburg Landing.



- 1,000+ food items and hundreds of bags of clothing were donated to FISH by residents in 2015.



- Every year residents tutor dozens of children in reading and math at Rawls Byrd Elementary School. Students have received weekly mentoring for the past 30 years.

## Did you know...

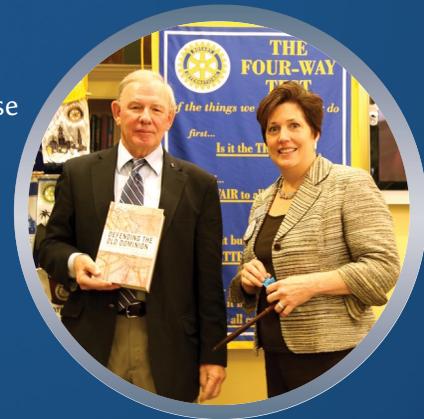
- More than 120 residents, known as the “United Way Stuffers,” stuffed more than 16,000 appeal letters to local citizens for the United Way of Greater Williamsburg 2015 annual campaign.
- .....



- Every year a team of Landing employees devotes a Day of Caring to work on a needed project out in the Williamsburg community.
- .....



- Landing board members give back through numerous hours of volunteer assistance in the community, sharing their expertise and experience.
- .....



- For the past six years, staff members have participated in local organizations such as the local Rotary Clubs and Kiwanis Clubs.
- .....



- The Senior Advocate Network Group has been offering seminars and guest speakers at the Landing for the last 10 years for residents and the greater Williamsburg community.

## 30 for 30...

Below are just 30 ways Williamsburg Landing has experienced the ripple effect of reaching out to volunteer and serve in our community these past 30 years.

---

- The Williamsburg Symphonia
- The Williamsburg Contemporary Art Center *formerly This Century Art Gallery*
- The Historic Virginia Land Conservancy *formerly Williamsburg Land Conservancy*
- The Christopher Wren Association
- The Alzheimer's Association
- The United Way of Greater Williamsburg
- The Riverside Center for Excellence in Aging
- Peninsula Agency on Aging *formerly Senior Services Coalition*
- The Hospice House & Support Care of Williamsburg
- Senior Advocate Network Group
- Thomas Nelson Community College
- Virginia Symphony Orchestra
- The Rotary Club of Williamsburg
- The Kiwanis Club of Williamsburg
- The Rotary Club of The Historic Triangle
- The James City County Rotary Club
- League of Women Voters
- Parkinson's Support Group
- Williamsburg Chamber & Tourism Alliance: LEAD Historic Triangle (LHT) & Community Leadership Service (CLS) programs
- Williamsburg Regional Library "Talks To Go"
- American Red Cross – Williamsburg Chapter
- United Methodist Church Circle
- Williamsburg Men's Fellowship Group
- Williamsburg Opera
- Southern Gerontological Society
- Williamsburg Community Chapel Small Group
- The Arc of Greater Williamsburg
- Pet Therapy
- Williamsburg Area Learning Tree (WALT) classes
- Young Audiences of Virginia





# WILLIAMSBURG LANDING®

800.554.5517 / 757.565.6505  
[www.williamsburglanding.com](http://www.williamsburglanding.com)

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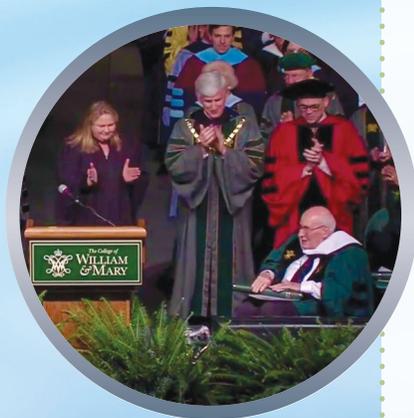
## HONOR ROLL OF DONORS

For 30 years, Williamsburg Landing has provided a current of compassionate care and innovative service to residents navigating the stages of life. That current is powered by strong ripples of giving from our generous donors. Gifts from residents and their family members provide digital heart rate monitors for nursing, benevolence for residents in financial distress, paintings and décor in public spaces, gators for the landscaping crew, gazebos and butterfly gardens. Our employees also benefit from waves of promise delivered through the Kremer Nurse Education Fund, Helping Hands, and the Employee Training and Education Fund.

The influence that radiates from these gifts carries enrichment, excellence, relief and kindness to the places and people that need it most. Thank you.

### Did you know that in 2015...

- The resident-led “Now Hear This” lecture series was launched.
- Resident Thomas A. Graves was awarded an honorary degree from the College of William & Mary for his years of service as their president.



*Williamsburg Landing  
resident Thomas A. Graves*

#### SUSAN CONSTANT

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Mrs. Margaret Bradford  
Rev. Virginia Kreyer  
Mrs. Anne Walker

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*Knit Wits of  
Williamsburg Landing*

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Society of Friends
- Metropolitan Wind  
Symphony
- Williamsburg Landing  
Activities Committee
- Williamsburg Landing  
Men's Club
- Williamsburg Landing, Inc.

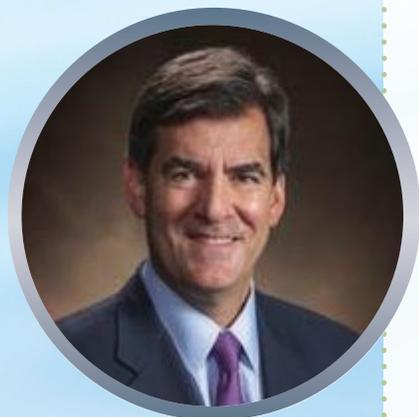
*Every effort has been made to ensure the accuracy of this report. We apologize for any errors or omissions and ask that you contact us with any corrections.*

*Questions? Please contact Sally Wolfe, Senior Director of Development, at 757-253-9677.*

## HONOR ROLL OF DONORS *continued*

### Did you know that in 2015...

- A record four estate gifts were received.
- Information Technologies services were expanded to include television and telephone.



*Williamsburg Landing's donor appreciation guest speaker Mitchell B. Reiss, CEO and President of The Colonial Williamsburg Foundation*

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 Ms. Sharon Powers  
 Ms. Deborah Randall  
 Mrs. Gay Reich  
 Mr. & Mrs. Theodore Reinhart  
 Mrs. Mary Richardson  
 Dr. & Mrs. Kent Roberts  
 ⚓ Mr. & Mrs. Bruce Robertson  
 Mr. & Mrs. Franklin Robeson  
 ⚓ Mr. Jack Robinson  
 Mrs. Shirley Roby  
 Ms. Lagreta Rowe  
 Mrs. Sally Roy  
 Mrs. Shirley Rumer  
 Mrs. Okhui Saprito  
 Mr. Kevin Schall  
 Mrs. Pauline Schaub  
 Mr. Geoffrey Scheepers  
 Mr. & Mrs. Ernest Schillinger  
 Ms. Sylvia Schramkoski  
 Ms. Keshia Scott  
 Mrs. Linda Semmes  
 Ms. Wander Shackelford  
 ⚓ Mrs. Selene Sheriff  
 Mrs. Jane Sieger  
 Ms. Deborah Smith  
 Mr. & Mrs. Dana Smith  
 Ms. Ann Snead  
 Mrs. Polly Spalding  
 Mrs. Vivian Springer  
 Mrs. Ethel Sternberg  
 ⚓ Mrs. Diane Stevenson  
 Ms. Sabrina Strong  
 Mr. & Mrs. John Strong  
 Mrs. Betty Taylor  
 Mr. & Mrs. Chester Tellis  
 Ms. Anita Thiel  
 Ms. Tina Thomas  
 Mr. George Thompson  
 Mr. & Mrs. Thomas Tingle  
 Ms. Amber Turner  
 Ms. Francine Turner  
 ⚓ Mrs. Kathryn VanBourgondien  
 Mr. Leonhard Venne  
 Mr. Matthew Wahleithner  
 Mr. William Wallis  
 Ms. Robin Walls  
 Ms. Juanita Walton  
 Mr. Darryl Ward  
 ⚓ Mrs. Nanc Ward  
 Ms. Jamie Washington  
 Ms. Margaret Watson  
 Ms. Mara Webb  
 Mr. Randolph Weiford  
 Ms. Miriam Wells  
 Ms. Annetta Wharton  
 Ms. Blanca Whittemore  
 Mrs. Almeda Wilking  
 ⚓ Mr. & Mrs. Raol Wolf  
 ⚓ Mr. & Mrs. Ken Wolfe  
 Ms. Susan Wolpmann  
 Mrs. Debra Woody  
 Mr. & Mrs. Barry Worfolk  
 Mrs. Jean Wortman  
 Ms. Angela Wright  
 Ms. Maria Luise Yeatts  
 Mrs. Susan Zakrzewski  
 ⚓ *Annual Fund supporters for 5+ years*

## HERITAGE SOCIETY

Founded by our Board of Directors, the Heritage Society exists to honor those who include Williamsburg Landing in their estate plans. Members of the Heritage Society may have made provisions in their wills or trusts, established a life-income gift such as a charitable gift annuity, included Williamsburg Landing as a beneficiary of a retirement plan, or assigned their future entrance fee refund. Each of these meaningful gestures produces ripples that carry on the legacy of a bright future for Williamsburg Landing.

We invite you to join the Heritage Society by notifying us of your estate plan commitment so we may thank you for your generosity.

Anonymous (13)  
 Estate of Anne Rowland  
 Estate of Anne Walker  
 Estate of Howard Heun  
 Estate of Isabelle Cosby  
 Estate of Marge Muenchow  
 Estate of Mary Barkowski  
 Estate of Virginia Kreyer  
 Evelyn Allen Chamberlin  
     Revocable Trust  
 Fenton MacClain  
     Scholarship Trust  
 Lenore Fenton MacClain Trust  
 Raymond & Alice McKeighan  
 Residents' Association



*Connie Cook shows off her decades-old recipe collection.*

From increasing demand to two kitchen renovations and the addition of the Cove Café, Connie has remained content amidst changes because, she says, “I’m taking care of the residents.”

## COOKING UP CARE FROM THE START

Connie Cook, affectionately known by one resident as “Sweets,” has been in the Landing kitchen since opening day. And she’d intended to be there before that.

While cleaning a local office in 1983, she overheard contractors discussing a new retirement community. “I kept that in my mind for two years,” said Connie, who was also a seasonal baker at Kingsmill’s Conference Center. When Williamsburg Landing was finally built, she was hired on the spot as the baker, a job she still loves today.

Connie’s younger sister Rosalind followed her immediately, and although she missed her first day due to car trouble, which prompts teasing from Connie, she is still a dining room supervisor. They are two of three original employees working here today.

How have they mixed work and family for over 30 years? “I mind my business and she minds hers,” says Connie, matter-of-factly. Raised in Surry with 10 siblings, the sisters learned “the dos and don’ts” of life from their father, a pastor. “We had strict guidelines, so we believe in order. And timeliness—my orders are on time.”

“The community has grown tremendously,” Connie says, and now additional employees assist with baked goods for the dining rooms, Woodhaven, carry-out meals, birthdays, and catered events. “My recipe book is overwhelmed. Betty Crocker helps me a lot,” Connie jokes. “But we are scratch bakers. Everything nowadays is pre-made and frozen, but not here.”

“I enjoy what I do,” says Connie, who especially loves the creativity of seasonal pastries. “The residents look forward to seeing those.” And she looks forward to serving their favorites, like pecan pie on Sundays. “I bake what they like and do it the best I can.”

An expert at converting recipes from 4 servings to 125, Connie’s mottos for success go something like this: “Don’t burn food. Don’t put too much salt in. Just make it good.” And, with inspiring dedication, she does.

## EXPANSION OF A CAMPUS AROUND ITS RESIDENTS

From the dream of a modest 50-home retirement community and a land purchase of 72 acres, the size and landscape of Williamsburg Landing has certainly blossomed during our 30-year history. Today, over 500 residents enjoy living on a beautiful 137-acre campus.

1985's original campus consisted of the Landing Building with 62 apartments, the Moorings cottages, four Manor House apartment buildings, plus dining, medical and soon library facilities. Within 18 months, 225 residents called Williamsburg Landing home.

Major expansion occurred during the 1990s, with adjacent land purchases that led to the construction of Boatwright Circle and Woodhaven, an \$18-million cutting-edge health care complex with greatly expanded nursing home, assisted living and dementia facilities.

Another flurry of construction began in 2003—groundbreakings for the 32-home Edgewood neighborhood, 31 apartments at Earl's Court, and The William A. Doig Health Club & Spa, a fitness, swimming, recreation and spa facility that opened in 2007.

In 2010, discovery of structural deficiencies in the 25-year-old Landing Building led to significant enhancements, optimizing energy efficiency, digital wiring and the life of the community hub. CEO Steve Montgomery commented, "Our residents were not only supportive and understanding throughout the process, but also excited with the outcome," which included a new casual dining space and updates to apartments, the formal dining room, library, auditorium, guest suites, bank, offices, and boutique.

Generous donations in 2014 helped fund the construction of a Landscape Services Building and a new house on Boatwright Circle, becoming the first new buildings on campus for 7 years.

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*Photos (top-bottom):  
The Landing Building,  
Doig Health Club &  
Spa, and Woodhaven*

In 2015, strategic goals and anticipated demand resulted in a proposal for a 100,000-sq.-ft. expansion of Woodhaven, including memory care, residential assisted living, short-term skilled rehabilitation, and an unprecedented licensed adult day program, continuing a 30-year tradition of carefully planned growth.

# FINANCIAL REPORT

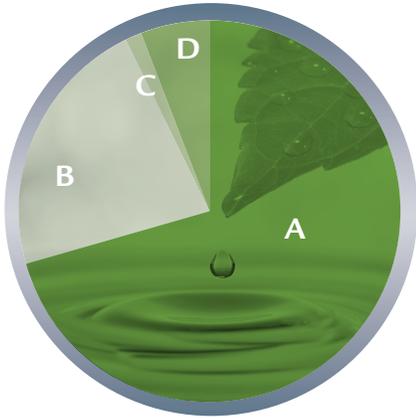
Williamsburg Landing continued to improve its financial strength during fiscal year 2015. Operating results were strengthened by 30 sales in Independent Living. Both total operating revenues and total operating expenses were 1% below budget. We ended the year with 366 days of Cash on Hand and a Debt Service Coverage of 2.05.

Benevolence contributions totaled \$508,541, while \$126,421 in financial assistance from our Benevolence Endowment Fund was provided to 3 residents. Investments have produced a five-year historical rate of return of 7.24%. Average occupancy for 2015 was 84.8% in Independent Living, 90.1% in Assisted Living, 93.4% in Memory Care and 90.5% in Nursing.

Each year, as part of our commitment to financial security for our residents, Williamsburg Landing receives an independent auditor's report. This year, the audit was conducted by CliftonLarsonAllen, an independent auditor with a specialty in the health care industry. The complete report is available upon request.

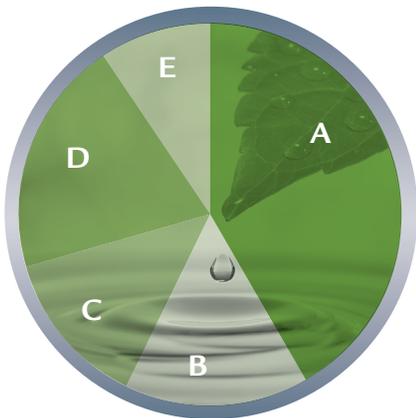


## FINANCIAL REPORT *continued*



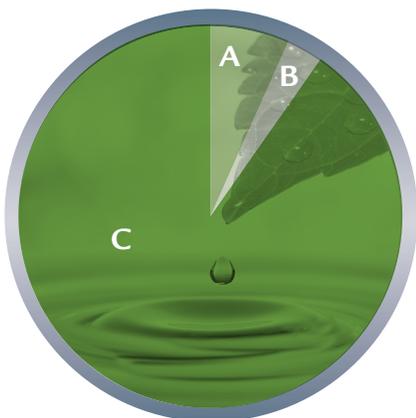
### Operating Revenue:

Resident Services (A)	\$20,680,486
Health Care Services (B)	6,499,098
Investment Income (C)	429,987
Other (D)	1,627,329



### Operating Expenses:

Direct Resident Care (A)	\$12,700,699
General Services and Utilities (B)	4,797,441
Administrative, General and Marketing (C)	4,059,248
Depreciation and Amortization (D)	6,078,405
Interest (E)	2,845,034



### Donations by Area:

Employee Programs and Education (A)	\$37,928
Resident Enrichment (B)	16,843
Benevolence (C)	508,541

## SENIOR LEADERSHIP TEAM



Stephen H.  
Montgomery  
*President/CEO*



Ben Puckett  
*Executive Vice  
President/COO*



Chet Tellis  
*Vice President of  
Finance/CFO*



Kathy Kammer  
*Senior Director of  
Community Relations*



Lisa Bates  
*Senior Director  
of Marketing*



Brandy Day  
*Senior Director of  
Human Resources*



Scott Richardson  
*Senior Director of  
Resident Services*



Sally Wolfe  
*Senior Director  
of Development*

Williamsburg Landing is committed to complying with all laws and regulations pertaining to non-discrimination towards residents and employees and those applying for residency and employment. Resident admission, outpatient care, room assignment, provision of services and caregiver assignment, as well as employee recruitment, conditions of employment or determination of employment shall be determined without regard to race, creed, national origin, age, sex, religion, disability, marital status or veteran status.

Williamsburg Landing may use demographic information about you such as your age and gender in order to contact you for the purpose of raising money for our community. In every written fundraising communication, we will provide you with an opportunity to elect not to receive further fundraising communications. Opting out of receiving future fundraising communications will in no way affect any access or level of care available to you. Once you opt out, we will avoid contacting you unless you at a later time contact us and ask to be added back to our fundraising contact list. If you want to opt out of receiving future fundraising mailings at this time, please call Sally Wolfe at 757-253-9677 or send an email to [swolfe@williamsburglanding.com](mailto:swolfe@williamsburglanding.com).



## BOARD OF DIRECTORS

Photo front l-r: Lois Polifka; Audrey Smith; Rich Costello; Beth Davis;  
Jim Golden, *Chair*; Tracey Dowling; Jim Easton; Kerry Mellette; David Masterson  
Photo back l-r: Bob Singley; Jack Edwards; Al Woods; Paul Gerhardt, *Counsel*;  
Chuck McGary; Bud Robeson; Ron Lodzieski  
Not pictured: Cathy Chaplain; Ginnie McLaughlin



## OUR MISSION

Williamsburg Landing offers excellent facilities and services, promotes independence and diversity, provides access to a continuum of quality health care services, and actively collaborates with the broader Williamsburg community.

## OUR VISION

Williamsburg Landing is the senior community of choice: celebrating excellence, valuing diversity, pursuing innovation, and caring for each other.



**WILLIAMSBURG  
LANDING®**

800.554.5517 / 757.565.6505  
[www.williamsburglanding.com](http://www.williamsburglanding.com)

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Williamsburg, Virginia 23185

