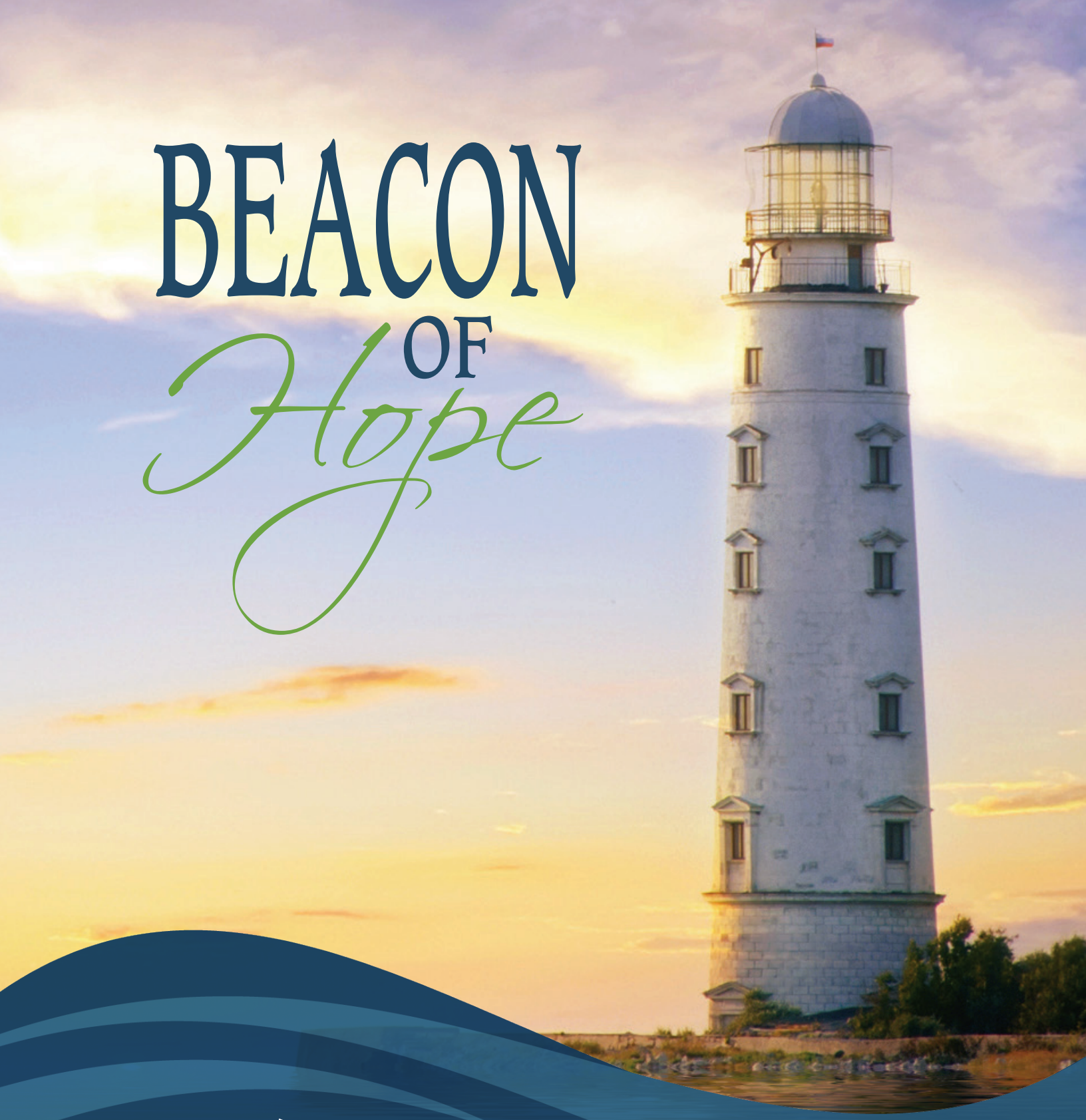
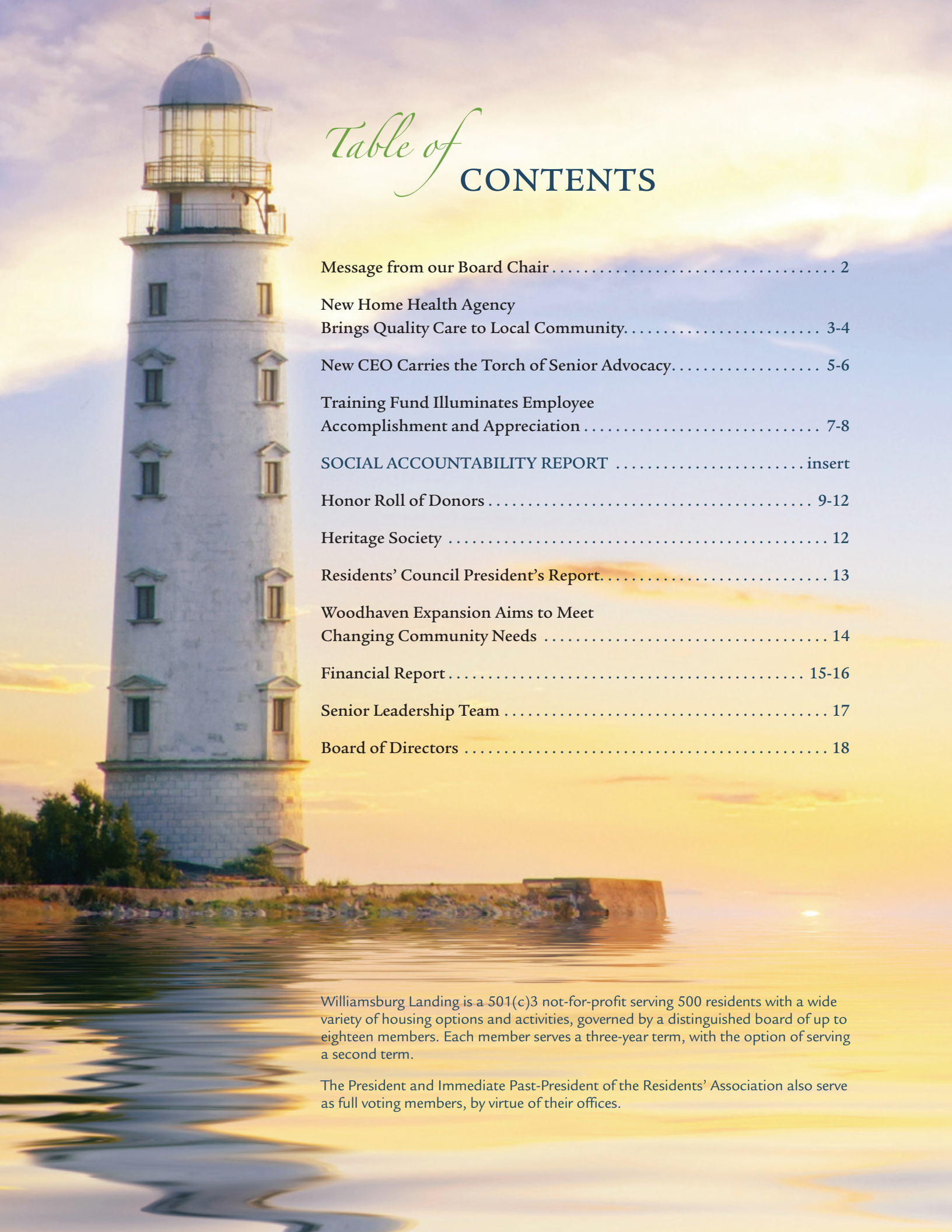
BEACON OF *Hope*



WILLIAMSBURG LANDING®

2016 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.

Message from our BOARD CHAIR

Williamsburg Landing is a special place where we celebrate excellence and care for each other. We look back with pride on the improvement of our community over the last thirty years, but we know that we cannot rest on our laurels. The expectations of our residents, delivery of health services, technologies available, and needs of the senior community in Greater Williamsburg are all changing, and we must keep up.

The independent board of directors that guides our non-profit corporation recognizes the need to offer excellent facilities and services, promote independence and diversity, provide access to a continuum of quality health care services, and actively collaborate with the local senior community. We want Williamsburg Landing to be recognized as both the senior community of choice and the employer of choice. We celebrate the generosity of our donors and the outreach of our residents and staff that make our community a beacon of hope.

In 2016 we took important steps to set the course for years to come. Upon Steve Montgomery's retirement after years of distinguished service, a board committee chaired by Beth Davis conducted a highly successful national search for a new CEO, and we were delighted to find Greg Storer. Greg has an exceptional background across the spectrum of health care delivery in areas such as community leadership and national accreditation, and he has hit the ground running.

Early in 2016, the board made a key decision to build a new memory care center, increase our assisted living capacity, and renovate the Woodhaven facility to provide additional skilled care beds. Adjusting our services in this way provides the opportunity to meet our resident needs and deliver best practices. We moved quickly to break ground in early summer, taking advantage of favorable weather and financing. With construction well underway, memory care completion is expected by November 2017 and the assisted living expansion should open by February 2018.

The memory care building will provide space for new adult day services, meeting the needs of residents and the Greater Williamsburg community. In hopes of assisting those with financial need, we have launched a fundraising campaign to which, I am delighted to say, our entire board and leadership team have contributed.

Jim Golden, *Chair*

Reaching farther, shining brighter

NEW HOME HEALTH AGENCY BRINGS QUALITY CARE TO LOCAL COMMUNITY

For seniors who have difficulty leaving their homes, the process of receiving adequate health care can be a struggle. To those who find themselves in that situation, Williamsburg Landing's new home health agency may be a welcome light breaking through some very dark clouds.

The official launch of Williamsburg Landing Home Health in 2016 brought the availability of skilled home health services to both our residents and residents of the broader Williamsburg community. This includes access to nursing, therapies (physical, occupational and speech), assistance from a home health aide, and social work as needed—all from the comfort of one's home.

The realization of a dream several years in the making, the new home health service line originated with a 2012 strategic goal to "develop home- and community-based services leveraging Williamsburg Landing's resources," says Home Health Administrator Lisa Fragala, BSN, RN. After a team explored the idea of a "Continuing Care Retirement Community without walls" in 2013, home health development talks began the next year, under the advisement of Senior Options of Westminster Canterbury.

By early 2015, following a feasibility study and pro forma, Williamsburg Landing's Nancy Barhite, RN began laying the groundwork to establish the agency. Today, she oversees the program as Williamsburg Landing's Director of Home and Community Based Services.

Lisa Fragala came on board as the agency's clinical team leader during its start-up phase in October 2015, before recently assuming the role of administrator. A registered nurse with 28 years of experience, her career began in critical care, telemetry, and medical/surgical care before she transitioned to home health and hospice care in 1994. Lisa, now a seasoned expert, has

worked in the field ever since, including her role as manager for Sentara Hospice of the Greater Peninsula. "It was a great opportunity for me to join Williamsburg Landing and a privilege to contribute to the founding of this important service," she said.

"After many months of collaboration, licensure applications, survey visits, policy writing and review, Williamsburg Landing Home Health completed a deficiency-free survey, becoming accredited by the Community Health Accreditation Program (CHAP) and certified for Medicare on June 17, 2016," said Lisa. Services began immediately, with billing capability initiated by year-end.

What does the future hold for this promising service line? Lisa says, "Our goal is to grow the business and service for both on-campus and off-campus residents, while maintaining the quality service and great reputation that Williamsburg Landing carries."

"Thanks for setting up Home Care for Mom — it made a difference to have them go to the Emergency Room with her. Your 'can-do' attitude says good things about your company and makes us feel comfortable entrusting Mom's care to you."

— Family Member of a Williamsburg Landing Home Health Patient

Lighting the way

NEW CEO CARRIES THE TORCH OF SENIOR ADVOCACY

2016 marked a new era in leadership for Williamsburg Landing, following the retirement of CEO Steve Montgomery in June. "I'm extremely proud and humbled to be President and CEO," said Greg Storer of his new role as the fifth to hold the position. "I've thoroughly enjoyed my first year here. Mr. Doig and Steve Montgomery have really developed a wonderful community and I'm excited to have the opportunity to continue to grow it."

Greg and his wife Julie relocated from Ohio last May. "We love Williamsburg," he said. "We're extremely pleased that we made the move." Greg is fond of not only the decrease in snow, but also the area's support for seniors. "It's a great community. I'm very impressed with the amount of services—and how well those services are connected to one another. I think Williamsburg Landing is a vital part of that and I'm excited to be part of a community that focuses so much attention on the needs of seniors."

In addition to becoming one of the locals, Greg says he's settling into his professional responsibilities well. "I'm surrounded by a lot of really good people who've been here for quite a while and have a lot of institutional knowledge," he said. "They're all really talented."

Throughout his own extensive experience, Greg has served in executive leadership for a variety of senior living organizations, but he's already noticed that Williamsburg Landing stands out. "The residents by far are the most engaged group that I've had the fortune to be around in my 33 years in this career," he said. "Oh, they're phenomenal. I bounce ideas off of

them and rely on their knowledge and input quite a bit. Throughout the committee structures, they're very active. They're committed to this community and want to see it continue to be progressive and grow. In addition to that, we have wonderful teammates that work here and do such a great job providing service to our residents."

Reflecting on the highlights of 2016, Greg says, "Our home- and community-based services division and our Medicare-certified home health program are strong, successful developments and reflect an aggressive area of growth. It provides a valuable service to our residents that live in this community and the ability for us to extend those home health services to the greater Williamsburg area."

In addition to overseeing the extension of services, one of Greg's first tasks has been to guide Williamsburg Landing through the growth of its physical campus, with an expansion at Woodhaven well underway. "Our construction project is moving along very, very well," said Greg. "We're pleased with where the project is and we will likely take possession and occupancy of at least the memory care house and the adult day center in 2017."

Looking ahead on the new CEO's agenda, a newly developed talent management strategy is a top priority. "The increase in the number of baby boomers moving into senior communities, countered with the number of people that are not in the job force and the developing competition in our area, it's extremely important for us to continue to focus on our current teammates and then develop a strategy to become the employer of choice," he said.

"We've developed a very comprehensive talent management strategy with four parts: recruitment, onboarding, retention and leadership and education," he continued. "This is one of our primary focuses. Our staff is our most valuable resource, by far." That value has been reflected in the extreme success of the newly formed Steve Montgomery Employee Training and Education Fund. "It's a great benefit to our current employees and I think a really good vehicle to attract new staff," said Greg.

"Through the board's direction, one of our strategic initiatives is to continue to find ways to be a valuable partner in the community and an advocate for seniors," he said. "I think a good example of that is the adult day center we're starting. It gives us the ability and opportunity to reach beyond the walls of our campus, and we will continue to look for ways to do so. Our partnership with the Williamsburg Community Foundation to sponsor an annual senior services award is another example of our commitment to continue to grow, both on and off our campus."

Residents are supportive of these outreach efforts, says Greg. "We are a very resident-driven community, and I think we do a great job communicating with each other. Our residents have friends who live outside of Williamsburg Landing and they love when we go out into the greater community. They want to see us continue to do the right thing. What I would like for us to do is to truly become the expert...so that anyone can reach out to us and we can be a helpful resource to them."

Seeing dreams in a new light

TRAINING FUND ILLUMINATES EMPLOYEE ACCOMPLISHMENT AND APPRECIATION

In the years since residents Hank and Joyce Kremer generously established the Nurse Education Fund at Williamsburg Landing in 2008, this successful effort to provide training and encourage compassionate care has evolved into a wider opportunity available to all employees. In the spring of 2016, the Steve Montgomery Employee Training and Education Fund was created, named in honor of our retiring CEO to recognize his leadership and support of Williamsburg Landing employees.

Since that time, thanks to a generous outpouring of support from donors, nearly $105,000 has been raised and utilized by employees all over our campus, further enhancing the professional expertise of our workforce. One such staff member who has benefited from the initiative is Director of Accounting Services Juanita Parks, CPA. Juanita recently earned her Certified Public Accounting designation, passing all four sections of the exam on the first try—a feat accomplished by less than 30 percent of those who attempt it.

With 17 years of accounting experience, Juanita began working as a bookkeeper in college, even before she earned her bachelor's degree in 2002. Hired as Williamsburg Landing's accounting manager in June of 2014, she was promoted to director less than a year later, in early 2015.

That fall, without telling anyone at work, Juanita took the first part of the CPA exam, after studying *Gleim CPA Review* textbooks extensively. "Since the pass rate is under 50 percent, I wanted to ensure that I studied the appropriate time and understood the material before taking the exam," she said. She proceeded to the next sections, tackling one each quarter and finishing in July 2016, at which point she let everyone in on her exciting achievement.

"I felt honored and appreciated by Williamsburg Landing, and I am so thankful. Becoming a CPA has given me a confidence in myself that I lacked."

— Juanita Parks, CPA,
Director of Accounting Services

Choosing to pursue this professional designation was a decision largely motivated by Juanita's family. "My father was an accountant and died at the early age of 46," she said. "He was never able to take the exam and I knew it would have been something he would want me to accomplish if he were alive to see me grow up. My stepfather, who passed away in 2012, always talked about it—he too would have been proud. I also wanted to show my son that you can be what you want to be if you work hard enough to accomplish it. He watched me study and saw the dedication I put in during the study times."

But Juanita also felt a prompting from within, one that was based on more than simply improving her marketability. "I wanted to challenge myself," she said. "I was afraid to take the exam after I graduated from college because of the fail rates—I didn't have any confidence in myself."

When the Employee Training and Education Fund reimbursed Juanita for the high cost of the exams and review courses, she was taken by surprise. "It certainly helped me financially," she said. "I felt honored and appreciated by Williamsburg Landing, and I am so thankful. Becoming a CPA has given me a confidence in myself that I lacked." She lightheartedly adds, "I have also received a higher respect from people when they see those three initials!"

Honor roll OF DONORS

For seniors in search of the perfect place to call home, Williamsburg Landing serves as a beacon of hope, guiding residents to a destination where, at last, practicality and joyful living meet. Gifts from our generous donors have enabled our community to beam with beautiful surroundings, top-of-the-line facilities and a vibrant lifestyle, while seamlessly providing a necessary haven of security, health, and capable care for every aspect of life.

Because of your giving, those who live and work here—and those in our greater community—know where to turn when the path becomes unclear. Because of your support, a bright future is found at Williamsburg Landing. We thank you.

SUSAN CONSTANT

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Residents' Association
Estate of Jeanne Porter
Estate of Eleanor 'Sally' Gilpin

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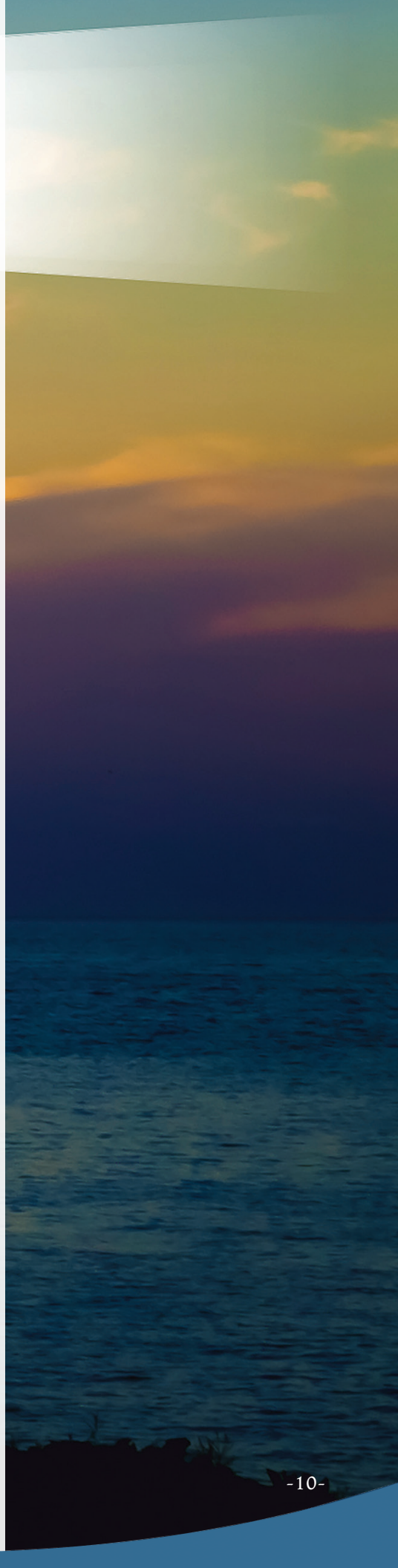

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⚓ *Annual Fund supporters for 5+ years*

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 provisions in their wills or trusts, may have established a life-income gift such as a charitable gift annuity, or may have included Williamsburg Landing as a beneficiary of a retirement plan. We also recognize those who have assigned their future entrance fee refund to 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 (16)
Estate of Anne Rowland
Estate of Anne Walker
Estate of Eleanor 'Sally' Gilpin
Estate of Howard Heun
Estate of Jeanne Porter
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

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.

Residents' Council

PRESIDENT'S REPORT

RESIDENTS' COUNCIL

Pat Marmion; Carol Cashen, *Secretary*; Robert Van Duyne, *Vice President*; Marie Sexton; Helen Phillips; Anton Campanella, *President*; Carol Cini; Jim Parkey, *Treasurer*; Jean Bodine; Pressly McCance; Bill Kaufmann; Gerry Smith

Since the founding of Williamsburg Landing, residents have always been a guiding force in its direction, and we are honored to be partners in its success today. The Residents' Association, comprised of all who live here, is represented by our elected Residents' Council, ensuring a voice for our opinions, a connection with administration, support for each other, and opportunities to serve our community.

In 2016, we appointed a liaison from the Residents' Council to each of the resident committees and management teams. This year, we are forming a team of residents to determine how to best interface with the growing Woodhaven entities such as Home Health and Adult Day.

I am particularly proud of the many Flea Market volunteers who help residents between moves and work hard to make donated items salable, in turn benefiting worthy functions like the library, Benevolence Fund, and *The Tatler*.

Our resident-only town hall meeting was very well attended and generated more than 160 questions submitted in advance. Each question was assigned to a council member, who researched the issue and reported back. The meeting demonstrated Williamsburg Landing residents' high level of involvement and interest, and served to inform the next several meetings of the entire association.

I had the pleasure of attending weekly Woodhaven construction meetings to remain apprised of its progress, as well as bi-weekly meetings with our new President and CEO, Greg Storer. Thank you to Greg and the leadership team for cultivating a successful relationship with residents and continually seeking our input.

Many thanks to my fellow residents for actively, responsibly and supportively keeping our community on the best possible course.

Anton Campanella, *President*

Navigating forward

WOODHAVEN EXPANSION AIMS TO MEET CHANGING COMMUNITY NEEDS

Throughout our history, Williamsburg Landing has been attuned to the evolving needs of seniors, anticipating and carefully planning how we can best serve our community. 2016 was no exception, as 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 began to take shape on campus. This significant project, approved in 2015, positions us to innovatively address predicted demand and strategic goals, even in the context of the greater local area.

Early last year, design work became more detailed and cost projections more specific. Based on these plans, the board authorized an early release on site work, leading to tree clearing and grading in early July as the contract was finalized. In the meantime, an additional parking lot behind Woodhaven was built to allow for extra parking during construction.

Williamsburg Landing executed a formal contract with Henderson, Inc. in October, and construction began immediately on the prepared sites for both the new memory care building and the assisted living addition. Intense work continued through the end of the year, resulting in considerable progress. The floor slab, basement walls and structural steel columns of the memory care facility were constructed, while in the assisted living section, basement excavation and steel column footer installation took place.

"A tremendous amount of hard work and very long hours have brought us to where we are today," said Randy Retan, project manager. "We have a great design team (both consultants and Williamsburg Landing employees), a great contractor and unqualified support from senior leadership.

"The board of directors took a risk," he continued, "allowing us to start without a formal contract so that we could avoid the worst of winter weather when we were at a point where it could have delayed the project for weeks. That gamble has paid off in spades as we are now seven months into construction, right on schedule and right on budget."

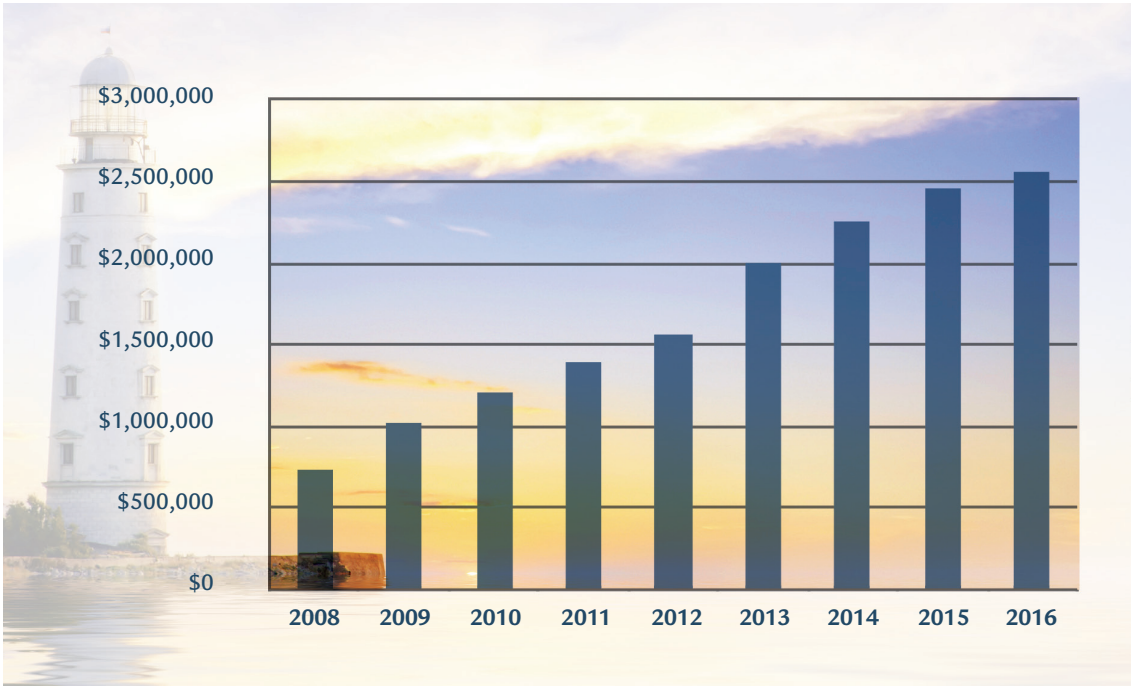
2016 FINANCIAL REPORT

Williamsburg Landing continued to improve its financial strength during fiscal year 2016. Operating results and occupancy were strengthened by 30 sales in Independent Living. Both total operating revenues and total operating expenses were within 3% of budget. We ended the year with 313 Days Cash on Hand and a Debt Service Coverage of 1.60.

Our Benevolence Endowment Fund provided $128,834 in assistance to 3 residents during 2016. Investments have produced a five-year historical rate of return of 8.95%. Average occupancy for 2016 was 85.5% in Independent Living, 89.4% in Assisted Living, 92.7% in Memory Care and 84.6% in Nursing.

Each year as part of our commitment to financial security to 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.

BENEVOLENCE GROWTH SINCE 2008



2016 FINANCIAL REPORT *continued*

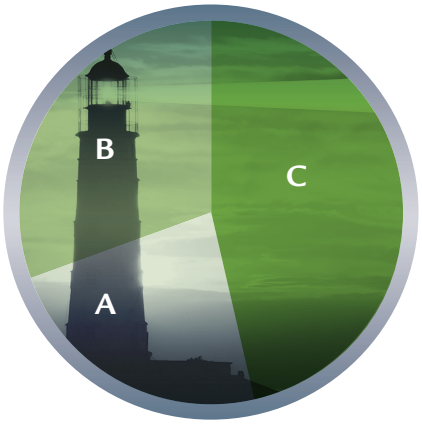
Operating Revenue:

Resident Services **(A)**	$21,478,000
Health Care Services **(B)**	6,788,000
Investment Income **(C)**	494,000
Other **(D)**	1,197,000

Cash Flow from Operations
Net Entry Fees Collected: $4,333,000

Operating Expenses:

Direct Resident Care **(A)**	$13,162,000
General Services and Utilities **(B)**	4,798,000
Administrative, General and Marketing **(C)**	4,484,000
Depreciation and Amortization **(D)**	6,471,000
Interest **(E)**	2,335,000



Donations by Area:

Employee Programs and Education **(A)**	$90,300
Resident Enrichment **(B)**	118,445
Benevolence **(C)**	182,163

Senior Leadership TEAM

(l-r): Ben Puckett, *Executive Vice President/COO*; Scott Richardson, *Senior Director of Resident Services*; Lisa Bates, *Senior Director of Marketing & Sales*; Gregory Storer, *President/CEO*; Sally Wolfe, *Senior Director of Development*; Chester Tellis, *Senior Vice President of Finance/CFO*; Kathy Kammer, *Senior Director of Community Relations and Communications;* Brandy Day, *Senior Director of Human Resources* (not pictured)

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.

Board of DIRECTORS

(Front l-r): Anton Campanella; Ted Juraschek; Audrey Smith; Tracey Dowling; Ginnie McLaughlin; Jim Golden, *Chair*; Karen Riordan; Linda Stallings; Cathy Chaplain; Bob Singley
(Back l-r): Rich Costello; Jack Edwards; Lois Polifka; Al Woods, Paul Gerhardt; Bud Robeson; Larry Foster; Jim Easton

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.

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

5700 Williamsburg Landing Drive
Williamsburg, Virginia 23185

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