

# CREATING IMPACT THROUGH PHILANTHROPY

MAXIMIZING THE GOOD WE DO TOGETHER



ASBURY  
FOUNDATION   
2022 ANNUAL REPORT

# A LETTER FROM THE PRESIDENT

Today I am pleased to share with you this celebration of the impact that is made when philanthropy and community intersect to make the exceptional happen. This year, you've given others the gift of health, independence, and opportunity. This is your impact.

In this report, we'll highlight some of the amazing things your giving has made possible across the Asbury system. In 2022, our donor family provided nearly **\$10.8 million** in gifts across our key areas of focus within the Asbury Foundation's Strategic Plan: Benevolent Care, Capital, Innovation, Scholarships & Education, and Special Programs.

The Asbury Foundation's value proposition of **aligning donor passion with transformational opportunities**, reflects our commitment to being a partner for donors who are seeking ways to turn their personal interests into projects that create opportunities for others.

Your impact included **\$4.8 million** in Benevolent Care, underwriting your community's ability to support residents who have outlived their financial resources. Your generosity added up to more than **\$3 million** in funding for endowments that fuel associate education, ecology efforts and other critical projects. Gifts to Special Programs totaled **\$3.5 million**, supporting a multitude of lifestyle enhancements for residents. And your support for brain health programming has helped to elevate Asbury as an industry leader in neurological disease support and is foundational to making each Asbury community a "well-being" destination.

And for the fifth year, Asbury Foundation maintained our **Candid Platinum Seal of Transparency**, Candid's highest level of transparency recognition for foundations.

I hope that this report inspires you, our incredible family of donors, to continue this journey with us. Together, we're forging exciting new paths that will create many better tomorrows. This is your impact.



J.D. SHUMAN  
PRESIDENT & CEO | ASBURY FOUNDATION





# ASBURY FOUNDATION BOARD OF DIRECTORS

Asbury Foundation's volunteer Board members provide invaluable guidance and dedication. Through their work, they ensure that we deliver on our Guiding Principle to do all the good we can with integrity, transparency and grace with the provision of benevolent care and the creation of projects that enhance the lives and well-being of residents and associates.



Carolyn Stamatakis, Chair

Carolyn serves as Board Chair for the Asbury Foundation. For several decades, she has demonstrated her commitment to the Mission of Asbury Communities and the Asbury Foundation through a wide variety of governance roles. Carolyn has experience in financial advising and philanthropic work. She has previously served on the Board of Directors for Asbury Communities, including as its Chair. Most recently, Carolyn was an integral part of the development of a new strategic framework for the Asbury Foundation, furthering the organization's ability to make donors' passions a reality through philanthropy.

## TABLE OF CONTENTS

- Asbury Foundation Board of Directors.....3
- Your Choice Makes an Impact.....4
- Asbury Foundation Philanthropic Impact.....5
- Meet the Graduates: Scholarship Endowments.....6
- The Impact of an Endowment.....8
- Investing in Our Future.....10
- Meet the Foundation Team.....11

## 2022 - 2023 Board Members

**Dr. Bob Burke**

**Loann Burian**

**Linda Woodin**

**Mary Anne Morefield,  
Bethany Village Resident**

**Richard C. Stang, CPA**

**Sara Tapiero**

**Dr. Richard Vert,  
Asbury Methodist Village Resident**

**J.D. Shuman, Ex Officio Voting**

**Doug Leidig, Ex Officio Voting**

YOUR CHOICE MAKES AN

# IMPACT

Each year, donors make a very personal choice—to give what they could keep, so that others might benefit.

In 2022, the impact of your choice resonated throughout Asbury Communities. Donor support in 2022 totaled nearly \$10.8 million, helping to create new opportunities and exciting community enhancements across the system. Virtually every resident and associate has been touched by your kindness.

Your generosity supported our key areas of focus — Benevolent Care, Capital Projects, Innovation, Scholarships & Education, and Special Programs — fueling programs enhancing resident well-being, continuing education for associates, funding physical improvements to buildings

and landscapes, and supporting Asbury’s ability to achieve its ongoing mission. And as always, you continued to show your generosity toward benevolent care, our signature fund which helps recipients overcome financial hardship and maintain their quality of life as they age.

We hope you will see in the pages of this report how each inspiring story and achievement is made possible because Asbury Foundation’s donor family made the choice to support their passions and make transformational experiences happen for others.

As nursing scholarship recipient Tabitha Crocker says, “I can focus on my education without the financial burden that comes with attending college. I will be forever grateful for the opportunities the Asbury Foundation has given.”

# 2022 ASBURY FOUNDATION PHILANTHROPIC IMPACT

# \$10,750,244



**BENEVOLENT CARE**  
**\$4,835,953**

Benevolent care underwrites your community's ability to support eligible residents who have outlived their financial resources. It is the centerpiece of Asbury's faith-based legacy to do all the good we can.

*"More than anything, benevolent care represents the incredible support and love that this community shows to each other, particularly those in need."*

– Lenor Hersey,  
Bethany Village resident



**CAPITAL PROJECTS**  
**\$1,462,014**

With enhancements ranging from brain health and wellness programming to a dog park and a butterfly garden, capital gifts empower communities to build new spaces and programs that serve residents and families today and into the future.

*"This effort really did enhance community unity."*

– Carol Cressler,  
Bethany Village resident and  
Co-Chair of the Building Our  
Community Capital Campaign,  
which funded the Richard D. Rife  
Center, John and Annie's Bistro  
and Clyde's Pub.



**SCHOLARSHIPS  
& EDUCATION**  
**\$582,630**

Through associate scholarships, donors support those special individuals who meet their needs day in and day out. These gifts are a key way we strengthen Asbury's workforce by recruiting and retaining top talent.

*"It's been a long journey, but I'm so grateful to have been able to achieve my dreams."*

– Joana Mante, RN and  
multiple scholarship recipient,  
Asbury Methodist Village



**SPECIAL PROGRAMS**  
**\$3,549,497**

Gifts for special programs enhance Asbury's communities in ways that are as unique as the individuals who make them – from public art installations to intergenerational programming and more.

*"I feel very invested in this community and this is a beautiful way to memorialize him and keep his story alive."*

– Don Grumblatt, Springhill  
resident, on the Remembrance  
Garden created to honor his  
brother-in-law.



**INNOVATION**  
**\$320,150**

As a technology-centric organization, innovation is central to Asbury's work. From enhanced home-monitoring safety systems to new hearing technology at all communities – your gifts to support innovation help us create the communities of tomorrow.

*"This is the essence of person-centered care."*

– Katie MacKenzie, Director  
of Resident Life at Springhill,  
on the EverSound hearing-  
enhancement technology.



# MEET THE GRADUATES



ASSOCIATE SCHOLARSHIPS BUILD THE NEXT GENERATION OF CLINICAL LEADERS

According to LinkedIn Learning research, one of the top reasons people choose to join and stay with an organization is the opportunity for career development and learning. And in today's challenging job market, providing opportunities for employee growth is a key component of recruiting and retaining top talent. Asbury makes a priority of caring for its associates so that those associates can, in return, care for you. One important way we do this is by providing scholarships

for associates to pursue career growth through education. **Across the Asbury system, a total of \$75,000 in scholarships was distributed to 25 associates in 2022.** Asbury Foundation donors support this mission by funding associate scholarships.

This investment in associates also benefits residents. It helps Asbury fill critical healthcare positions and provide a career pathway to associates who want to stay with an organization where they find value and meaning in their work.

A key strategic area of focus for Asbury Foundation is providing scholarships, education, and support for associates. And donor passion for supporting the associates who serve them day in and day out translated into more than \$500,000 in 2022.

This support for education contributes to more satisfied and better trained associates and is just one of the many reasons that nearly 90 percent of Asbury associates say their work has "special meaning."

Last year, 25 associates at four Asbury communities benefited from scholarship funds.

"Our recruiters are thrilled to be able to integrate Asbury scholarships into the overall benefit narrative about Asbury," says Helene Perdue, Director of Talent Acquisition and Development at Asbury. "It's clearly a differentiator in today's competitive labor market."

Anthony Durski, recently promoted to Director of Clinical Education at Asbury Methodist Village, completed his Master of Nursing degree with assistance from an Asbury scholarship.

"The advancement in my career could not have happened without the gracious support of Asbury residents, the Asbury organization and their commitment to associate growth," says Anthony. "The conversations and guidance I received from residents during my studies emphasizes the dedication they have for associate growth and prosperity."

## Associates Benefitting from Scholarships by Community

Asbury Methodist Village: **\$46,960 | 16 recipients**

Asbury Solomons: **\$12,500 | 3 recipients**

Bethany Village: **\$14,500 | 4 recipients**

RiverWoods: **\$1,363 | 2 recipients**



**Jodi Bales | Bethany Village**  
Licensed Practical Nurse (LPN)  
Health Care Center



**Chinar Beknazarova**  
**Asbury Solomons**  
Geriatric Nursing Assistant (GNA)  
Health Care Center



**Tabitha Crocker**  
**Asbury Solomons**  
Geriatric Nursing Assistant (GNA)  
Health Care Center

*"The [Scholarship] committee was my biggest cheerleader. I am grateful for the opportunity the grant bestowed on me."*

- Jodi Bales

*"My studies are helping me provide better care to residents."*

- Chinar Beknazarova

*"I can focus on my education without the financial burden that comes with attending college. I will be forever grateful for the opportunities the Asbury Foundation has given."* - Tabitha Crocker



**Anthony Durski**  
**Asbury Methodist Village**  
Director of Clinical Education



**Ndeye Mboup**  
**Asbury Methodist Village**  
Geriatric Nursing Assistant (GNA)  
Health Care Center



**Jayme Opdyke | RiverWoods**  
Licensed Practical Nurse (LPN)  
Adams Center Rehabilitation

*"My studies are helping to develop associate programs and education opportunities, including customer service, infection prevention, and mental health awareness."*

- Anthony Durski

*"Education is the most important tool you can receive. I've always had empathy and respect for those in my care, but through my education, I've gained even more. I look forward to putting into practice all that I've learned."*

-Ndeye Mboup

*"I have seen firsthand how wounds heal with early detection and the proper treatment. Knowing the right method of care is the key to a successful outcome."*

-Jayme Opdyke



# THE **IMPACT** OF AN **ENDOWMENT**

The gift of an endowment means the programs and passions you care about will continue to thrive long after your lifetime. Endowment gifts are invested in perpetuity, and the principal is not spent. Only the income and appreciation are used to create a steady stream of support for a favorite cause.

The power of your gifts can be seen in the look of appreciation from a resident's family member, knowing their loved one's lack of resources will not affect their care. It can be seen in the

exuberance of an associate empowered to pursue higher education through an associate scholarship. It is visible in the joy that residents find in sharing a sunny afternoon at the community's endowed dog park or memory garden.

From benevolent care to associate scholarships to special projects, endowments support the things donors love about their community, ensuring it will be available for decades to come.



**Judi Jones | Asbury Solomons**

## Supporting Your Friends & Neighbors

Judi Jones first became involved with the Asbury Foundation before she even moved to the community. She used our Real Estate Partnership Program to help facilitate her move in 2016. That experience cemented a relationship with the Asbury Foundation and has allowed her to make an impact on many areas of the community she loves, wherever it is needed most.

Judi's generosity has supported a general scholarship fund, conservation landscaping, benevolent care, and the community pet park — making an impact on vast numbers of residents and associates.

And Judi's impact will continue for generations to come through her creation and funding of the James and Judith Jones Endowment Fund. This personal endowment, named for Judi and her late husband James, will continue her tradition of giving to the areas of most need, including benevolent care.

Personal experience drives Judi's affinity for benevolent care. Her mother moved to another retirement community under a similar program, and Judi has never forgotten the peace of mind that it brought her family and the dignity it provided for her mom.

"I never feel alone here," says Judi. She experiences the kindness of friends and neighbors daily and feels "it would be devastating for someone to have to move due to financial hardship."

Judi's generosity and compassion will ensure that many in the Asbury Solomons community have enhanced surroundings, services, and amenities for decades to come.





## Betty Petrick | Normandie Ridge

### Paying Kindness Forward

“I truly believe that I have become a better person since coming to Normandie Ridge,” says resident Betty Petrick. “Every day I see examples of courage, faith, and caring.”

It was those examples of fellowship and caring and her wish to leave a mark on her

community that led Betty to establish an endowment in 2022. She was excited to give back to a community she describes as having given her “a life to celebrate in my waning years.”

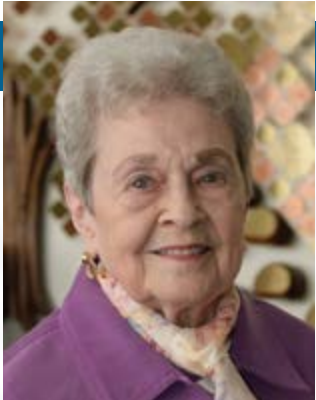
During her 10 years at Normandie Ridge, Betty, who just celebrated her 99th birthday, has supported many campus initiatives.

“Normandie Ridge has done so much for me,” says Betty. “I feel so blessed and would like to try to make the place even better.”

Betty’s desire to make Normandie Ridge “even better” will continue long into the future through her creation of the Normandie Ridge John Petrick Jr. and Elizabeth R. Petrick Enhancement and Environment Fund. Named for Betty and her late husband, the endowment will begin funding upon Betty’s death, meaning her great love for the community will live on.

Betty’s commitment to the environment includes her work on green issues with fellow residents. She’s currently working to educate residents on “Demystifying Recycling,” through a handout she’s writing and educational presentations to residents. But she’s keeping mum on how her endowment will take shape on campus, hoping to “surprise people as things happen.”

She is excited about the many ways her gift will make a difference: “So many times, I have looked at something and said to myself, ‘Why doesn’t somebody do something about this,’” says Betty. “It is a great feeling to know that I am such a somebody!”



## Phyllis Schweizer | Bethany Village

### Providing Engaging Spaces

When Phyllis Schweizer moved to Bethany Village 25 years ago, she quickly got involved with the Care Assurance Program and Development Committee (Benevolent Care). She has generously supported Care

Assurance and other Asbury Foundation programs during her quarter century at Bethany Village, leaving an enduring mark on the community.

In 2021, Phyllis took steps to assure that her impact will continue for decades to come by creating the “Phyllis V. Schweizer Capital Endowment Fund,” which will benefit MapleWood Assisted Living

and The Oaks Skilled Nursing. Her gift will support interior and structural upgrades at both locations when Phyllis passes away.

“I believe giving is an important part of life,” says Phyllis, who designated MapleWood and The Oaks because of her volunteer experiences there and seeing the quality care and engaged living friends received. She saw first-hand how staff at MapleWood and The Oaks provide necessary services for residents in a dignified and engaging way.

“Living there brings contentment and support for residents,” says Phyllis. “People can socialize, get three good meals a day, and take part in all kinds of programs.”

# INVESTING IN OUR FUTURE

Donors' gifts to an Endowment Fund can be directed to a current fund, such as the Benevolent Care Endowment Fund, or to establish a donor-designated endowed fund assuring that your legacy and passions will be carried forward for generations to come.

Three donor-designated endowment funds matured in 2022. They are:

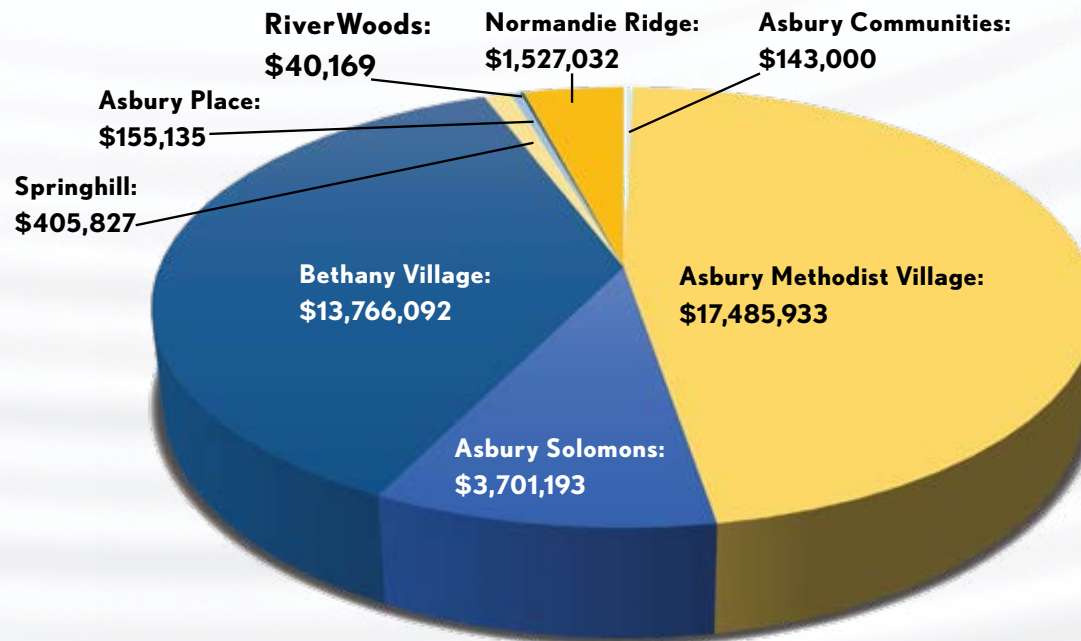
- » **Asbury Intergenerational Endowment Fund established by Liz Van Billiard**  
2022 Value = \$1,113,538.11 | 2022 Income = \$22,270.76
- » **Cynthia Mordaunt Rosborough Endowment Fund**  
2022 Value = \$180,063.07 | 2022 Income = \$3,601.26
- » **Daniel K. Fortney Admission Assistance Endowment Fund**  
2022 Value = \$318,763.03 | 2022 Income = \$6,375.26

Named Donor-Designated Endowments - not yet funded:

- » **Asbury Solomons James and Judith Jones Endowment Fund**
- » **Bethany Village Phyllis V. Schweizer Capital Endowment Fund**
- » **Normandie Ridge John Petrick Jr. and Elizabeth R. Petrick Enhancement and Environment Fund**

## Total Donor-Designated and Benevolent Care Endowments\*

\*Approximate as of 12/31/22





## Leaving a Lasting Legacy Through Your Will

Be it benevolent care, capital projects or a personal passion, establishing a bequest in your will or trust ensures that the programs that inspired you will continue into the future. This type of gift also allows donors to retain control of their assets during their lifetime and decrease estate taxes. Gifts may be a specific dollar amount, a percentage of an estate, or the remainder after all other provisions are specified, and stay in the Asbury community chosen by the donor.

For second-generation Bethany Village resident Lenor Hersey, it was important to establish a bequest to benevolent care, a program that provided dignity and support to her mother when she lived there. “Benevolent care was an invaluable comfort to me, and my family,” says Lenor. “More than anything, this program represents the incredible support and love that this community shows to each other.”

### Benevolent Care Provided in 2022\*

Asbury Methodist Village	\$1,544,304
Asbury Place Kingsport	\$30,543
Asbury Place Maryville	\$24,291
Asbury Solomons	\$259,028
Bethany Village	\$246,017
Normandie Ridge	\$335,714
RiverWoods	\$151,262
Springhill	\$132,277
Total Provided:	\$2,723,436

\* through third quarter of 2022

## MEET THE ASBURY FOUNDATION TEAM

J.D. Shuman | President & CEO

Susan Mayernick | Executive Vice President

### Community Development Team

- » Fran Ashby, Vice President of Donor Relations & Philanthropy
- » Susan Avitan, Senior Director of Development, Asbury Methodist Village
- » Robert Brown, Director of Development & Estate Planning, Asbury Methodist Village
- » Stephanie Hubbard, Director of Development, Asbury Methodist Village
- » Jacob Kanagy, Director of Development, Bethany Village
- » Denise Kolivoski, Director of Development, Springhill
- » Heather Mattingly, Director of Development, Asbury Solomons

### Operations Team

- » Alicia Driscoll, Executive Assistant, Stewardship & Operations Specialist
- » Ann Marie Fagnano, Administrative Assistant
- » Patty Folgar, Associate Director of Development
- » Robert Walsh, Director of Development Operations
- » Heather Weiss, Donor Operations Assistant

# VALUE PROPOSITION

## Aligning donor passion with transformational opportunity

Asbury Foundation is a 501(c)(3) organization that secures philanthropic support to enhance the quality of life for seniors served by Asbury Communities, Inc.

- » Albright LIFE Centers, Chester, Lancaster, Lebanon, Lycoming counties, PA
- » Asbury Methodist Village, Gaithersburg, MD
- » Asbury Place Kingsport, Kingsport, TN
- » Asbury Place Maryville, Maryville, TN
- » Asbury Solomons, Solomons, MD
- » Bethany Village, Mechanicsburg, PA
- » Normandie Ridge, York, PA
- » RiverWoods, Lewisburg, PA
- » Springhill, Erie, PA



5285 Westview Dr #200 | Frederick, MD 21703  
(301) 216-4050 | [TheAsburyFoundation.org](http://TheAsburyFoundation.org)

Platinum  
Transparency  
**2022**

**Candid.**