

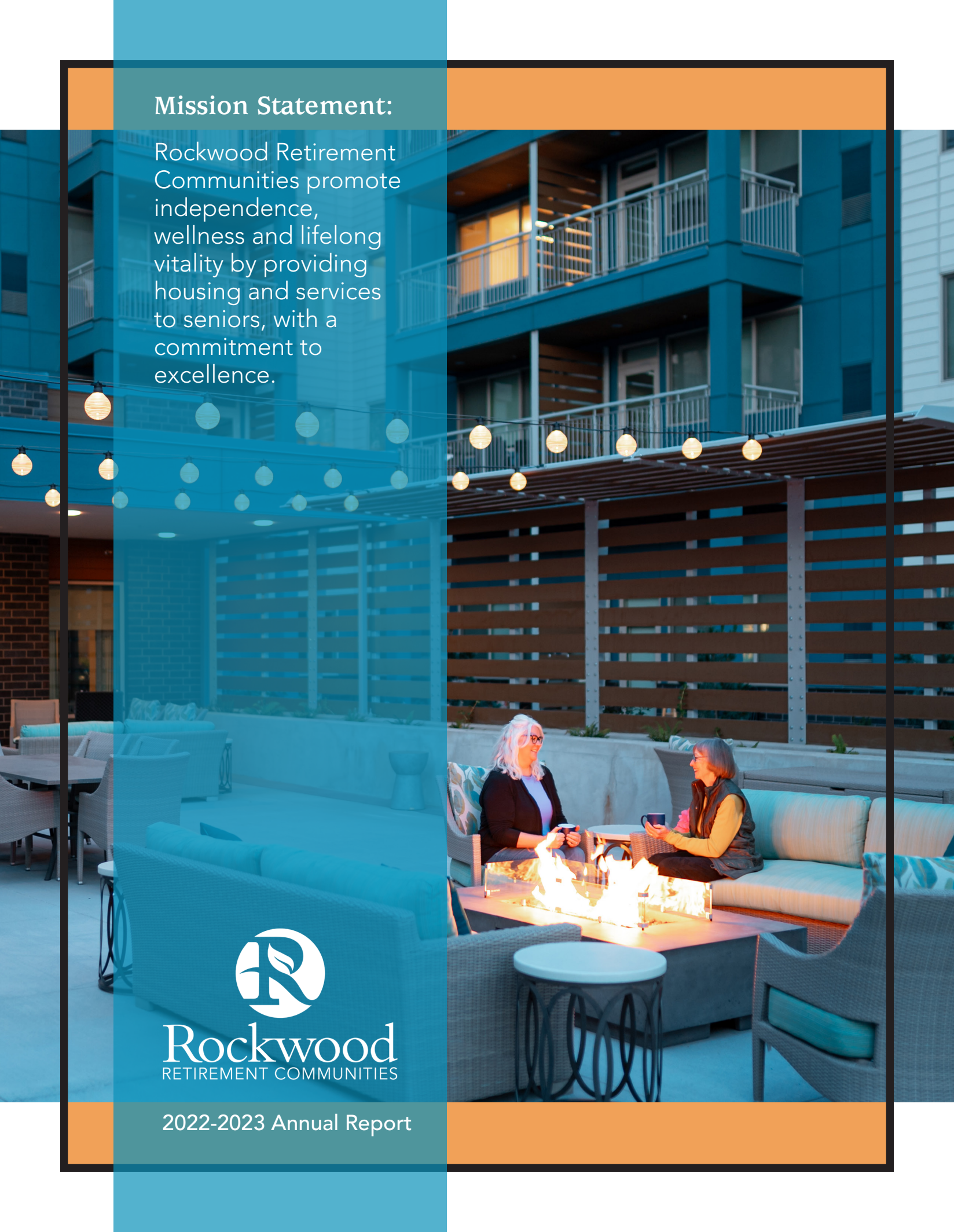
Mission Statement:

Rockwood Retirement Communities promote independence, wellness and lifelong vitality by providing housing and services to seniors, with a commitment to excellence.



Rockwood
RETIREMENT COMMUNITIES

2022-2023 Annual Report



Leading Us Forward



Executive Leadership Team *(left to right)*

Andrew Gorton, General Manager, Rockwood South Hill
Jason Druffel, Director of Human Resources
Dan DeBoise, Executive Director of Health & Wellness Services
Jim Maxwell, President and CEO
Marianne McCormack, Director of Development
Eowyn Sallis, Vice President of Sales and Marketing
Charles Wells, Vice President of Finance and CFO
Stephen Collette, General Manager, Rockwood at Whitworth



Board of Trustees

Andy DeMott - Chair
Tom Johnson - Vice Chair

front John Barber
Rev. Sheila Miranda
Catherine Kardong
Jonell Block
David Wetmore
Robyn Parks
Patty Conaty

back Tom Johnson
Jim Droppers
Chris Bafus
Brent Stanyer
Andy DeMott
Demitri Itskos
(not pictured)
Beth Bornhoft &
Rick Thomas



Major Milestones

*Jim Maxwell, President and CEO
Andy DeMott, SUMH Board Chair*

We have had a very exciting and eventful year with many major milestones, accomplishments, and new beginnings!

In April, Rockwood celebrated the opening of Rockwood at Whitworth's Northland building, a 117-unit independent living addition. Sales have been very successful with occupancy already over 83%, and we have welcomed over 140 new residents to their new homes. The opening marked the culmination of a 4-year redevelopment including the building and opening of the healthcare building, Palvella Glen, during the pandemic.

It is exciting to see the energy of new activities happening at the Rockwood at Whitworth campus along with our growing relationship with Whitworth University. We look forward to the ongoing benefits to both of our organizations.

With the growth and expansion of the Northland, Human Resources successfully hired and welcomed over 44 new employees in the past year. Rockwood continues to capitalize on opportunities for employee development and advancement, while navigating ongoing regulation changes which included the 2023 mandated minimum wage increase of 8.63% and additional labor market pressures. We continue to celebrate our team members and value their dedicated service to our residents.

In July, Rockwood celebrated 33 years of leadership with the retirement of CEO Alan Curryer. Alan joined Rockwood in November 1990 as CFO and served as CEO since 2003. Alan can be very proud of the incredible legacy he led for over half of Rockwood's history.

The Board performed a national search for a replacement and Jim Maxwell, who has been Rockwood's CFO, rose above the rest and was promoted to CEO. Jim has been actively involved in the success of Rockwood for the past 19 years and looks forward to leading Rockwood into the future.

Rockwood Residents' Foundation continues to provide positive impacts to Rockwood's residents and team members. The Foundation celebrated the dedication of the Legacy Terrace on the Rockwood at Whitworth campus, had a successful auction, provided scholarship support to team members and their children, and rebranded its planned giving program to "The Rockwood Legacy Circle."

Rockwood continues to benefit from ongoing strategic and master planning, and financial strength. We hope you enjoy learning about this year's highlights, including our new Physician Clinic at Rockwood South Hill. Rockwood strives to continue to offer what many current and future residents desire and to stay innovative and healthy into the future.

A Grand Opening

Eowyn Sallis, Vice President of Sales and Marketing

On July 13, 2023, we celebrated the Grand Opening of Rockwood at Whitworth. It was a day to celebrate the complete revitalization of our northside community. For over 4 years, the residents and staff have watched the transformation unfold.



This year brought a huge milestone for Rockwood Retirement Communities with the completion of redevelopment of the Rockwood Hawthorne community – now transformed into Rockwood at Whitworth. With over 6 years of planning and construction, the redevelopment happened in two phases, with the first building, Palvella Glen, opening in February of 2021. This enabled Rockwood to move residents of Rockwood Hawthorne into brand-new apartments in assisted living and memory care.

In May of 2021, we started the construction of the Northland Independent Living building. The Northland consists of 239,000 square feet of overall space and includes 117 independent living apartments ranging in size from 850–1,990 square feet. The Northland took almost exactly 2 years to build, and we began welcoming new residents in April of 2023. Six months after opening the Northland, the community had already welcomed over 140 new residents and hired 69 new employees.

With the redevelopment of Rockwood at Whitworth complete, the lifestyle of being a Rockwood resident is in full swing. In addition to all of the wonderful amenities and services, Rockwood’s unique partnership with Whitworth University brings the vibrancy of lifelong learning to the campus. Some of the highlights of the developing partnership have included resident access to athletic events, improv performances by students, Q & A sessions with Whitworth University’s President each term, access to Whitworth University courses, use of the aquatic center, and much more.

Through our partnership, Whitworth University students are benefiting as well with a “Community Mentors” program. A resident is paired with a student for the duration of the student’s program. Residents can participate as clinical subjects with whom the students can engage and practice, giving them great hands-on experience. The opportunities within our university partnership are endless and will continue to evolve as time progresses.

The completed community includes:

- 48 Assisted Living Apartments with 2 Dining Areas
- 24 Memory Care Studios with Outdoor Courtyard
- 117 Independent Living Apartments with Balconies/Patios
- 22 Courtyard Multiplex Homes

**in progress for 2024 completion*

- | | | |
|--|---|--|
| <ul style="list-style-type: none">• 3 Dining Venues• Event Center• Underground Parking and Storage• Exercise and Fitness Facilities | <ul style="list-style-type: none">• Outdoor Courtyard and Fountain• Theater• Community Room/Art Studio• Bocce Ball Court• Library | <ul style="list-style-type: none">• Viva Salon and Spa• Community Garden*• Pickleball Court*• Dog Park*• Woodshop* |
|--|---|--|

We take pride in supporting our team members who strive to serve our residents and the organization as agents of change and quality service. We'd like to recognize the following people for their accomplishments.

The Rockwood at Whitworth Sales Team was awarded the National Construction Sales Team of the Year at the Greystone Sales Adventure 2023 in Dallas in late February. In addition, Monica Waitt was awarded Healthcare Services Counselor of the Year. The Rockwood at Whitworth Sales Team held depositors for 4 years and 1 month due to starting pre-sales early to achieve financing for the health care redevelopment. The team achieved 95% presold and replaced 63 cancellations through this timeframe and continued to hold depositors before occupancy was available due to ongoing construction delays. Monica is responsible for maintaining occupancy for 72 assisted living and memory support apartments. When Monica started at Palvella Glen, occupancy was around 80% with a goal to reach stabilization. Within months Monica reached that goal and in 2023, month after month, Monica managed to maintain over 96% occupancy.

Annually, LeadingAge WA member organizations are asked to nominate individuals, programs and/or groups who meet varying criteria for the Awards of Excellence. We are so proud of the dedication, care and innovation that these team members, residents and/or their programs have given to the enrichment of the lives of residents and team members at Rockwood Retirement Communities.

Leslie Malloy, RSH Wellness Director, has found innovative and challenging ways for residents of all abilities to get out and get moving! Taking residents on adventures like snowshoeing, river rafting, rock climbing, and parasailing, Leslie has embraced ways for residents to challenge themselves and have fun taking part in our fitness program. Congratulations on receiving the Leading-Edge Care and Services Award.

Marianne McCormack, Director of Development, and Judi Young, Rockwood Residents' Foundation Chair, have done an amazing job of educating and engaging residents and team members in the many ways that the Foundation provides support to Rockwood during the pandemic and post-pandemic. Congratulations on receiving the Excellence in Leadership Award.

Autumn Sumner, RSH NAC, has been with Rockwood for 19 years and has exemplified the quality care and faithful service Rockwood strives to provide. With her friendly smile you can tell that she loves her job and she treats the residents like her family, because to her they are family. Autumn provides excellent training and guidance for students with Sparrow Healthcare during their 3 weeks of job shadowing. Congratulations on receiving the Excellence in Caregiving Award.

In addition, Alan Curryer, former President and CEO, received Leader Emeritus status, and Jim Maxwell, our current President and CEO, serves on LeadingAge WA Board of Directors, Class of 2024.



1. Leslie Malloy, RSH Director of Wellness --
LeadingAge WA 2023 LeadingEdge Award
2. Marianne McCormack, Director of Development --
LeadingAge WA 2023 Leadership Award
3. Autumn Sumner, RSH NAC --
LeadingAge WA 2023 Caregiving Award
4. Monica Waitt, RW Sales Counselor --
Greystone Sales Adventure 2023 Health Services
Sales Counselor of the Year Award
5. Holly McLeod, RW Sales Manager, and Eowyn
Sallis, V.P. of Sales & Marketing --
Greystone Sales Adventure 2023 Construction
Sales Team of the Year Award
6. Alan Curryer, former RRC President --
LeadingAge WA 2023 Leader Emeritus Award

Spokane United Methodist Homes Summarized Consolidated Balance Sheet Information

	<u>2023</u>	<u>2022</u>	<u>2021</u>
Cash and Investments	\$ 30,747,682	\$ 22,943,597	\$ 20,829,864
Property, Plant and Equipment	201,380,186	176,114,571	144,205,882
Other Assets	51,638,469	75,698,358	113,154,835
Total Assets	\$283,766,337	\$274,756,526	\$278,190,581
Current Liabilities	\$ 26,258,360	\$ 20,284,563	\$ 16,199,402
Long-term Debt and Other Liabilities	179,904,957	194,987,952	198,721,930
Deferred Revenue	120,375,727	92,166,840	87,611,103
Fair Value of Interest Rate Swap	1,389,464	0	0
Net Assets (Deficits)	(44,162,171)	(32,682,829)	(24,341,854)
Total Liabilities and Net Assets	\$283,766,337	\$274,756,526	\$278,190,581

Summarized Consolidated Operating Statement Information

	<u>2023</u>	<u>2022</u>	<u>2021</u>
Fees for Services	\$ 30,783,629	\$ 26,795,895	\$ 24,609,073
Amortization of Entry Fees	4,544,439	4,111,369	3,377,761
Investment Income (Loss)	(484,274)	(2,127,995)	4,950,973
Other	1,506,849	1,486,345	1,763,684
Total Revenues	\$ 36,350,643	\$ 30,265,614	\$ 34,701,491
Operating Expenses	\$ 30,321,853	\$ 27,709,533	\$ 24,952,857
Depreciation	6,864,117	6,802,915	5,918,064
Interest	7,353,624	7,547,057	5,659,737
Total Expenses	\$ 44,539,594	\$ 42,059,505	\$ 36,530,658
Operating Loss	(8,188,951)	(11,793,891)	(1,829,167)
Loss on property disposal, change in fair value of interest rates swap, loss on debt extinguishment, gain on PPP loan and pension-related changes other than net periodic pension cost.	(4,059,795)	2,996,174	2,469,800
Change in Unrestricted Net Assets	(\$12,248,746)	(\$ 8,797,717)	\$ 640,633

Spokane United Methodist Homes' financial statements are audited by Dings, Zarecor & Associates, PLLC. Copies of their audit opinion and of the complete audited financial statements are available upon request.

Financial Summary

as of May 31, 2023

REVENUES

Healthcare Services	19,098,349	53%
Independent Living Service Fees	11,685,280	32%
Life Tenancy Revenue	4,544,439	13%
Other	837,205	3%
Contributions	185,370	0%

Total: \$36,350,643

EXPENSES

Health and Wellness Services	11,103,823	25%
Interest	7,353,624	17%
Depreciation	6,864,117	15%
Plant and Operating Maintenance	5,236,889	12%
Food Service	4,965,196	11%
General and Administrative	3,724,300	8%
Housekeeping and Laundry	1,984,476	4%
Marketing and Fundraising	1,582,867	4%
Insurance and Taxes	820,451	2%
Activities	768,871	2%
Other	134,980	0%

Total: \$44,539,594

HOUSING & OCCUPANCY

	Rockwood South Hill		Rockwood at Whitworth		Appleway Court	
	Residences	Residents	Residences	Residents	Residences	Residents
Homes/Duplexes	166	223	22	25		
IL Apartments	140	168	117	75	62	61
AL Apartments	46	50	48	53		
Memory Support	30	30	24	22		
Skilled Nursing	45	34				
Total:	427	505	211	175	62	61

Circle of Support

Judi Young, Rockwood Residents' Foundation Chair
Marianne McCormack, Director of Development



As I look back on the almost three years serving as the Chair of your Rockwood Residents' Foundation's Board, I continue to be in awe of all that you have done to support your Foundation. Whether you are a resident, a team member, a corporation or vendor, or just a friend of Rockwood, you have helped your Foundation do such incredible and meaningful things.

Your Foundation is a circle of amazing people working together to create a culture of kindness and compassion in support of Rockwood, its mission, and ultimately those of us who live and work here. It is this circle of support that serves as a cornerstone for our thriving community that we call home. We are so grateful for the dedication and expertise of the volunteers on the Foundation Board, the Investment Advisory Committee, the Advisory Committees at both campuses, the Partners in Philanthropy Committee, the Corner Store, the auction committee, the scholarship committee, the talented artists who donate the proceeds from their sales to the Foundation, and many more who help keep this circle thriving, successful and continuing to grow.



Let's celebrate some of the many things your Foundation did this year, starting with the first auction in more than a decade, a fun event. Generous donors made the annual fundraisers Holiday Lights (RSH) and Stars In Our Lives (RW) the most successful ever. The Corner Store added approximately \$100,000 to the Residents' Assistance Immediate Need Fund. We celebrated the opening of the

Legacy Terrace (RW), a lovely gathering spot with its gentle water feature and displays of personalized engraved bricks donated by Foundation supporters. The Foundation produced its first informative video, which can be seen on the Rockwood website.

One of the most exciting changes this year is the new look and name for your Foundation's planned giving program. Formerly known as the O.W. Young Legacy Society or "OWYLS", your new planned giving program is called the Rockwood Legacy Circle. The Legacy Circle represents the circle of caring that encompasses the compassion, support, life and friends who have made a gift to our Foundation, that will live on for years to come.

This January, Patty Conaty will become the new Chair of the Foundation Board of Trustees, leading the Foundation into a stronger and even more exciting future. Being Board Chair has been one of the most fulfilling and positive experiences of my life. One thing that I will truly miss is the multiple daily conversations with our amazing Director of Development, Marianne McCormack. Rockwood is so blessed to have Marianne leading the Foundation. She is without a doubt the true heart of the Foundation!

Thank you for your generous support of your Foundation. You truly do make a positive difference.

Here's How Your Foundation Support Made A Difference in FY2023:



- Welcomed new residents to Rockwood at Whitworth (RW)
- RW raised the most money ever in one fiscal year! (\$119,153)
- Received the LeadingAge Washington Award for Excellence in Leadership
- Rebranded the O.W. Young Legacy Society ("OWYLS") to the Rockwood Legacy Circle
- Created an Employee Food Pantry at RW with continued monthly funding
- Provide monthly funding to the Employee Food Pantry at RSH
- Hosted the first ever Food Truck Rally at RSH
- Celebrated the Legacy Terrace Grand Opening at RW
- Provided the monies necessary to create a Physician Clinic on the RSH campus
- Purchased new yoga mats and blocks at RSH
- Purchased new exercise equipment for Fitness Classes at RW
- Provided funding for Comfort Carts at RSH
- Purchased a frozen yogurt machine (RSH)
- Added a new position to the Foundation Team (Development Assistant)
- Created and approved a new Strategic Plan for 2024-2026
- Hosted a Father's Day BBQ for Healthcare residents and their families
- Hosted a Meet and Greet with Rockwood's Executive Leadership Team (*both campuses*)
- Awarded \$6,000 in scholarships to children of employees (*both campuses*)
- Awarded \$8,000 in scholarships to team members (*both campuses*)
- Awarded \$19,700 in Employee Financial Assistance (*both campuses*)
- Provided \$22,000 in Residents' Assistance for RW
- Provided \$270,000 in Residents' Assistance at RSH
- Provided \$61,000 in support for Wellness and Exercise RSH

Major fundraising successes in FY2023 included:

- RSH 2022 Holiday Lights: \$228,000
- RSH Physician Clinic Fundraiser: \$90,000
- Auction at RSH: \$36,000
- RW 2023 Stars In Our Lives: \$22,000
- Annual Fundraising Luncheon: \$13,500
- Michelle, Cuin, and Leslie's baked goods: \$4,000
- RSH two Car Washes: \$4,000
- RSH Holiday Market: \$3,000 (Thank you, Joanne Brickell, Sally Ensor, Marion Park, Tanya Rice, Connie Stacey, and Charlotte Yocom)

Spring Forward Auction

Your Rockwood Residents' Foundation held its first auction in over a decade. Fun was had by all and we raised \$36,000 (*photo was taken before all donations were received*) for your Foundation! We would like to thank everyone who contributed in-kind donation items.



Individual Donors:

Tom Bishop
Brad Blegen
Barb Bonino
Kim Cederholm
Ned & Stephanie Clayton
Patty Conaty
Sam & Colleen Crossett
Leona Dater
Jim & Ruth Dillon
Jason & Rachel Druffel
Marianne McCormack
& Kevin Dudley
Dianne Fields
Andy Gorton
Judy Grollmus
Judy Hamel
Marion Hammer
Molly Hannan
Darryl & Carol Isotalo
Walt Jakubowski
Ann Lackman
Debbie Long
Roz Luther
Colleen Mahoney
Judy Matsumoto
Correen Morrill
Frem & Marta Nielsen
Bob* & Diane Notske
Jim & Marion Park
Scott Patnode
Margaret Patterson
Carla Peperzak
Christy Pospahala*
Joanne Quinsey
Katherine Bruya Reed
Charlie Reed
Liz Regan
Tanya Rice

John & Mary Richards
Marnie Rohrholm
Kay Rowley
Jody Sahlin
Janet Sahlin
Craig Sanders
Jim Slavin
Claudia Smith
Edy Thogersen
Harriet Van Wyck
Lynn Volwiler
Lynn Watts
Pat & Carol West
Charlotte Yocom
Judi Young
MaryAlice Stoner
The Rockwood Elves
Kent & Monica Wales

Business Donors:

Alaska Airlines
Anthony's Restaurant
Avista Utilities
B Side Games
Black Rock Marina & Resort
Coeur d' Alene Casino Resort
Coaching Freedom – Monica Wales
Cravens Coffee
Dermatology Specialists of Spokane
Dingus, Zarecor & Associates
DoubleTree by Hilton
Dr. Lissa Johnson, DDS
Eastern Washington University
Fiesta Mexicana
Four E Farms
Gaffaney Electric
Great Harvest Bread Co.
Happy Laundry – Kent Wales

Infinite Healing
Iron Goat Brewery
Jewelry Design Center
KREM 2 Television
Miller Paint
Nothing Bundt Cakes
Odom Corporation
Papa Murphy's Pizza
Parker Toyota
Proforma
Rosauers Supermarkets
Seafair (City of Seattle)
Seattle Seahawks
South Hill Comprehensive
Dentistry, Dr. Vargas
Spokane Chiefs
Spokane Club
Spokane Comedy Club
Spokane Indians
Spokane Valley Summer Theatre
The Chalet Restaurant
Trader Joe's
Triple Play Family Fun Park
Two Seven Public House
University of Idaho
University of Washington
Vehrs Distributing
Venus Nails
Viva Salon and Spa
Washington State University
West Coast Entertainment

*Deceased



The Rockwood Legacy Circle

Visionaries who came before us left a legacy to all of us who are now a part of the Rockwood family. We refer to them as “Visionaries” because they left a legacy that transcends them as they envisioned their contribution for the ongoing growth and transformation of their community. Through the Rockwood Residents’ Foundation’s planned giving program, you can leave your legacy by way of a financial gift that will help ensure that the Foundation will be secure and will continue to succeed even after you’ve passed. As we move into the later years of our lives, we channel our energy, our dreams, and our hopes toward helping those we leave behind to have as wonderful a life as we’ve had. We become Visionaries!

To become part of the Rockwood Legacy Circle, all you have to do is inform the Director of Development, Marianne, that you have made a provision for the Rockwood Residents’ Foundation in your estate planning. Residents who have included the Rockwood Residents’ Foundation in their estate plans through their wills, bequests, charitable trusts, life insurance policies, beneficiary designations, refundable contracts or other life estate plans are listed below (as of November 12, 2023).

(New Legacy Circle Members highlighted in red). If we have inadvertently left your name off the list, please reach out to Director of Development, Marianne McCormack, at 509 536-6677.

Anonymous
Nancy Aston
Bob* & Elaine* Bariletti
Barb Bonino
John* & Frances Brewer
Jim* & Jana Carey
Kim & Bob Cederholm
Ned & Stephanie Clayton
Jim* & Patty Conaty
Laurie Connolly
Drs. Art* & Joan Craig
Alan & Missy Curryer
Dan & Elsa Distelhorst
Dave & Sara Ensor
Anne & Bernie* Fox
Anne Franke & Michael West*
Harry Fuhs
Dick & Judy Gammon
Judy Grollmus

Ted & Diane Gunning
Victor Gruol & Jill Bennett
Mark & Marion Hammer
Bill & Donna Harsell
Jim Hiller
Jim* & Judy Hughes
Hal Hunt & Claudia Smith
Walt & Shirley* Jakubowski
Myrtle Kaul
Don* & Diane Kelly
Sally Kleaveland
Debbie & Will Long
Spike & Molly* Lynch
Todd Maddock
Shirley Marpe
Jim & Amy Maxwell
**Marianne McCormack &
Kevin Dudley
Bob McDonald**

Mary Lew Miller
Correen Morrill
Jim* & Sue Morris
Tom & Mary Mosher
Ronald “Jerry” White &
Linda Moulder
Frem & Marta Nielsen
Bob* & Diane Notske
John & Diane Packard
Margaret Patterson
**Carla Peperzak
Charles Peterson**
Bill & Vern Prouty
Ann Quinn & David Cooling
Fred Radebaugh
Carolyn Reed
Mike & Tanya Rice
Dave & Millie Roberts
Gene & Bonnie Roth

Brooks C. Sackett
Eowyn Sallis
Mary Beth Shinn
Joanne Slavin
Gil & Christi Smith
Connie Stacey
Sam* & Harriet Van Wyck
Wally* & Lynn Volwiler
Monica & Kent Wales
Brusan Wells
Don & Judi Young

*Deceased



Annual Donors

June 1, 2022 – May 31, 2023

The Rockwood Residents' Foundation is greatly appreciative of gifts of all amounts. Due to space restrictions, donations under \$500 are not listed.

Donations of \$50,000

Walker Construction
Ric* & Kay Odegard

Donations of \$25,000--\$49,999

The Estate of Rod & Carole Walker
The Estate of Anita Morphy Becker
Jim* & Jana Carey
Hal Hunt & Claudia Smith

Donations of \$10,000--\$24,999

Bob* & Diane Notske
Greystone, Inc.
Anonymous
Eric & Terry Sorensen
Del* & Eva Lusk
John & Diane Packard
Douglas H.* & MaryAlice Stoner
The Estate of AnnMarie King

Donations of \$5,000--\$9,999

Dave & Sara Ensor
Nadine Miller
Mari & Dave Clack
Fran Brewer
Anonymous
Harry Fuhs
Ned & Stephanie Clayton
Inge Hendron
Tom & Nancy Mahony
Harriet Van Wyck
Don & Judi Young
Walt & Shirley* Jakubowski
Dave Dierdorff & Madeleine Lefebvre
Richard* & Sally Kleveland
Wally* & Lynn Volwiler
Bob* & Elaine* Bariletti
Rea Walker
Rick & Karen Meyers

Donations of \$1,000--\$4,999

Jody Sahlin
J. Scott Patnode
Phebe Thompson
Gil & Christi Smith
Kay Rowley
Doris Sutherland
Parker Field
Georgene Patten
Correen Morrill
Wayne Attwood*
Debbie & Will Long

Jim & Marion Park
Mike & Tanya Rice
Sandy* & Dotty Greer
Leona Dater
Ruth Elkins
Pete* & Pam Glass
Bob Koppe
Leroy & Sallie Clemons
Dr. Samuel Selinger
Bill & Vern Prouty
Judy Grollmus
Dick* & Connie Stacey
Peter & Diane Joss
Jim & Amy Maxwell
Judy Brooks
Hillis, Clark, Martin & Peterson
The Louis & Margery Livingston Fund
Bill & Donna Harsell
Judy Hamel
Mary Heath
Tom & Laurie Connolly
Jim* & Patty Conaty
Julie Wells*
Keith & Leanna Schafer
Ken & Lee Swedberg
Michelle Duke, Cuin Hansen,
& Leslie Malloy
Diane Kelly
Kip & Alice McKeever
Stan Fergin
Monica & Kent Wales
Jim* & Judy Hughes
Pat Kelley
Fred & Muriel* Radebaugh
Jack Nyman
Hazel Vogel
Todd Maddock
Margaret Patterson
Carla Peperzak
Bob & Jean* Panther
Alan & Missy Curryer
Elaine Zant
Camilla Mounts
TJ & Sue Summerson
Anonymous
Pat* & Diane Sullivan
Marianne McCormack & Kevin Dudley
Dorene Decker
Colleen Mahoney*
Kaye Young
Jim & Sue Malm
Lee & Doni Walker
Don & Marion* Oakley

Mark & Suzanne Ostersmith
Barb Bonino
Sue Morris
Andy & Debbie Gorton
Rick & Maureen Boutz
Frank* & Gayle Faha
Pat & Carol West
Joan Degerstrom
Anonymous
Jennell & Louise Branson
Bern Sheldon
Byron Ophus
Charles Crickman
Cynthia Thiel
Donna Schweiger
Ed Huneke
Kurt & Gayle Orton
Larry & Lois Hayden
Michael* & Betty Leinweber
Mike & Linda Jones
NAC Architecture
Penny Brown
Ray & Christie Miller
RDG Planning & Design
Rick & Diane Thomason
Vern & Marilee Griffith

Donations of \$500--\$999

Andy & Diane DeMott
Larry & Donna Roberts
Mike & Joan Dragnich
Dan Schaffer & Mary Lou Johnson
George & Doris Dyer
Martin* & June Peterson
Kathy Myers
Brad Blegen
Jim & Lynn Watts
Jason & Rachel Druffel
Mary Beth Shinn
Jim Calderhead*
Robert Baird
Tom & Lori Bishop
Suzy Grainger
Michael & Laurel Nissley
Chuck & Paddy Shannon
Oscar* & Lois Thomason
Dick & Judy Gammon
Eugene & Bonnie Roth
Pat Branz
Bob* & Sandy Compton
Bob Cavill
Bill Lutz
Deane & Susan Arganbright

*Deceased. If we have inadvertently left your name off a list, please contact the Director of Development.

Sid Barth
Peter* & Charlotte Yocom
Eowyn Sallis
Jerry* & Marilyn Stocker
Helen Donigan
Jim & Dodie* Gerding
Paul Wapato
Martin & Margie* Phillips
Susan Nunes
Bill* & Linda Greene
Vernice Hunnicutt
Nancy Aston
Anne Franke & Michael West*
Margaret Clark
Peg Leslie
John & Kathy Ludders
John & Mary Richards
Sue Iwata
Ann Quinn & David Cooling
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Charles* & Anna* Yentzer
Charles* & Mary Lou Karr
Claudia Biggs
Dennis & Dianne McMinn
Dorothea Marshall
Ed Larson
James & Carolyn Cooper
Sellers Masonry
Ken & Marilyn Hallet
Laurence & Dian Wiwatowski
Lois Neswick*
Louise Klouda
Mark & Mary Ann Lester
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Michael Noyes
Michael O'Malley
Phil & Ruth Isaak
Phil & Leah Kimball
Piersol Construction
Robyn Parks
Sandra Walker
Shirley Marpe
Spike & Molly* Lynch
Stephen & Courtney Collette
Dwayne & Valynn Putzke



Cumulative Lifetime Donors

through May 31, 2023



Angels

Lifetime giving in excess of \$1,000,000

Anonymous

Visionaries

Lifetime giving \$500,000 & \$999,999

Will* & Foxy* Lorenz

Developers

Lifetime giving \$250,000 & \$499,999

Estate of Catherine Bernhard

Estate of Merle LePouce

Estate of Earl & Juanita Peterson

Sustainers

Lifetime giving \$100,000 & \$249,999

Glenmar Childers*

Eugene* & Romaine* Clouse

Estate of Neal & Helen Fosseen

Vern Gates*

Larry & Lois Hayden

George* & Helen* Ingraham

Estate of Louis & Margery Livingston

John* & Janet* Peterson

Ausey H.* & Betty* Robnett

Estate of Jim Schafer

Wally* & Lynn Volwiler

Dr. Elizabeth Welty*

Estate of Margaret S. Williams

Sponsors

Lifetime giving \$50,000 & \$99,999

Fred Alderson*

Bob* & Elaine* Bariletti

Avis Brown*

James & Wanda* Cowles

Robert Downing*

Leo* & Catherine* Drewiecke

Mary Flowers*

Gus* & Betty* Gustafson

Hal Hunt & Claudia Smith

Ric* & Kay Odegard

Jim* & Sue Morris

Dick* & Christy* Pospahala

Lois Sampson*

Everett* & Bernadette* Sandburg

Shirley Shaw*

Rod* & Carole* Walker

Walker Construction

Sam* & Harriet Van Wyck

The Estate of Alvin & Jane Wolff

Charles Wooley*

Bruce* & Nancy Wright

Guardians

Lifetime giving \$25,000 & \$49,999

Anonymous

Anonymous

Wayne Attwood*

Grayce Bartlett*

The Estate of Mary Beck

Ernest* & Anita* Becker

Mignonette Bond*

Dorothy M. Brown*

Clinton* & Elizabeth* Corliss

Jim* & Jana Carey

Clara Davis*

Dave & Sara Ensor

Frank* & Gayle Faha

Stan & Jody Fergin

Kay Freehill

Harry Fuhs

Anna Mae Graham

Greystone

Miriam Hatch*

Harry* & Inge Hendron

Elizabeth "BJ" Hulteng*

Hugh* & Mary* Johnston

Alice Kennedy*

Chuck* & Peg Leslie

Correen Morrill

Dorothea Marshall

Ted* & Barbara* Morse

Stan* & June* Olson

The Estate of Merrill O'Brien

John & Diane Packard

Jim & Marion Park

Roy* & Katherine* Snipes

Eric & Terry Sorensen

Eric* & Elizabeth* Tobert

Chuck* & Gwen Yoke

Patrons

Lifetime giving \$10,000 & \$24,999

Anonymous

Lawrence* & Ellen* Anderson

Tom & Lori Bishop

Jane Bowen

Jack* & Fran Brewer

Virginia Brown*

Dr. Bob* & Elizabeth* Burroughs

Dennie* & Judi* Byram

Jim* & Jeanne* Calderhead

Martha Cargill*

Joseph* & Irene* Carter

Mari & Dave Clack

Ned & Stephanie Clayton

Leroy & Sallie Clemons

*Deceased. Names in red indicate those who moved up a level during FY 2023.

Drs. Art* & Joan Craig
Margaret Cunningham*
Alan & Missy Curryer
Dan & Elsa Distelhorst
George & Doris Dyer
Marna Estep*
Parker & Andrea* Field
William* & Harriet* Fix
Peter* & Pam Glass
Dick & Judy Gammon
Dorothy Haenle*
Jean* & Daryl* Hagie
Jack Harvey*
Anna Hearron*
Mary Heath
Mary Hoesly*
Jim* & Judy Hughes
Virginia Hunt*
Kathleen Irwin*
Walt & Shirley* Jakubowski
Millard "Bud" Jones*
Edwin* & Jean Jordan*
Hannah Joss*
Peter & Diane Joss
Ladd Kafflen*
Myrtle Kaul
Ann Marie King*
Dick* & Sally Kleaveland
Arlene Konn*
Norman Krey*
Mark & Mary Ann Lester
Debbie & Will Long
Del* & Eva Lusk
Bill Lutz
Bob* & Diane Notske
Todd Maddock
Tom & Nancy Mahony
Colleen Mahoney*
Bob & Claire* McDonald
Thomas* & Myrene* McFarland
Nadine Miller
Carol Mitchell*
Vona Neiswender*
Jane Newton*
Jack Nyman
J. Scott Patnode
Georgene Patten
Alma Pearson*
Ruth Pearson*
Carla Peperzak
C. Sidney* & Yvonne* Piper
Bill & Vern Prouty
Mike & Tanya Rice
Kay Rowley

Jody Sahlin
Paul* & Dorothy* Schafer
Monte & Vickie Scott
Jean Shields*
Donald* & Lilian* Sperry
Dick* & Connie Stacey
Lorna Stevenson*
Jerry* & Marilyn Stocker
Douglas H.* & MaryAlice Stoner
Ken & Lee Swedberg
Phebe Thompson
Carl* & Helen* Turner
Jerry* & JoAn* White
Don & Judi Young

Members

Lifetime giving \$5,000 & \$9,999

Dave* & Carol Arnold
Nancy Aston
Patricia "Patsy" Bacon*
Gene & Kay Baker
John & Sindy Barber
Barb Bonino
Judy Brooks
Cindy & Jon Chandler
Margaret Clizbe*
George* & Barbara* Cole
Jim* & Patty Conaty
Tom & Laurie Connolly
Mary Jane Corliss
Edgar Craddick*
Al Darling*
Leona Dater
Dave Dierdorff & Madeleine Lefebvre
Rita Doran
Edward* & Virginia* English
Ellen Ferris*
Jim & Dodie* Gerding
Andy & Debbie Gorton
Loren* & Elanor* Gothberg
Sandy* & Dotty Greer
Elsie Graham*
Gordon* & Jeane Gray
Judy Grollmus
Judy Hamel
Bill & Donna Harsell
Virginia Harger*
William* & Elsie* Hester
Stan Hoffman*
Jonathan Holloway*
Ed Huneke
Jean Jalufka
Anne Jensen*
Robert & Elizabeth Joss

Brenda Jurich Luntzel
Bruce Kaufman
Patricia Kelley
Reubin* & Dorothy* Kissler
Bob Koppe
Spike & Molly* Lynch
Jim & Sue Malm
Barbara Manning*
Jim & Amy Maxwell
Patrick* & Darlene* McManus
Ed* & Betty McWilliams
Larry* & Betty* Morse
Camilla Mounts
Rick & Karen Meyers
Ruth Nicolaus*
Robert* & Jan* Owens
Jean Pierre*
Margaret Patterson
Fred & Muriel* Radebaugh
Carolyn Ringo*
Margaret Larson Robnett*
Helen Hazen Rymond*
Wendell* & Jessie* Satre
Bob* & Helen* Shanewise
Bud Shaw*
Gil & Christi Smith
Milt Snyder*
Caroline Sollid*
Phil* & Margretta "Margie" Stanton
Kathryn Stiley*
Carol Stover
Doris Sutherland
Dorie Swanson*
Ruth Thompson*
Monica & Kent Wales
Rea Walker
Paul Wapato
John Warn*
Norman* & Margaret* Wilson
Gerrard E.* & Mary* Wyld
Charlie* & Anna* Yentzer
Peter* & Charlotte Yocom
Kathleen Zuehlke*
Ziegler

Pathways Of Good June 1, 2022 – May 31, 2023

ROCKWOOD SOUTH HILL

Foundation Support Given

Residents' Assistance:	\$270,000
Community Benefit:	171,937
Wellness and Exercise:	92,908
Employee Support:	40,860
Total Support Given to RSH:	\$575,705

Income

Contributions:	\$804,184
Corner Store Revenue:	99,260
Investment Income and Other:	(84,920)
Income Total:	\$818,524

Expenses

Foundation Support Given:	\$575,705
Administration/Other:	132,830
Expense Total:	\$708,535

Fund Balances

Residents' Assistance:	\$5,799,770
Wellness and Exercise:	1,463,714
Deferred Gifts:	772,444
Community Benefit:	397,362
Staff Development:	173,463
Employee Financial Assistance:	151,972
Total Funds:	\$8,758,725

ROCKWOOD AT WHITWORTH

Foundation Support Given

Residents' Assistance:	\$21,997
Community Benefit:	13,232
Employee Support:	5,720
Total Support Given to RW:	\$40,949

Income

Contributions:	158,643
Investment Income:	(5,198)
Income Total	\$153,445

Expenses

Foundation Support Given:	40,949
Administration/Other:	44,043
Expense Total:	\$84,992

Fund Balances

Residents' Assistance:	\$404,712
Employee Financial Assistance:	33,089
Community Benefit:	20,240
Lasa Kaul Staff Development:	21,915
Total Funds:	\$479,956



Rockwood Residents' Foundation's financial statements are audited by Dingus, Zarecor & Associates as part of the consolidated financial statements of Spokane United Methodist Homes. Copies of their audit opinions and the complete audited financial statements are available upon request.

A Vision Come True

*Dan DeBoise, Executive Director
of Health and Wellness Services*



left: Medical Assistant, Crystal Lindblom; right: Dr. Tina Swiggum

Rockwood South Hill has desired to have a Physician Clinic on-site for some time through our strategic plan, and finally that vision has come true in 2023. In July, Dr. Tina Swiggum opened her private practice on the South Hill campus. Patients from outside Rockwood came with her but primarily she is serving Rockwood South Hill residents and team members. Dr. Swiggum has already reached over 600 patients in less than 6 months and is currently not accepting any new outside patients. What a great success!

The Rockwood Residents' Foundation helped to spur a campaign of fundraising to support the costs needed to remodel the space and supply the clinic with equipment. This special fundraising campaign for the clinic raised approximately \$84,000, which surpassed the \$60,000 goal in two weeks! The funds were used to purchase all the necessary equipment to operate the clinic, such as vitals machines, exam tables, and an EKG machine.

Residents and team members have access to a primary care physician on-site and, when needed, the ability for same-day appointments. Dr. Swiggum has enjoyed getting to know those in our community and to provide more attentive personal care. Tina and her medical assistant, Crystal, work part-time and enjoy having this work-life balance. This unique partnership is a win-win for all.



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