

Rockwood Retirement Communities

Annual Report

2023-2024



Solid Leadership



Executive Leadership Team

left to right

*Jason Druffel, Director of Human Resources
 Charles Wells, Vice President of Finance and CFO
 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
 Andrew Gorton, General Manager, Rockwood South Hill
 Stephen Collette, General Manager, Rockwood at Whitworth*



Spokane United Methodist Homes Board of Trustees

left to right

*Carlos de Imus
 Denny Denholm
 Rick Thomas
 Beth Bornhoft
 Jim Droppers*

*Jonell Block
 Catherine Kardong
 Patty Conaty
 David Wetmore
 Chris Bafus*

*Rev. Sheila Miranda
 Tom Johnson - Vice Chair
 John Barber
 Andy DeMott - Chair
 Demitri Itskos (not pictured)*

Rock Solid

Jim Maxwell, President and CEO

Andy DeMott, SUMH Board Chair



How do we measure success? We could ask, as any nonprofit likely should, are we accomplishing our mission currently, are we ensuring we can continue the mission into the future, and are we looking at ways we can expand our mission of “creating caring places that enrich the lives of seniors?”

As we review the past fiscal year in this annual report, you will see a few of the many examples of successful ways we have fulfilled our mission.

Fundamental to our success is Rockwood’s history of strategic and master planning. Through our dedicated, volunteer board, our organization continues to work hard to develop strategic initiatives, monitor progress, and look to the future for our organization.

We have seen meaningful success over our 64-year history exemplified in the past year with our successful redevelopment of the Rockwood at Whitworth campus. We opened and filled our new independent living building (Northland) significantly ahead of projections. This redevelopment furthers our mission as we are now serving over 170 more residents than we were in 2018 prior to the redevelopment of this campus, a wonderful measurement of success.

Rockwood’s success also comes from having a strong, solid organization. We look at our organization as inclusive of residents, team members, associated families and our board. We also value the support provided by our Foundation, associated organizations and vendors that help us continue our mission.

Our residents are engaged in their community and our relationships with Resident Associations at each campus are a valuable part of our culture. Our team members enrich residents’ lives and provide dedicated quality service to our residents and fellow team members each in their roles. At Rockwood, we’re proud of the many success stories that demonstrate our commitment to professional growth and development. Whether advancing to new positions, gaining valuable skills, earning promotions or recognition, our team members are integral to our success and are essential to our mission.

The solid foundation of our organization allows us to better face and weather future challenges. Rockwood Retirement Communities is measurably “Rock” solid as we continue to adapt and strategically plan for the future. Thank you for your partnership and support of our mission.



Solid Growth

Eowyn Sallis
V.P. of Sales & Marketing



This year has been extremely busy and successful for the Sales and Marketing departments at both Rockwood South Hill and Rockwood at Whitworth. We have reached important milestones in large part due to the dedication of our seasoned sales team members and the strength of our brand and mission. The commitment to excellence that each Rockwood team member is trained to provide has helped bring a record number of new inquiries to our amazing communities.

At Rockwood South Hill we achieved a milestone in independent living that has never happened before - 100% occupancy! With 140 individual apartments and 166 homes on the Rockwood South Hill campus, having all of them occupied at the same time is nearly impossible. According to Candace Frasher, Marketing Consultant for over 20 years, "When you take into account the constant movement of residents within our continuum of care, the planning needed for new residents to move in, and the time it takes to remodel an apartment or home for residents, it becomes highly unlikely to be 100% full. We were able to celebrate for about 2 weeks and then movement within the community started again. That being said, we are still hovering at about 98% occupied."

The newly redeveloped Rockwood at Whitworth community is also enjoying great success and major milestones this year. The final phase of this project happened in April 2023 with the completion of The Northland building featuring 117 independent living apartment homes. Since opening, we have been busy welcoming new residents and enjoying becoming one community. The original projections were that the building would achieve stabilized occupancy after approximately two years. The Northland occupancy stabilized within the first year and now every apartment has had an original occupant. The partnership with Whitworth University has also been successful with many residents taking advantage of the ability to take courses, attend sporting events and enjoy lectures. This partnership was the number one reason many incoming residents chose Rockwood at Whitworth, and it has been wonderful to see the intergenerational learning atmosphere come to fruition.

With all of the success of our two life plan communities, the future is bright for Rockwood Retirement Communities. We look forward to finding new ways to serve seniors in the years to come. We are committed to our mission and vision and to honoring our 64-year legacy of providing excellent senior living communities.

Guiding principles for which we aspire to –



Enrich the physical, emotional, social and

spiritual lives



improvement. Foster a climate of honesty, respect and cooperation.





of those we serve. Respect all faiths and embrace diversity. Committed to discovery, innovation and continuous



Provide a positive work environment where team members know they are valued.



Committed to community involvement and outreach.

Spokane United Methodist Homes Summarized Consolidated Balance Sheet Information

	<u>2024</u>	<u>2023</u>	<u>2022</u>
Cash and Investments	\$ 24,451,861	\$ 30,747,682	\$ 22,943,597
Property, Plant and Equipment	201,963,568	201,380,186	176,114,571
Other Assets	42,220,851	51,638,469	75,698,358
Total Assets	\$268,636,280	\$283,766,337	\$274,756,526
Current Liabilities	\$ 9,333,592	\$ 26,258,360	\$ 20,284,563
Long-term Debt and Other Liabilities	156,841,160	179,904,957	194,987,952
Deferred Revenue	140,555,241	120,375,727	92,166,840
Fair Value of Interest Rate Swap	0	1,389,464	0
Net Assets (Deficits)	(38,093,713)	(44,162,171)	(32,682,829)
Total Liabilities and Net Assets	\$268,636,280	\$283,766,337	\$274,756,526

Summarized Consolidated Operating Statement Information

	<u>2024</u>	<u>2023</u>	<u>2022</u>
Fees for Services	\$ 37,670,899	\$ 30,770,408	\$ 26,795,895
Amortization of Entry Fees	4,890,548	4,544,439	4,111,369
Investment Income (Loss)	4,104,330	(484,274)	(2,127,995)
Other	5,577,760	1,520,070	1,486,345
Total Revenues	\$ 52,243,537	\$ 36,350,643	\$ 30,265,614
Operating Expenses	\$ 35,328,124	\$ 30,321,853	\$ 27,709,533
Depreciation	8,512,406	6,864,117	6,802,915
Interest	8,655,964	7,353,624	7,547,057
Total Expenses	\$ 52,496,494	\$ 44,539,594	\$ 42,059,505
Operating Loss	(252,957)	(8,188,951)	(11,793,891)
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.	4,978,391	(4,059,795)	2,996,174
Change in net assets without donor restrictions	4,725,434	(\$12,248,746)	(\$ 8,797,717)

Spokane United Methodist Homes' financial statements are audited by DZA PLLC.

Copies of their audit opinion and of the complete audited financial statements are available upon request.

Financial Summary

as of May 31, 2024

REVENUES

Healthcare Services	\$20,662,514	40%
Independent Living Service Fees	17,008,385	33%
Life Tenancy Revenue	4,890,548	9%
Other	9,236,596	18%
Contributions	445,494	0%

Total: \$52,243,537

EXPENSES

Health and Wellness Services	\$11,963,807	23%
Interest	8,655,964	16%
Depreciation	8,512,406	16%
Plant and Operating Maintenance	6,189,575	12%
Food Service	6,375,529	12%
General and Administrative	4,930,127	9%
Housekeeping and Laundry	2,290,187	4%
Marketing and Fundraising	1,541,465	3%
Insurance and Taxes	946,283	3%
Activities	897,748	2%
Other	193,403	0%

Total: \$52,496,494

HOUSING & OCCUPANCY

	Rockwood South Hill		Rockwood at Whitworth		Appleway Court	
	Residences	Residents	Residences	Residents	Residences	Residents
Homes/Duplexes	166	234	21	26		
IL Apartments	140	165	117	165	62	61
AL Apartments	46	53	48	51		
Memory Support	30	29	24	21		
Skilled Nursing	45	36				
Total:	427	517	210	263	62	61



Rock Stars

Jason Druffel, Director of Human Resources



Bruce Burns, RSH Environmental Services Director; Michael Droppers, RW Environmental Services Manager; Chelle Smith, RN, RW Health Care Services Director; Kristin Youmans, RN, BSN, RSH Infection Preventionist

We are in the people business. We provide housing, care and lifestyle for seniors. The greatest asset in our success is our team members who make it all possible. Hiring and retaining quality and engaged team members is an ever-changing challenge.

Rockwood employs about 450 team members. In 2021 we had around 8% vacant positions, but we have watched our number of vacant positions drop to 6% in 2023 to 3.5% currently.

Rockwood has strived to develop a healthy workplace culture, one that is engaged and supportive. We have 35 people who have worked at Rockwood for over 10 years, 15 people with over 25 years, 5 people with over 30 years, and 1 employee who has worked for Rockwood for over 40 years. We are honored to have so many dedicated and engaged team members working here.

Rockwood has embraced some creative ways to hire dedicated people, and to create value in working at Rockwood to hopefully mirror the forementioned longevity. Team members receive a full day of orientation, and we utilize WeCare Connect to survey new team members at 14, 45, and 75-day intervals to proactively address concerns and provide support, helping to reduce turnover and receive real time feedback as a quality improvement measurement.

In 2024, we promoted Bruce Burns from Systems & Plant Manager to Environmental Services Director. Bruce has been with Rockwood since 1996, starting in the Maintenance Department, and he has learned the intricacies about the building systems at Rockwood South Hill. We also welcomed Michael Droppers, Chelle Smith and Kristin Youmans to Rockwood and recognize them for their skills and experience that they bring to our organization. Each of these persons work in key roles of service and support to our residents and team members. Working together, we build teams where everyone can be a Rock Star, knowing that they make a difference in our residents' lives and the success of our organization.

We also celebrate several Rock Stars who were recognized by LeadingAge Washington for their Excellence. Jody Messenger and Marie Wickesser both received the Excellence in Caregiving Award, and Jason Druffel received the Excellence in Workplace Award. And lastly, Eowyn Sallis received a national honor of Sales Director of the Year from Greystone.

As our organization grows, we will continue to uphold high standards to be an employer of choice, seeking new ways to engage our team members and serve our residents with a commitment to excellence.

Solid Foundation

*Marianne McCormack
Director of Development*

*Patty Conaty,
Foundation Chair*



What a great year! As I reflect on the many things your Rockwood Residents Foundation has accomplished this past year, I am proud to serve as its chairperson.

Thanks to the hard work of the residents, management and team members, including work “in the trenches”, and your generosity in contributing to the Foundation, we are strong and have a great future. We are fulfilling our mission of “providing excellence in service and housing to older adults by promoting independence, wellness and lifelong vitality.”

Our list of how we’ve supported our communities on the following page is impressive! We were also able to host some “friend raisers”, meaning no charge to attendees, including the free shredding day and food truck rallies and provided an amazing musical performance with Zuill Bailey and Awadagin Pratt.

Thank you all for your amazing generosity in helping us meet our goals at both campuses for the fiscal year 2024. The South Hill raised \$760,390, exceeding our goal by \$45,390. Rockwood at Whitworth raised \$53,879, exceeding our goal by \$18,879.

We created an Affordable Housing Fund to support Appleway Court and also completed a new Employee Break Room.

My appreciation for your generosity also extends to all of the volunteers in many areas, including our board trustees and members of our committees -- Investment Advisory Committee, Advisory Committee for each campus, and Partners in Philanthropy Committee. Also, the Corner Store volunteers and those who contribute to it have provided the Foundation with funds throughout the years. Thank you to all who have given countless volunteer hours in support. You will notice their success in the closing article.

The driver of the Foundation, and a huge part of its success, is our phenomenal Director of Development, Marianne McCormack, assisted by Kelsey Garrett. Marianne does not know a stranger and has the ability to connect with everyone with her genuine interest and her always upbeat personality... not to mention her attention to detail and determination to help us reach our goals.

Our finances are strong, with a balance of over \$11 million which, again, allows us to achieve our goal of helping others.

As I have said before, “It Takes A Village”, and I am forever proud to be a part of our village, which is so generous, and of this Foundation.

Wait until next year -- plans for an auction in April and more promising new ideas!

– Patty Conaty



Here's How Your Foundation Support Made A Difference in FY2024:

- Provided free shredding services to residents**
- Added 8 Rockwood at Whitworth residents to the Foundation Board and Committees
- Increased funding for our Employee Food Pantries**
- Hosted a Food Truck Rally**
- Provided funding for the Woodshop RSH
- Provided funding for Exercise Equipment at RW
- Provided funding to host a lecture series by Whitworth University Professors at RW
- Implemented the Foundation's new Strategic Plan (2024 - 2026)
- Hosted a Father's Day BBQ for RSH Healthcare residents and their families
- Increased employee educational scholarships per employee from a maximum of \$1,000 per year to a maximum of \$2,000 per year
- Awarded \$23,000 in scholarships (CY 2024)**
- Awarded \$25,000 in Employee Financial Assistance (CY 2024)**
- Provided \$286,000 in Residents' Assistance at RSH
- Provided \$61,000 toward Wellness & Exercise at RSH
- Provided \$14,700 in Residents' Assistance at RW

**both campuses

Major fundraising successes in FY2024 included:

- RSH 2023 Holiday Lights: \$226,978
- RW 2023 Stars In Our Lives: \$21,395
- RSH 2024 Tea Party: \$4,975
- RSH & RW 2024 Luncheon: \$15,834
- RW 2024 Wine Tasting: \$8,180
- RSH Car Wash: \$2,000
- RW Car Wash: \$1,000
- 2024 RSH Holiday Market: \$3,700
- 2023 RW Holiday Market: \$977
- Fiscal Year 2024: Farmers Market Baked Goods: \$3,050

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 October 18, 2024).

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
Barbara Augusta
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
Dave Dierdorff & Madeleine Lefebvre
Dan & Elsa Distelhorst
Dave & Sara Ensor
Anne & Bernie* Fox
Anne Franke & Michael West*
Harry Fuhs
Dick & Judy Gammon
Bill & Maureen Green
Judy Grollmus
Ted & Diane Gunning
Victor Gruol & Jill Bennett
Mark & Marion Hammer
Don & Donna Harbaugh

Bill & Donna Harsell
Jim Hiller
Jim* & Judy Hughes
Hal Hunt & Claudia Smith
Walt & Shirley* Jakubowski
Rosa Lee Johansen
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
Don Oakley

John & Diane Packard
Margaret Patterson
Carla Peperzak
Charles Peterson
Bill & Vern Prouty
Ann Quinn & David Cooling*
Fred Radebaugh
Carolyn Reed
Mike & Tanya Rice
Gene & Bonnie Roth
Brooks C. Sackett
Eowyn Sallis
Mary Beth Shinn
Joanne Slavin
Gil & Christi Smith
Connie Stacey
Phebe Thompson
Sam* & Harriet Van Wyck
Wally* & Lynn Volwiler
Monica & Kent Wales
Brusan Wells
Brent & Susan Wilcox
Dr. Laurence & Dian Wiwatowski
Don & Judi Young

*Deceased

New Legacy Circle Members highlighted in red.

Annual Donors

June 1, 2023 - May 31, 2024

The Rockwood Residents' Foundation is greatly appreciative of gifts of all amounts.

Donations of \$50,000+

Anonymous
The Estate of Bob & Elaine Bariletti
Jim* & Marion Park

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

The Estate of Rod and Carole Walker

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

John & Joan Anderson
Greystone Inc.
Sally Kleaveland
Delbert * Eva Lusk
John & Diane Packard
Donna Rockstrom
Eric & Terry Sorensen
Doug* & MaryAlice Stoner
Dick & Carol Wendle

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

Anonymous
Dave & Mari Clack
Leroy & Sallie* Clemons
Leona Dater
Dave Dierdorff & Madeleine Lefebvre
Dave & Sally Ensor
Harry Fuhs
The Estate of Joe Grismer
Ted & Diane Gunning
Inge Hendron
Rick & Karen Meyers
The Estate of Dewey Muhleman
Doris Sutherland

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

Anonymous
Anonymous
Anonymous
Sid Barth
Claudia Biggs
Rick & Maureen Boutz
Jane Bowen
Fran Brewer
Jim Calderhead*
Keith & Patricia Clark
Ned & Stephanie Clayton
Caring Communities
Jim* & Patty Conaty
Tom & Laurie Connolly
Jay & Carolyn Cooper
Helen Donigan
George & Doris Dyer
Stan* & Jody* Fergin

Parker Field
Jeffry Finer
Margot Fitzgerald
Pete* & Pam Glass
Mark & Marion Hammer
Bill & Donna Harsell
Don & Janet Hart
Jim Hiller
Jim* & Judy Hughes
Hal Hunt & Claudia Smith
Kay Rowley
Walt & Shirley* Jakubowski
Paul & Judy Jaremko
Leroy & Chris Johnson
Peter & Diane Joss
Judy Hamel
Maurice & Mitzi Keeler
Pat Kelley & Kirby Oak
Bob Koppe*
Michael* & Betty Leinweber
John Lemons
The Estate of Louis & Margery Livingston
Todd Maddock
Jim & Sue Malm
Shirley Marpe
Jim & Amy Maxwell
Mary Ellen Mays
Kip & Alice McKeever
Ray & Christie Miller
Correen Morrill & Mike Jackson
Sue Morris
Geoffrey* & Susan Nunes
Bob* & Diane Notske
Allan Nye
Don & Marion* Oakley
Lynn Ophus
Lois Packer*
Bob & Jean* Panther
J. Scott Patnode
Georgene Patten
Margaret Patterson
Carla Peperzak
Richard & Dorothy Pierce
Bill & Vern Prouty
Fred & Muriel* Radebaugh
Gigi Ray
Amy Roberson
Brooks C. Sackett
Jody Sahlin
Bern Sheldon
Mary Beth Shinn
Gil & Christi Smith
Dick* & Connie Stacey

Jerry* & Marilyn Stocker
Ken & Lee Swedberg
Edy Thogersen
Rick & Diane Thomas
Phebe Thompson
Sam* & Harriet Van Wyck
Lee & Doni Walker
Pat* & Carol West
Howard & Miriam Wilcox
Peter* & Charlotte Yocom
Don & Judi Young

Donations of \$500--\$999

Anstey Hodge
Elisabeth Van Atta
Wayne Attwood*
Jennifer Bertram
Brad Blegen
Sharlyn Bounous
Buck & Sharon Bouten
Karin Brocksbank
Bob Cavill
Margaret Clark
Bob* & Sandy Compton
David Cooling* & Ann Quinn
Dan & Elsa Distelhorst
Ruth Elkins
Bill & Judy Ellington
Frank* & Gayle Faha
Dick & Judy Gammon
Jim & Dodie* Gerding
Jeanne Greene
William* & Linda Greene
Sandy* & Dotty Greer
Judy Grollmus
Ken & Marilyn Hallet
William* & Nancy Henry
Vernice Hunnicutt
Phil & Ruth Isaak
Allen* & Rosa Lee Johansen
Mike & Linda Jones
Diane Kelly
Jack* & Felicia Kendall
Louise Klouda
Delone & Eileen Krueger
Peter LaRowe
Eric & Donna Larson
Peg Leslie
Will & Debbie Long
John & Kathy Ludders
Ed & Jo Mack
Marianne McCormack & Kevin Dudley
Kathy Myers

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

Mike & Laurel Nissley
Jack Nyman
Charles Peterson
Martin & Margie* Phillips
Bruce Preuninger
Shirley Price
Mike & Tanya Rice
Anna Roberts
Dan Schaffer & Mary Lou Johnson
Pat* & Diane Sullivan
Oscar* & Lois Thomason
Jim & Lynn Watts
Anne Franke & Michael West*

Donations of \$100--\$499

George & Jan Abrams
Mary Beth Aldrich
Linda Anderson
Deane & Susan Arganbright
Leroy & Mary Ashby
Nancy Aston
Barbara Augusta
Trevor & Hailey Auston
Chris & Allison Bafus
Gene & Kay Baker
Gary & Glenda Bakken
John & Sindy Barber
Jim & Jill Barrington
Tim Barz
Brad & Kathy Beal
Gerri Beal
Bob Beschel
Lynda Betts
Tom & Lori Bishop
Jeffrey & Jonell Block
Barb Bonino
Beth Bornhoft
Will & Kate Bradley
Pat Branz
Penny Brown
Bruce Burns
Camilla Mounts
Betsy Carosella
Warren & Marilyn Carpenter
Bob & Kim Cederholm
Jon & Cindy Chandler
Bob & Charlene Clark
Anita Cole
Mary Jane Corliss
Alan & Missy Curryer
Dan DeBoise
Audrey DeBow
Andy & Diane DeMott
Jim & Ruth Dillon
Pauline Dingman
Mike & Joan Dragnich
Jason & Rachel Druffel

Helen Durgan
Dan Eacret & Kay McDonald
Laura Elmaliah
Donna Fishel
William & Joan Flatt
Candace Frasher
Arthur & Lynn Freeman
Jack* & Edie Fruit
Gary Dyer
Sarah Gassman
Gil* & Yvonne Goodwater
Andy & Debbie Gorton
Suzy Grainger
Jill Bennett & Victor Gruol
Nancy Hand
Molly Hannan
Sandy Hatch
Mary Heath
Jann Hermann
Helga Hirsch
Doris Holdaway
Ed Huneke
Hunter & Barbara Keen
James & Mary Hutton
Beverly Junker
Jean Jalufka
Ed & Laura Jenkins
Roy* & Helen Jeremiah
Tom & Ruth Ann Johnson
Christopher & Tina Johnston
Mike & Neeli June
Marty & Janyce Keeling
Phil & Leah Kimball
Gary & Diane King
Peter & JoAnn Klager
Stephanie Klein
Steve & Peggy Koehler
Gerry Lamers
Jarrett Lange
Renee Larocca
Carol Lawton
Ed & Kay Lester
Marlys Ludke
Norm & Roz Luther
Bill Lutz*
Spike & Molly* Lynch
Holly & Jason MacLeod
Doug & Sharon Matthews
Julie McIntosh
Dennis & Diane McMinn
Don* & Linda McWhorter
Mary Lew Miller
Daniel & Sheila Miranda
Bernice Moore
Tom & Mary Mosher
Jerry White & Linda Moulder
Marian Nelson

Frem & Marta Nielsen
James O'Connell
Emiko Ogawa
Joan Olson
Tess O'Neill
Kurt & Gayle Orton
Robyn Parks
Bill* & Connie Paulson
Molly Philopant
Shirley Piffer
Dwayne & Valynn Putzke
Beryl Puu
Henry Dean Puu
Howard* & Lois Redmond
Carolyn Reed
Larry & Tammy Reid
Dave* & Millie Roberts
Gene & Bonnie Roth
Mary Rutherford
Eowyn Sallis
Phil & Marilyn Sandberg
Raymond Schmitt
Tiffani Schmitt
Larry & Gina* Schrock
Chuck & Paddy Shannon
Curt & Wendy Shoemaker
Donna Klein & Dave Singer
Lynne Sisson
Judy Sneed
Mary Spangenberg
Steve & Judith Spelman
Brent Stanyer
Debbie Takami
Bea Thompson
Evelyn Ungaro
Lisa VanMansum
Monica Waitt
Kent & Monica Wales
Ann Warrington
Steve & Raye Wentworth
David & Verna Wetmore
Ray & Carol Wheeler
Tom & Cathy White
Brent & Susan Wilcox
Richard and Harriet Bloom Wilson
Neal Winkle
Dr. Laurence & Dian Wiwatowski
Carol Ytreeide
Elaine Zant
Ron & Sue Zimmerman

Cumulative Lifetime Donors

through May 31, 2024

Angels

Donors with lifetime giving in excess of \$1,000,000

Anonymous

Visionaries

Donors with lifetime giving between \$500,000 & \$999,999

Will and Foxy Lorenz

Wally* & Lynn Volwiler

Developers

Donors with lifetime giving between \$250,000 & \$499,999

The Estate of Catherine Bernhard

The Estate of Merle LePouce

The Estate of Earl & Juanita Peterson

Sustainers

Donors with lifetime giving between \$100,000 & \$249,999

Bob* & Elaine* Bariletti

Glenmar Childers*

Eugene* & Romaine* Clouse

The Estate of Neal & Helen Fosseen

Vern Gates*

Larry* & Lois Hayden

George* & Helen* Ingraham

The Estate of Louis & Margery Livingston

Jim* & Marion Park

John* & Janet* Peterson

Ausey H.* & Betty* Robnett

The Estate of Jim Schafer

Dr. Elizabeth Welty*

The Estate of Margaret S. Williams

Sponsors

Donors with lifetime giving between \$50,000 & \$99,999

Fred Alderson*

Greystone

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

Donors with lifetime giving between \$25,000 & \$49,999

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

Parker & Andrea* Field

Kay Freehill*

Harry Fuhs

Anna Mae Graham*

Miriam Hatch*

Harry* & Inge Hendron

Elizabeth "BJ" Hulteng*

Hugh* & Mary* Johnston

Alice Kennedy*

Dick* & Sally Kleaveland

Chuck* & Peg Leslie

Delbert* & Eva Maria Lusk

Correen Morrill

Dorothea Marshall

Ted* & Barbara* Morse

Stan* & June* Olson

The Estate of Merrill O'Brien

John & Diane Packard

Bill & Vern Prouty

Roy* & Katherine* Snipes

Eric & Terry Sorensen

Dick* & Connie Stacey

Jerry* & Marilyn Stocker

Douglas H.* & MaryAlice Stoner

Eric* & Elizabeth* Tobert

Chuck* & Gwen Yoke

*Deceased. Names in red indicate those who moved up a level during FY 2024.

Patrons

Donors with lifetime giving between \$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
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ROCKWOOD SOUTH HILL

Foundation Support Given

Residents' Assistance:	\$286,000
Community Benefit:	109,203
Wellness and Exercise:	88,190
Employee Support:	29,030
Total Support Given to RSH:	\$512,423

Income

Contributions:	\$923,796
Corner Store Revenue:	94,338
Investment Income and Other:	1,428,000
Income Total:	\$2,446,134

Expenses

Foundation Support Given:	\$512,423
Administration/Other:	165,938
Expense Total:	\$678,361

Fund Balances

Residents' Assistance:	\$6,817,676
Wellness and Exercise:	1,689,653
Deferred Gifts:	953,164
Community Benefit:	673,973
Staff Development:	206,829
Employee Financial Assistance:	185,205
Total Funds:	\$10,526,498

ROCKWOOD AT WHITWORTH

Foundation Support Given

Residents' Assistance:	\$14,700
Community Benefit:	4,931
Employee Support:	13,857
Total Support Given to RW:	\$33,488

Income

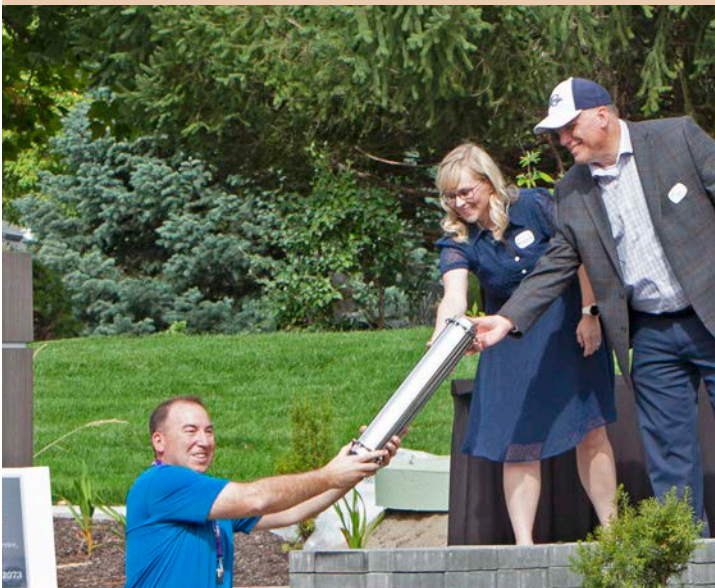
Contributions:	108,425
Investment Income:	45,477
Income Total	\$153,902

Expenses

Foundation Support Given:	33,488
Administration/Other:	57,116
Expense Total:	\$90,604

Fund Balances

Residents' Assistance:	\$460,527
Employee Financial Assistance:	34,814
Community Benefit:	26,919
Lasa Kaul Staff Development:	11,406
Scholarship Fund	9,588
Total Funds:	\$543,254



Rockwood Residents' Foundation's financial statements are audited by DZA 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.

Corner Store



It started on February 8, 1990. That's the day your beloved Corner Store was issued its Certificate of Incorporation. However, our records only go back to 1996 when our wonderful Accounting Manager, and Foundation Advocate, Debbie Long arrived. She's been keeping close track of and supporting your Corner Store since then.

The original Corner Store managers were residents Carl and Elizabeth Guenzel. Back then the Corner Store featured a yogurt bar and popcorn station. Other Corner Store managers and coordinators throughout the years include Ella Marie White, Connie Milton, Sheryl Savas, Jean Jalufka, Jane Bowen, Barb Bonino, and Linda Simpson.

The original Corner Store was only half of its current size and did not include the Furniture Alcove. As the South Hill campus grew, so did the Corner Store, and its number of resident volunteers. Today the Corner Store is run by approximately 50 volunteers, and all of the proceeds go to your Rockwood Residents' Foundation's Residents Assistance Immediate Need Fund. The Corner Store plays a critical role in the Foundation's ability to provide support to residents, who exhaust their financial resources through no fault of their own, to be able to continue living in their Rockwood home.

Fiscal year 2024 was a milestone year for the Corner Store as it reached the one-million-dollar mark! Between 1996 and May 31, 2024, your Corner Store has raised **\$1,094,990.40!** That is a pretty amazing feat, considering you can still find great bargains for as low as .25 cents. On behalf of the Rockwood Residents' Foundation, thank you to everyone who has ever volunteered for and shopped at the Corner Store!

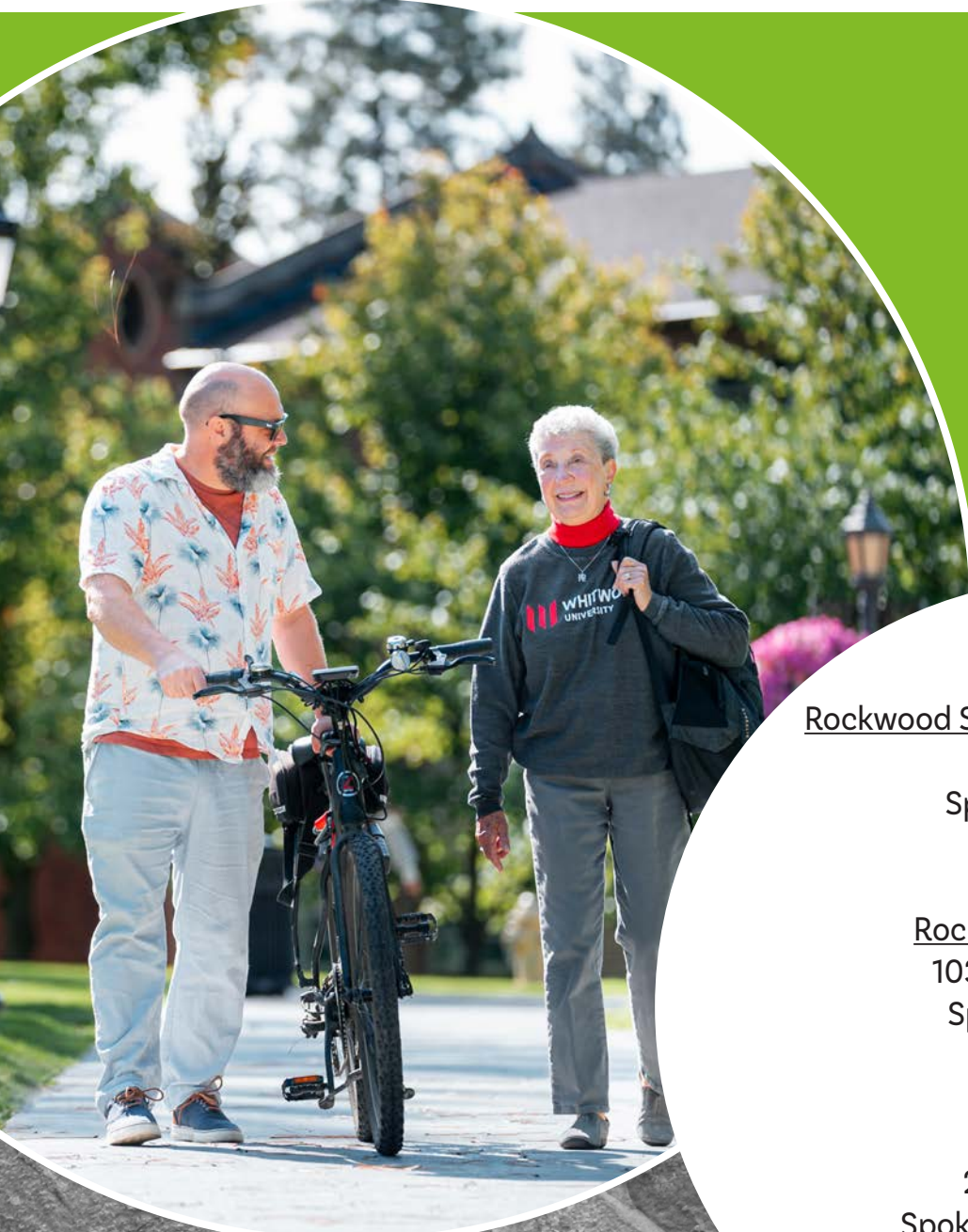


Rockwood
RETIREMENT COMMUNITIES

2903 E 25th Ave

Spokane, WA 99223-4992

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Rockwood South Hill & Corporate Office

2903 E 25th Ave
Spokane, WA 99223
509.536.6650

Rockwood at Whitworth

10322 N Middleton Dr
Spokane, WA 99218
509.466.0411

Appleway Court

221-225 S Farr Rd
Spokane Valley, WA 99206
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