

Goodwin Living Foundation

Together, We Change Lives.



Fiscal Year 2022 Annual Report

BUILDING A **FOUNDATION OF HOPE**

FISCAL YEAR 2022 | BY THE NUMBERS

The Goodwin Living Foundation depends on generous support from donors who help make all our programs possible. Every gift counts!

Annual Fund

Area of Greatest Need	\$947,167
Resident Support Fund	\$414,362
Staff Support Fund	\$219,010

Total	\$1,580,539
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Realized Bequests	\$3,329,457
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Annuities	\$10,000
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Permanently Restricted	\$2,812
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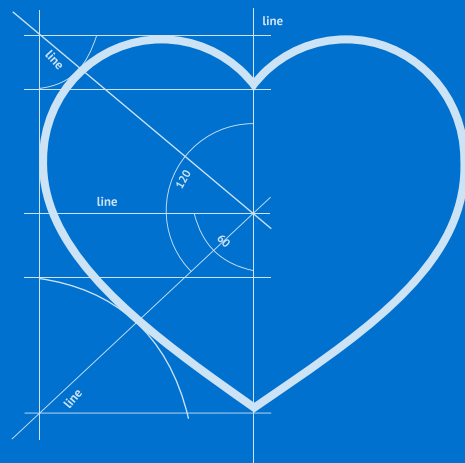
Temporary Restricted Funds	\$545,247
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Total Contributions in FY2022	\$5,468,055
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Please note that in producing this Annual Report, every effort has been made to list our donors as they would like to be listed and in every category associated with their gift made during the 2022 fiscal year (October 1, 2021 – September 30, 2022). If you find an error in our reporting, please contact Valerie Burke at VBurke@GoodwinLiving.org or 703.824.1345. We sincerely thank you for your ongoing support!

Throughout this report, you will see an asterisk () next to the names of those who were deceased as of 10/31/2022.*

Building a Foundation of Hope





Goodwin
Living

HIGHLIGHTS OF OUR YEAR, MADE POSSIBLE BY YOU!

861 donors

made gifts of \$500 or less, and those gifts totaled more than \$242,480!

Music was abundant.

More than **270 music therapy sessions** touched the lives of many residents in memory care and assisted living.

Tribute gifts

are thoughtful ways for our donors to express their support for the Foundation while keeping the memory of a loved one alive, uplifting and honoring a friend (be they human or canine!), recognizing the dedication of a team member or supporting the efforts of a volunteer. Last year, the Foundation received **687 gifts** that were either in honor or in memory of someone who was special to the donor, with such gifts totaling over **\$200,000!**

129 team members

benefited from donations to our Staff Support Fund for the pursuit of further education.

Now on the path to citizenship

this year alone, **25 people** are looking forward to the security that citizenship provides.

More than \$105,000 in grant support

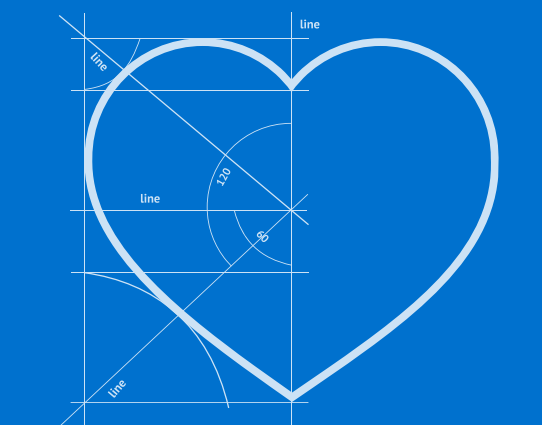
was provided to **48 team members** who were facing financial hardships.

Since welcoming our first resident in 1967

Goodwin Living has never asked someone to leave because they exhausted their financial resources through no fault of their own. We can keep this commitment to residents and their families, thanks to our Resident Support Fund, which is fully funded by the Foundation. In the past year, over **\$475,000** was provided to meet this commitment for **16 residents.**

Incalculable is the number of smiles, burdens lifted, memories made stronger, grocery bills lowered, minds expanded, dreams imagined for the future, toes tapping to tunes from childhood and lives changed, be it through small or large ways, thanks to you, our donors.

Together, We Change Lives!



Dear Goodwin Living Family,

The theme of this annual report is **“Building a Foundation of Hope.”** This past year, through the collective generosity of so many individuals, corporations and foundations, we were able to build a solid foundation to empower, uplift, engage and strengthen our Goodwin Living family.

We believe the growth in generosity from this past year can be attributed to several factors:

1. We found new ways to tell our story.

Through events like our tuition assistance panel, and the numerous ways we promoted our citizenship program, more people learned about the remarkable things we are doing with the power of philanthropy!

2. We found a lot of storytellers to help us.

Talk about a team effort! There were so many people who joined us in helping to tell our story—new team member volunteers, resident volunteers and even team members who are not officially “volunteers” but simply talk about the good things that can happen in a community of generosity! That good news is contagious, and so is the energy our volunteers give us.

3. We tried new things.

We leveraged the creative ideas from our donors who encouraged us to try new ways to support our team members.

All these examples begin to paint a picture of the Foundation being integral to our community, and they reinforce the fact that the generosity shared with the Foundation is making a palpable difference. Throughout the year, we seek — and celebrate — this incredible generosity and are so appreciative for all who support our mission. We hope that as you look through this report, you will see how the power of philanthropy — gift upon gift — built a strong and sustained *foundation of hope* for all of those in our community.

With gratitude from your small but mighty Foundation team,

Valerie Burke

Mary Kate Roberts

Allison Smigel

James Woodward



OUR MISSION

Through the power of philanthropy, we seek and celebrate generosity to carry out the mission of Goodwin Living, to provide financial security to residents, to enable staff to thrive in their careers, and to support innovation, thus enhancing the lives of older adults and those who care for them.

Goodwin Living Trustees & Goodwin Living Foundation Directors

The community leaders and citizens who serve on the Goodwin Living and Goodwin Living Foundation boards set the tone for the Foundation as ambassadors of our mission. They demonstrate a passion for our community and for supporting, honoring and uplifting the lives of older adults and those who care for them. Their actions and their contributions reveal their commitment.

FY2022 Goodwin Living Board of Trustees

Mary Lewis Hix, Chair
Garrett W. Erdle
Tucker Eskew
Deborah K. Forbes
Lisa Giesler
Dr. Janet Hansen
Katie Horton
Dr. Dora Hughes
Nina Janopaul
Dr. Tammy L. Mann
Ben Marcantonio
Dr. Mark Mellott
Vipin Sahijwani
Dr. Anthony J. Tambasco
John Weaver
Thomas C. West

FY2022 Goodwin Living Foundation Board of Directors

Gant Redmon, Chair
Laura Bailey
Laurie J. Blackburn
David Canfield
Sara DeCarlo
Robert C. Eiffert
Kimberly A. Fiske, Esq.
Deborah K. Forbes
John H. Komoroske
Robert E. Long
Judith Miller
Joan M. Renner
Anne D. Stewart
Dr. Anthony J. Tambasco
Donnan C. Wintermute





Laura Bailey

Goodwin Living Foundation
Board of Directors Member,
Daughter of Resident

"Goodwin Living is unique because the people who have chosen Goodwin—whether to work or live there—are very, very special. On a daily basis, they create a community that cares for each other. I've really never seen such love for seniors from caregivers, and such care for the staff from senior residents. There is clearly respect for one another.

I can remember visiting Goodwin House Bailey's Crossroads when my mother, Joan Nagle, first moved in. I thought it was a gorgeous place. Over the years, I was an overnight guest, a dinner companion, and I really got to know quite a few people who live there. When I later moved to the D.C. area and my mother was on the assisted living floor, my sister and I were so amazed at the caring people and their ability to meet any new situation. Their care was so great that it extended to us, which is just amazing.

We give to Goodwin Living in honor of my mother, but also really knowing that this is an exceptional place. We love the spirit of Goodwin Living people!"

Resident Volunteer Committees

The Goodwin Living Foundation Resident Volunteer Committees consist of a select group of residents who have demonstrated a supportive commitment to the Foundation. The Resident Volunteer Committees serve as an advising and advocacy group for the Foundation to provide feedback on fundraising matters and strategy, to serve as passionate advocates who connect, engage and inform other residents in the Goodwin Living community about the goals of the Foundation and to promote the impact of generosity.

Goodwin House Alexandria Resident Liaison Committee


Dan Botticello
Peggy Burke
Joan Lamb
Grace Lynch
George Pera
Mark Raabe
Judith Roach
Gwen Scheffel
Sally Via
Bob Wallace*

Goodwin House Bailey's Crossroads Resident Liaison Committee

Hal Bean
Joanie Dellefield
Jennifer Frum
Frank Hart*
Beverly Hennessey
Carole Hunt
Mike Molino
Paul Lannon
Mary Lee Payton
Ben Wilmot

Resident Advisory Committee for Staff Support

Betsy Bailey
John Berry
Claudia Blake
Joanne Bowers
Peggy Burke
Todd Endo
Jim Fulton
Carolyn Gilligan
Mädi Green
Judith Miller
Betty Reinecke
Anne Soens
Margaret Sullivan
Gretchen Thompson
Joan Vogel



Household Items, Fine Arts & Crafts Support the Foundation

After spending years accumulating possessions, many residents often desire to let go of items they no longer need or want. The **Market Place** at GHA and the **WhatNot Shop** at GHBC are two places where residents donate many of these unwanted treasures, knowing that they will go to help create new gifts for the Goodwin Living Foundation and bring joy to their new owners. Additionally, the GHA **Craft Shop** offers hand-made items, and residents at both houses sell fine art. The **Holiday Bazaar** at GHBC is an event that many look forward to each year. All proceeds from sales, \$40,367.33 in FY2022, go to the Foundation's Resident Support Fund.

Thank you to the residents and team members who were valuable participants and leaders with these auxiliary programs, including the Market Place and Craft Shop at GHA, the WhatNot Shop and Holiday Bazaar at GHBC, art sales commissions, holiday card sales, and craft fair sales. The Foundation is grateful for all who have donated items, and we especially thank the customers, the many volunteer workers and the residents who dedicate their time and talents to these efforts.

GHA Market Place

Gail Brown
Judy Bryan
Sandy Connolly
Judy Davis
Dottie Evans
Robin McFarland
Kathy Mukai
Sandy O'Keefe
Jackie Phillips
Tom Sproull
Bob Wallace*
Dick Wilson

GHA Craft Shop Volunteers

Barbara Bancroft
Frances Barnett
Flo Broussard

Amoret Bell Bunn
Linda Carder
Rosemary Carle*
Robin Gates
Jane Jordan
Grietje Meiborg
Jane Sara
Molly Wood

GHBC Holiday Bazaar

Betsy Bailey
Joanie Dellefield
Elsa Edwards
Roberta Fox
Carole Laird
Barb Molino
Lucy-Lee Reed
Betty Reinecke

GHBC WhatNot Shop Volunteers

Shirley Harjes
Barbara Haught
Beverly Hennessey
Kay Miller
Eleanore Perkins
Stefanie Reponen
Donna Sosin



Staff Ambassador Committee

The Staff Ambassador Committee consists of team members who are positive and enthusiastic supporters of the Goodwin Living Foundation and its mission. Committee members help to educate colleagues about the goals of the Foundation, to share the stories of the Foundation's impact in the community and to encourage their financial support.

Charity Ampong
Josh Bagley
Selamawit Belete
Christy Clark-Bolden

Sue Dolton
Cathy Farmer
Amadu Kamara
Kathie Miller

Theresa Thomas
Zainab Thomas
Adrienne Wyman



Citizenship Resident Tutors

Made possible by the power of generosity, the Goodwin Living Foundation provides grants to staff and their immediate family members that fully cover the cost to apply for U.S. citizenship. Additionally, residents from Goodwin House Alexandria and Goodwin House Bailey's Crossroads recruit and train resident volunteers who provide tutoring to any grant recipient who wishes to receive it. We are grateful to those who dedicate their time and support of this transformational program—our Goodwin Living family is stronger together!

Anne Baxter
John Berry
Khacki Berry
Ric Blacksten
Rhonda Buckner
Mary Bullock
Sandy Connolly
Sue Cook
Kathleen Dunn
Pat Gottemoeller
Judy Hansen
Phil Harrick

Anne Heanue
Janet Horwitz
Carl Miller
Jill Miller
Fred Morhart
Barbara Morris
Sue Robbins
Absara Rogosch
John Rogosch
Sandra Tinkham
Eunice Welch



FY2022 Citizenship Celebration Committee

Betsy Bailey
Anne Baxter
John Berry
Claudia Blake
Peggy Burke
Donna Cornman

Carolyn Gilligan
Pat Gottemoeller
Mädi Green
Judy Hansen
Carl Miller
Jill Miller

Judith Roach
Rita Siebenaler
Margaret Sullivan
Gretchen Thompson
Joan Vogel

Quality of Life Committee

The mission of the Quality of Life (QOL) grant program is to explore innovative programs that encourage social interaction among Goodwin Living residents through resident-initiated programs not yet funded or included in any Goodwin Living budget. The QOL grant program provides seed money to initiate, build and support resident-led activities outside of departmental budgets.

Claudia Blake
Co-Chair, GHBC
Jonathan Bryan
Co-Chair, GHA
Alyce Bassoff

Ruth Corlett
Dennis Detlef
Paul Gordon
Marilyn Gould
Bob Harris

Jackie Phillips
Betty Reinecke
Betty Wallace
Faye Woodrow
Jeanette Wurster



"Kindness and respect are two pillars of personal importance to me. I try to live by those, and I'm so proud that the Goodwin Living community does as well. The residents here are friendly, interesting and fun, and the staff members care so much. The Foundation exists to support all members of the Goodwin Living community in myriad ways. That is important to me, and that is why I continue to support the Goodwin Living Foundation."

Paul Gordon
Resident



FISCAL YEAR 2022 | ALL GIFTS RECEIVED

(October 1, 2021 - September 30, 2022)
totaled \$5,468,055

The Foundation's Annual Fund is critical to not only support the residents and team members in need each year, but also to expand the ways and places we serve older adults and those who care for them through new programming and additional staffing and resources.

The FY2022 Annual Fund raised \$1,580,539, which exceeded the \$1,500,000 goal.

The three main areas of the Annual Fund and funds raised in FY2022 were:

\$414,362

Resident Support Fund

\$219,010

Staff Support Fund

\$947,167

Area of Greatest Need

Sources of income in addition to the Annual Fund were:

\$3,329,457

Realized Bequests

\$558,059

Temporary Restricted Funds, Permanently Restricted Funds and Annuities
(e.g. Gifts to Hospice, to the Chapel, and to the Anderson Fund)

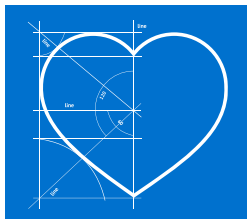




WHERE DOES THE **ANNUAL FUND MONEY GO?**

Residents - Resident Support Fund (formerly Fellowship)

This fund is where donors allocate their gifts when they are passionate about helping those who run out of financial resources. Many residents and family members have peace of mind knowing that when they move to Goodwin House Alexandria or Goodwin House Bailey's Crossroads, they will never have to move again, even if they outlive their financial resources. We are so grateful to have this gift of home provided by the many donors over the years who have supported the Foundation for this purpose.



In FY2022, a total of 16 residents received Resident Support with expenses totaling over **\$475,000.**

Staff - Staff Support Fund

Staff Support - Citizenship Application Fees

Goodwin Living team members come from more than 60 different countries, and many do not hold U.S. citizenship. The current cost to apply is \$725, which can be a significant deterrent. Started in 2018 from a resident's idea, our Citizenship Application Fee program has already supported more than 120 team members by providing them with a grant that covers the full cost to apply.

- **In FY2022, \$19,460 was provided for our unique Citizenship Application Fee Program.** Seventeen Goodwin Living team members received citizenship application fee grants, and with the increased funding we were also able to offer citizenship grants to eight spouses and children of staff. We are so grateful for the many resident volunteers who help to tutor our team members. With gifts to this fund, we also provide training materials for our resident tutors and study guides for our team members.

Anonymous Team Member

"Throughout our many years at Goodwin Living, we always knew this was a special organization to work for. More recently, my family and I experienced a life changing event of an immediate family member who unexpectedly passed away. The Goodwin Living Foundation supported us with an emergency grant to help with the funeral/burial costs. This was such a heartfelt donation that we appreciated so much. We are truly lucky to have an organization stand with us through this difficult time and provide us with this support. Thank you, Goodwin Living Foundation, for your continuous support and the impact you make on peoples' lives."

Staff Support - Tuition Assistance

This past year, we were able to offer a significant increase in our tuition assistance program for those team members who seek to advance their studies and vocational training. After six months of employment, team members could receive up to \$2,250 in tuition support, and after two years, a person could receive as much as \$4,500.

- **In FY2022, 84 Goodwin House team members received tuition assistance totaling \$201,661.80,** with additional funds for student loan repayments through a competitive application process.
- **Also, we were able to offer 47 grants of \$1,000 each to children of team members** who are pursuing higher education, through an application process.



Staff Support - Emergency Assistance

Goodwin Living always takes care of our colleagues and their families. As you can imagine, many of our team members faced financial difficulties this past year. Yet they continue to bring the same joy and commitment to caring for residents, members, patients and one another through this challenging time.



In FY2022, the Foundation provided confidential emergency assistance grants to team members in need. This program provided funds for those facing significant challenges such as overdue medical bills, car repairs for essential transportation and eviction because of overdue rent. In many cases, one overdue bill can create a domino effect for someone living paycheck to paycheck in our high cost of living area. Our ability to rally around those in need as quickly as we can is what makes our community special.

- **48 team members** received emergency assistance grants totaling just over \$105,000.
- **We distributed over \$38,000 in Giant Grocery Cards** after several Foundation donors inquired if gifts to the Staff Support Fund could be used to offer financial support to our staff members who might benefit from a little “boost” to offset high food prices.
- **We offered complimentary BJ’s memberships** to all team members so that they could take advantage of the discounted groceries and gasoline during a time when the costs of these necessities have risen sharply.

Area Of Greatest Need - Unrestricted

These unrestricted funds allow the greatest amount of flexibility to the Foundation so that we can apply these funds where they are needed the most. This past year, we utilized funds from this area to support our team members in some of the ways listed above as well as to enhance various programs such as updating sensory rooms, supporting engagement areas in the small houses, and to fund unique equipment for those who need assistance, such as the new “WhisperGLIDE” wheelchair swings.



Restricted Funds

We also received other funds that were restricted for use and allowed us to support various areas of our mission.

Some of the restricted funds helped us to provide even stronger **hospice care**—for our residents, and also for the many patients we served beyond our campuses, across the Northern Virginia region. We were able to offer over \$21,000 to provide our patients with the dignity and care they deserved at such a vulnerable time in their lives. We were able to offer truly individualized care and relief to our patients and their families with special services such as massage therapy and music therapy.

The Burns Fund in our endowment allowed us to provide approximately \$84,000 for our brain health program, including the funding of our new Brain Health Program Manager position. This fund also provided for resident engagement and programming to reduce isolation and depression, one example being a horticulture therapy called **Eldergrow**.

The Anderson Fund allowed us to do several things this year. We offered three high school seniors a \$500 college scholarship, we provided 10 team members student loan repayment grants of \$1,000 each, and we offered stipends for eight college students to participate in our summer internship program. All these efforts helped us to promote our wonderful organization, and with the hope of inspiring many to consider service in the senior living and healthcare field, it allowed us to introduce Goodwin Living to many individuals who are thinking about their careers!



**Shirley
Warthen**

Resident

*"Before coming to Goodwin House Alexandria, I always loved tending to my garden and plants. Now that I am at Goodwin House, I continue to tend to my garden, and beautiful plants—my way. Nothing much has changed, except for the fresh aroma scents I smell every day from our **Eldergrow** Garden and the wonderful friends I get to share my love of plants with. Our **Eldergrow** garden is a great addition to our home and makes us all so happy! "*

The View Alexandria

When The View Alexandria joined the Goodwin Living family in August, they transferred to the Foundation's endowment approximately \$270,000. These funds include The Samaritan Fund, a Chapel Fund and three additional funds that support the grounds and their team members respectively.



WHAT IS PLANNED GIVING?

Many people choose to make a planned gift through their will or trust (a bequest) or by making the Foundation a beneficiary of their life insurance, IRA account or donor advised fund. Donors typically make these kinds of special gifts when an organization has had a profound impact on their lives or on someone they love, and the organization has a mission that aligns with their values and passions.

Many times, a person can make a significant donation without reducing assets needed during a person's lifetime. Planned gifts enable individuals to create a powerful philanthropic legacy by making a direct impact on the causes that are important to them.

If you have made provisions in your will or estate plans, please let us know! We'd love to be able to thank you and understand what might be most meaningful to you in creating a legacy at Goodwin Living. Those who have included the Foundation in their estate plans are members of our Bishop Chilton Society.

How are planned gifts used?

Planned gifts that are restricted are allocated to whatever program or position the donor has intended, whereas those that are unrestricted are generally placed in the endowment with portions of the gift used to fulfill strategic initiatives. Unrestricted gifts always allow the Foundation the greatest flexibility for present and future use.

Lynn Perlik and Ron Perlik

Children of Resident



"Our mother, Annabel Perlik, was an enthusiastic supporter of the Goodwin Living Foundation. Over the years, Mom really enjoyed her warm and friendly connections with the staff of GHBC, many of whom were from diverse foreign countries. Having grown up overseas herself, she delighted in talking with and getting to know these hardworking and dedicated members of the community. She was grateful for kindness and care from all the staff, and was a strong advocate of continuing education. So, she was pleased to direct donations to the Staff Support Fund, which supports their tuition and citizenship application fees."

Planned Giving in Action

The Goodwin Living Strategic Plan is what guides the direction of all of the Foundation's fundraising programs. This plan, approved by the Goodwin Living Board of Trustees, is the roadmap to fulfilling our organization's mission. In the past several years, the Foundation has been grateful for some significant bequests that have allowed us to begin work on several of the strategic initiatives outlined in the plan. They have helped to establish lifechanging funds to help us live and grow our mission: an Internship Fund, a Brain Health Fund and a Staff Career Development Fund, which will help us to find solutions for our ongoing workforce challenges.

- We have advanced our programs and positions related to Brain Health in wonderful ways. We have hired three team members and funded the operating budget for our Brain Health Program, which includes the promotion of our StrongerMemory program that is available at no cost to thousands of individuals across the country to help reduce the progression of mild cognitive decline.
- We have hired two music therapists who have done extraordinary work with our residents and family members.
- We have begun several programs related to attracting top talent to work at Goodwin Living. We are pleased to have additional funding to expand our current internship program, and we look forward to putting more tools in our toolkit, thus helping us recruit and retain the very best in service to older adults.



PERSONAL STORY | A SPECIAL PLANNED GIFT

from Claire Kuntsman Trollinger



Claire Kuntsman regularly visited her sister who was a GHBC resident. Claire witnessed firsthand the loving and professional care her sister was provided at Goodwin House Bailey's Crossroads. After a few years, Claire decided to become a resident, too. She moved in and loved the community: her neighbors, the team members and all the programs and activities. Claire had a fondness for dancing, and at a St. Patrick's Day dance, she met a fellow resident named Jim

Trollinger. He also loved to dance, and after they spent the evening dancing, they soon discovered they both had a love for the same kind of music as well—Frank Sinatra, Cole Porter, Tony Bennett. Jim, a widower who had lost his wife a few years before, was smitten with Claire, and the feeling was certainly mutual. Jim and Claire fell in love, were engaged on the following Palm Sunday and married later that August. Their celebration was open to all of the GHBC community! Claire loved gaining a new family in Jim and his children, and she loved her new name: Claire Trollinger.

Claire was so grateful for the new life that Goodwin House Bailey's Crossroads had given her. In fact, she credited the community for extending her life and giving her a happiness she never knew she could have. She was a faithful donor to the Foundation to express that gratitude. Over time, she decided to make plans in her will to leave a significant gift at the time of her death. The Foundation received this gift last year, and it has helped to grow our endowment and has been used to hire two new team members. Fittingly, those two team members are music therapists who are trained to use music for therapeutic purposes.

We sincerely hope that other individuals will share their gratitude and help us continue to offer enhanced programming such as music therapy in the future. Claire has left our community a wonderful legacy and her love and loyalty has left us all dancing!





Janice Jensen

Resident

"As new residents at GHBC in March 2022, my elderly golden doodle Dixie was the queen, and I was her consort. Actually, she was more like a rock star, with her Beyoncé-like crazy, purple-streaked hair, her calm demeanor and immensely positive effect on people.

Dixie was a conversation starter, as she loved hanging out with the residents and staff. She especially loved hanging out on the Bistro patio for breakfast (and bacon) and lunch (and grilled chicken). The staff called her their Bistro Baby.

Through their stories, one piece of bacon at a time, I learned from the staff about the enormous impact of the citizenship and tuition programs on their lives and the lives of their families. I felt immense pride and awe that Goodwin House residents developed the concepts for these programs during deep dark COVID and the Foundation made them happen.

For example, because she now has a passport, Titiyana is in college and will visit her grandmother in Ethiopia this December. Karen is studying immigration law at George Mason Law School. So many personal stories. So many lives enhanced.

Dixie passed in August. To honor her memory and her eight years making a difference in people's lives as a therapy dog, I made a donation in her name to the Staff Support Fund to help with the citizenship program. My goal was for Dixie to continue making a difference in people's lives. I am honored and humbled to be part of an organization that plays such a supportive role in the lives of their staff."



Goodwin Living Foundation

Together, We Change Lives.

4800 Fillmore Avenue Alexandria, VA 22311
703.824.1200 • GoodwinLiving.org/Giving