



United in Philanthropy

Fall 2022 • Volume 4 • Issue 2

*Building
A Legacy*



I GIVE *Because...*

Paul and Dolores “Dee” Burrowes are approaching a remarkable milestone with the United Methodist Communities Foundation: this fiscal year will mark their 30th consecutive year of giving.

After serving in the U.S. Air Force and spending an additional fourteen years working on general aviation airplanes, Paul began a new career as a home improvement contractor. When commercial building jobs dried up in the late 1980s, he saw a posting from then-United Methodist Homes of New Jersey seeking someone with maintenance and construction experience. For Paul, a lifelong Methodist, the position was an interesting opportunity to fuse his faith and construction skill set.

During Paul’s tenure as Vice President of Projects, UMC built and remodeled properties in Ocean Grove and at The Shores, expanded Collingswood, and built Covenant Place and The Wesleyan. When asked which project he is most proud of, Paul was unable to pick just one—but he did share that surprisingly, he had the most fun working on land use approvals! Paul joined forces with attorney Sandy Brown and the pair went on to submit and receive 33 straight approvals without a rejection, even with very complicated projects.

“At Collingswood,” Paul explains, “we were remodeling a historic building in a downtown area and bringing it from three stories to six stories...it was incredibly challenging, but a very fun part of the job.”

Another highlight from Paul’s years with UMC was his service with LeadingAge’s predecessor, the American Association of Homes and Services for the Aging. Paul represented UMC on a national jury for

architectural designs for eldercare and visited senior communities all over the country to hear from their architects about what worked and what didn’t. “It was a cool process, and I’m sure I brought some good ideas back to UMC,” he reflected.

Later, Paul and Dee were given the opportunity to view the impact of UMC’s mission from another perspective—as family members of residents.



“Paul’s parents moved into Francis Asbury Manor, and it quickly felt like our second home. We were there all the time and we really connected with the other residents and staff,” Dee shared.

“Having my folks in one of our communities gave me a different appreciation for my work,” Paul added. “They fit in well and loved living there. It made me

feel like, as an organization, we were successfully carrying out our mission.”

Paul and Dee’s affinity for UMC’s mission prompted them to support the Foundation early on and continue into their retirement. “Right from the get-go, we were attracted to the idea of benevolent care, supporting residents who’d outlived their funds. Then, on a secondary level, we became interested in the role the Foundation can play in supporting associate education and retention.”

“It’s important to consider doing good beyond just your immediate family, to doing good for the community at large,” Paul elaborated. “A bequest intention is how we’ve chosen to give back in a meaningful way.”

Abundant Life for Seniors

can be part of **YOUR LEGACY!**



Many donors are interested in remembering their favorite charities in their estate plans but aren't quite sure how to go about it. Here are the most common types of bequests and sample language you can reference the next time you meet with your attorney or re-write your will.

Residual Bequest:

This type of bequest comes to the charity after your estate expenses and other specific bequests are paid.

I give and devise to United Methodist Homes of New Jersey Foundation, Inc., located in Neptune, New Jersey all (or state a percentage) of the rest, residue, and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest:

This type of bequest is simple; it allows you to specify a charity as a beneficiary of a specific amount.

I give and devise to United Methodist Homes of New Jersey Foundation, Inc. located in Neptune, New Jersey, the sum of \$ _____ to be used for the support of (specific community or program).

Contingent Bequest:

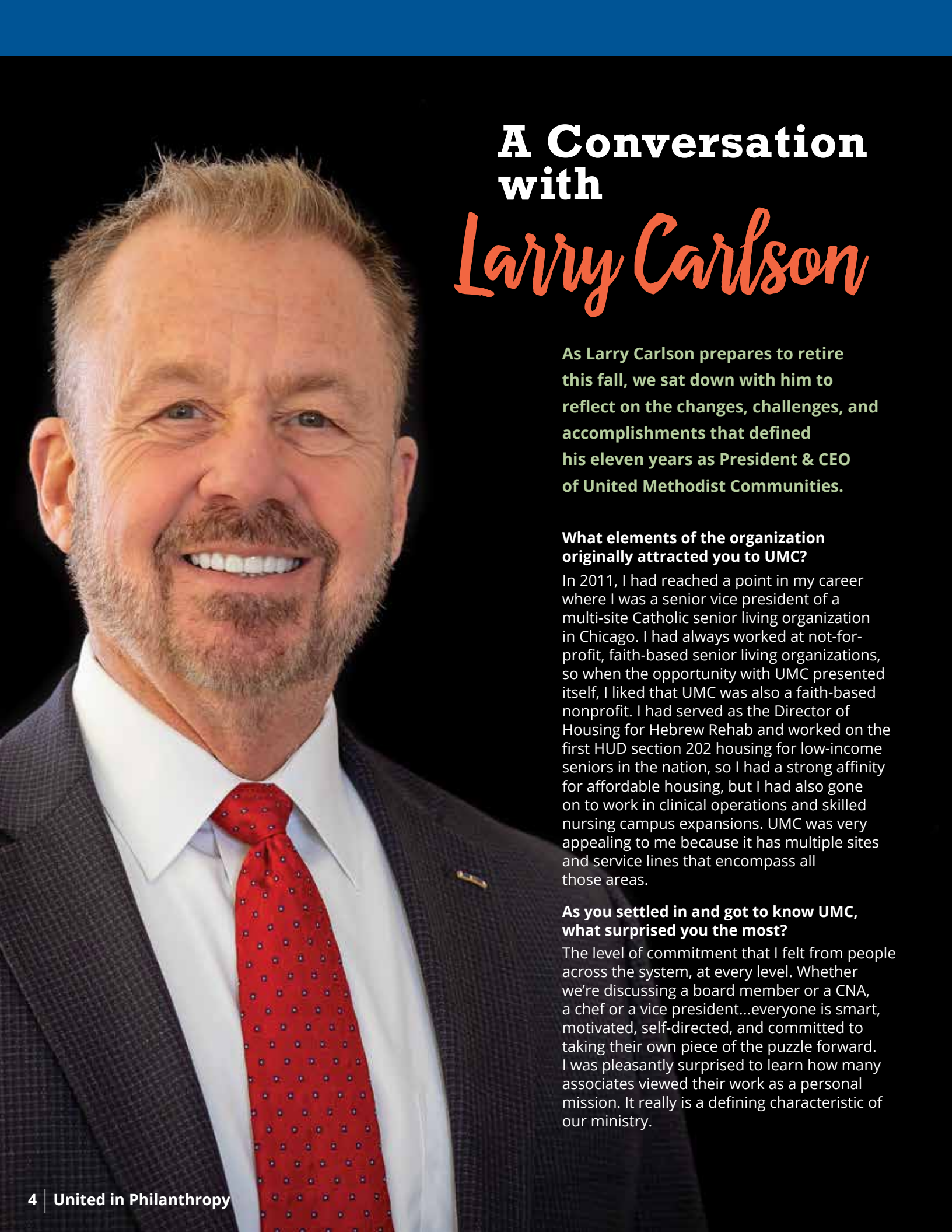
This type of bequest names a charity as a contingent beneficiary in your will or trust in the event one or more of your specific bequests can't be fulfilled.

If (insert name) is not living at the time of my demise, I give and devise to United Methodist Homes of New Jersey Foundation, Inc., the sum of \$ _____ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific community or program).

ESTATE PLAN HELPFUL FACTS

- The UMC Foundation is not qualified to provide specific legal, tax, or investment advice. Please consult with your own legal and financial advisors before making a gift. If you'd like customized language or have an idea for a specific legacy gift, our VP of Philanthropy would be pleased to work with you and your advisor to determine the gift that best suits your situation and interests!

- You may not need to revise your entire will to add UMC to your estate plans. Speak with your attorney about creating a simple, one-page codicil that expresses your wish to support our mission.
- The UMC Foundation's legal name is United Methodist Homes of New Jersey Foundation, Inc. and we do business as United Methodist Communities Foundation.
- The UMC Foundation's federal tax ID # is 22-2720958.



A Conversation with *Larry Carlson*

As Larry Carlson prepares to retire this fall, we sat down with him to reflect on the changes, challenges, and accomplishments that defined his eleven years as President & CEO of United Methodist Communities.

What elements of the organization originally attracted you to UMC?

In 2011, I had reached a point in my career where I was a senior vice president of a multi-site Catholic senior living organization in Chicago. I had always worked at not-for-profit, faith-based senior living organizations, so when the opportunity with UMC presented itself, I liked that UMC was also a faith-based nonprofit. I had served as the Director of Housing for Hebrew Rehab and worked on the first HUD section 202 housing for low-income seniors in the nation, so I had a strong affinity for affordable housing, but I had also gone on to work in clinical operations and skilled nursing campus expansions. UMC was very appealing to me because it has multiple sites and service lines that encompass all those areas.

As you settled in and got to know UMC, what surprised you the most?

The level of commitment that I felt from people across the system, at every level. Whether we're discussing a board member or a CNA, a chef or a vice president...everyone is smart, motivated, self-directed, and committed to taking their own piece of the puzzle forward. I was pleasantly surprised to learn how many associates viewed their work as a personal mission. It really is a defining characteristic of our ministry.

Reflecting on your years as President & CEO, in what areas have UMC grown and transformed the most?

Of course, there's the work we've done to bring mission into all areas of the organization. We've also made our operations much more sophisticated. In the last decade we went from not even having an IT department to becoming early adopters of innovative, cutting-edge products and software and really integrating technology into how we care for our residents. We also strengthened our clinical capabilities, honing our staff's cardio and pulmonary expertise, for example, and leveraging that to develop strong, mutually beneficial partnerships with community hospitals.

The function and activities of UMC's Board of Directors have also transformed during my time as CEO, and I give a lot of credit to Rev. Virginia Samuel Cetuk. Ginny was the board chair when I joined UMC, and her leadership and guidance were instrumental to the board evolving from a fiduciary board who met three times per year to an active, working board that has generative discussions, plans strategically, and asks the right questions to move UMC forward.

What challenge or lesson learned at UMC made you stronger as a leader?

Right off the bat, Superstorm Sandy brought an unexpected, command performance of leadership. Now I'm ending my senior living career with a pandemic, so I've been bookended by unforeseen challenges.

I'd say the one thing that turned out to be most instrumental was the initial strategic planning and learning lab process. We dedicated ourselves to that work and it informed many other initiatives that followed. Everything we learned highlighted the importance of mission integration and embracing our position as a faith-based organization.

What hopes do you have for the future of UMC?

I've always likened my position as CEO to a runner in a relay race. My predecessor handed me the baton in 2011, and I hope that the changes I've made and initiatives I've led have moved UMC forward. As an organization you always want to become better, so now I expect the next generation of leadership will take the baton and bring UMC to the next level. I would love to see the next generation embrace organizational growth, strengthen our entrepreneurship and tech initiatives, and build on our current passion for dementia care.

What are your hopes for the future of senior living as a whole?

The industry needs to move beyond just building buildings. Looking at the next generation, not every senior wants to move to a residential community. As we grow and innovate within our campuses, we also need to develop strategies to help people to live authentic, engaged lives at home.

Do you have a final message you'd like to share with readers?

UMC is in the beginning stages of a special project that could completely transform how people with dementia are cared for in this country. I believe our project will be the biggest sea change in the last 30 years of senior living. We were inspired by a visit to Hogeweyk, a dementia village in the Netherlands. We took what we learned about their model of empowering seniors with dementia to live with a sense of normalcy and independence and combined it with our belief that individuals continue to grow and learn throughout life. Everyone, regardless of cognitive ability, is entitled to feel productive and meaningful.

As our project comes to life and UMC can share more, I know that our families, partners, and supporters will want to come along for the ride.

For now, I encourage anyone touched by dementia or interested in the future of dementia care to check out the new landing page and FAQ on our website, umccommunities.org/avandell.

Thanks, everyone!
Larry

Did You Know...

UMC has a blog with new content every month?

We feature topics of interest for seniors, advice for families considering the move to senior living, spotlights on our residents and associates, and more!

Visit umccommunities.org/blog

Community Wish Lists

New Wishes for a New Fiscal Year

Community Wish Lists offer a tangible way for donors to get involved and make a difference! Thanks to generous family members, friends, and neighbors like you, our communities were able to purchase highly requested items from our Fiscal Year 2022 Wish List like robotic therapy pets, a new smart tv, art therapy supplies, outdoor speakers, and more.

July 1st kicked off our new fiscal year, and with it we have several new Wish List items to highlight. To view the full list on our website, please visit <https://umcommunities.org/foundation/wish-list/> or scan this QR code.



This fall, we'd like to share a few of the items that are currently on the wish lists:

Beekeeping Supplies

Requested for UMC at Bristol Glen

Bristol Glen's residents are eager to expand their community's beekeeping hobby! We all know how important honeybees are to the environment, but beekeeping can also reduce stress and give residents a sense of purpose. Bristol Glen is hoping for donations to expand their hive and purchase additional beekeeping supplies.

Donation Range: \$50 - \$500



SingFit Prime

Requested for all communities

SingFit takes activities to the next level by allowing Community Life and Tapestries associates to easily run regular music therapy programming for residents. When conducted on a regular basis, the sessions can ease stress, boost endorphins, and provide an engaging social activity for memory care residents. Donations toward this item will allow associates to receive training and support on the program, purchase the instruction guides, speakers, music playlists, and access the constantly updated content library.

Donation Range: \$2,000 - \$3,000 per community



Community Life Supplies

Requested for UMC at Collingswood and UMC at The Shores

Creative mediums like painting, drawing, and crafting can be very beneficial for seniors, especially those living with dementia. The Tapestries neighborhoods at Collingswood and The Shores are requesting some assistance in stocking up on supplies to boost resident engagement.

Donation Range: \$50 - \$500

We are asking for earmarked monetary donations, rather than the physical objects to be dropped off, so our associates can secure the right product that exactly fits our residents' needs.



To contribute towards one of the listed items and make a tangible difference, please contact the UMC Foundation at foundation@umcommunities.org or 732-922-9800 and we'd be happy to share more details!

Are you interested in making a difference through associate education? The UMC Foundation needs support for the Associate Enrichment Fund, which assists associates in many ways. In particular, we seek to raise funds for scholarships for HomeWorks home health aides.

UMC was thrilled to have our Tapestries memory care curriculum certified by the Alzheimer's Association. Now we are certifying a new Tapestries at Home program that will allow seniors who choose to remain in their own homes to benefit from our model of care. If you can help us equip home health aides with the skills and knowledge to provide specialized dementia care, please select the Associate Enrichment Fund on our online donation page, <https://umcommunities.org/foundation/donate>, scan the QR code below, or use the enclosed, prepaid envelope to mail a check made out to United Methodist Communities Foundation with Associate Enrichment Fund on the memo line.



Great News

for Charitable Gift Annuities!

As of July 1, 2022, the age-based payment rate for CGAs has gone up!

A charitable gift annuity is a powerful way to receive income, create an immediate, partial income tax deduction, and make a gift to UMC. This is a great opportunity to transfer low-yield or volatile securities in exchange for a higher, fixed, secure retirement income. Additionally, if you use appreciated stock to fund your charitable gift annuity, the value is based on the asset's market value, not your cost basis!

Current Payout Rates

We will be happy to prepare an overview of what your personal charitable gift annuity would look like. You can include another person to receive income as well, though your rates will be lower. All we need is your birthdate and the amount you want to donate.

AGE	Payment
75.....	6.0 %
80.....	7.0 %
85.....	8.1 %
90.....	9.1 %

To learn more about how charitable gift annuities can support our mission of caring for New Jersey's seniors, call **Linda M. Hill, PharmD**, Vice President of Philanthropy at **732-731-2122** or send an email to lhill@umcommunities.org.

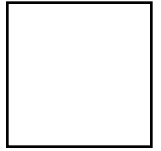




United Methodist
Communities

Foundation

3311 State Route 33
Neptune, NJ 07753
UMCommunities.org



Building
A Legacy

D O N ' T M I S S A M O M E N T !

Stay in Touch

Updating your contact info or requesting removal from our mailing list is easy! To make any changes, please call 732-922-9802 x2121 or email foundation@umcommunities.org.

Connect Online!



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youtube.com/UnitedMethodistCommunities

Ways to Give

Please make all checks payable to United Methodist Communities Foundation and mail to 3311 State Route 33, Neptune, NJ 07753.

Online credit card donations are secure and easy at foundation.umcommunities.org/donate. For assistance, please call 732-922-9802 ext. 2121.

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Save the date!

The Foundation's second virtual event will take place on
Saturday, October 15th at 6pm. For more details
and sponsorship opportunities, please visit
umcommunities.org/foundation/celebrationofgiving
or contact Gary Engelstad directly.