

# The Spirit of CAROL WOODS

SUMMER | FALL 2015







CAROL WOODS



# The Spirit of CAROL WOODS 2015

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## MISSION STATEMENT

Carol Woods shall be a charitable, not-for-profit corporation meeting the needs of older adults for housing, health, well-being, and protection of financial security.

The mission of Carol Woods shall be to provide a safe, healthful, and secure environment for persons throughout their later years, as well as to engage in cooperative research, development, and education in areas encompassed by the mission. High quality residential living and health services shall be provided according to individual needs. Residents' ongoing needs to maintain and promote health and well-being shall be supported through the provision of appropriate resources. Carol Woods shall encourage diversity, residents' leadership, and participation in and service to Carol Woods and the larger community. Carol Woods shall also foster a high quality work experience for staff and facilitate staff development that embodies the values and mission of the organization.

## *Letter from the CEO & Board Chair*

# ENGAGEMENT

## is the foundation of Carol Woods

Our 35th anniversary last fall brought us together to celebrate not only how we have grown over the years, but also how our culture of engagement on and off campus has remained the cornerstone of who we are.

Since the beginning, Carol Woods' residents have actively shaped and guided our community. Such a resident-driven model enables us to create an inviting atmosphere and rich variety of activities that make Carol Woods a special place to call home.

At Carol Woods, residents lead a life of intention with service and outreach to others. Residents engage in projects, plan events, serve on committees, participate in research, support charities, mentor students, share their knowledge, raise awareness, volunteer in not-for-profit organizations, teach classes, advocate for causes, foster change, and work toward improving the lives of others. Residents often share that engaging in acts of service is a fulfilling and inspiring pursuit that not only benefits one side in an exchange, but all involved.



As an organization, Carol Woods is dedicated to the engagement, facilitation and partnership through service that will improve the lives of all older adults. For every person who moves to Carol Woods, there are thousands more that may not be able to consider continuing care communities as a future living option or who are hoping to age in their own home. Carol Woods collaborates with organizations that help many older adults to have choice, support and resources.

We hope you enjoy this year's *Spirit of Carol Woods* and learn about some of the ways residents create the culture of engagement that is the essence of Carol Woods.

*– Pat Sprigg, President & CEO &  
Stephen Elkins-Williams, Board Chair*



# Celebrating 35 Years of CAROL WOODS


*Then and Now*



In the late summer of 1979, Carol Woods opened its doors for the first time to pioneering residents. It was the result of nearly 10 years of vision, planning, and dedication. The grassroots initiative attracted much local interest to create a continuing care retirement community in the Chapel Hill area that would take advantage of its proximity to town, educational, cultural and medical resources.

With continued vision and dedication it is now 35 years later and the Carol Woods community continues to evolve to meet the needs and interests of residents on campus and community members that live just beyond the

split rail fence. In November 2014, residents and staff participated in a weeklong anniversary celebration that began with a festive kick-off reception, followed by special performances, lectures and ended with a celebratory staff dessert recognition event to commemorate the many successes of our community.

Please join us as we reflect back on our experiences over the years and share in the new beginnings the future will bring! 















# Celebrating Creativity Brings Residents Together

**A**rtistic expression is found throughout Carol Woods and residents are finding new ways to share their creative passions with each other.

Recently, resident and artist Patricia Lockwood Davis challenged herself to create a small painting each day for her personal well-being goals. In order to motivate herself, she reached out to other residents and what resulted was “Art Every Day Month” where all residents were encouraged to create art every day for a month.

What began as a personal challenge has since grown into a community-wide movement now known as “Celebrate Creativity.” Every six weeks residents gather for an art-focused reception in celebration of various forms of expression that they have created. These art

celebrations continue to grow and encourage residents to connect to one another on new levels. Exhibitions of pottery, photography, computer graphics, quilts, stone, woodcarvings, jewelry, music, poetry, and collaborations submitted by residents in higher levels of support are all new additions to more traditional watercolor, acrylic and graphite-sketched pieces. “Celebrate Creativity” even welcomes doodles!

A lifelong art enthusiast and 10-year Carol Woods resident, Patricia never considered the impact a small desire to ignite her own creativity and to better use the new art studio space would have on a community of residents.

“Without a doubt, it’s the artists and residents of Carol Woods that have made the ‘challenges’ so much fun and the celebrations so exciting. Their enthusiasm, creativity, interest,



KIM WERFEL



Below, a resident uses one of three pottery wheels in the Krusa Craft Shop to practice ceramic design. Below right, residents use the craft shop for many new interests including woodturning, which is popular for both men and women at Carol Woods.



appreciation, participation, art encouragement, and good humor are what make these events so successful thus far. They are the heart and soul of it all,” Patricia said.

For Nick DeLuca, a resident of Carol Woods for two years and someone who decided to pursue his own artistic expression in his retirement years, joining in on this movement never felt more perfect.

“The medium does not matter, we just want a means to share,” stated DeLuca, co-leader of this art initiative.


In the recently-expanded Krusa Craft Shop, potters and woodworkers are learning, sharing and creating as well.

Woodturning is becoming increasingly popular among both men and women at Carol Woods. The woodturners invited world-class turners to Carol Woods for special instructional programs, and nine residents have visited other area shops to learn new skills. The Craft Shop now has three lathes and a drum sander, in addition

to many other tools, to accommodate this growing interest. Many residents often find that retirement is an opportunity to learn new craft skills among other interests and to enjoy sharing this experience with others while doing so.

“That’s how Carol Woods works,” said Jim Summerville, co-chair of the woodworking group. “Residents form an interest and encourage others.”

On the other side of the Craft Shop, the Carol Woods Potters’ Guild meets regularly in the new studio space which is well-equipped with three wheels, two kilns, a slab roller, a clay extruder and many glazes. There is even donated clay and plenty of guidance for newcomers to try their hand at pottery.

“Pottery is active, social, creative and exciting. For some, working with clay also can be a spiritual experience,” said potter Janie Freeman. “At Carol Woods, there are so many opportunities that you can pick and choose what feeds your soul.” 



A close-up photograph of a field of flowers. In the foreground, several white daisy-like flowers with bright yellow centers are in focus. Behind them, a dense field of yellow flowers is visible, though slightly blurred. The green stems and leaves of the plants are interspersed throughout the scene, creating a vibrant, natural background.

Connecting to the Greater Community:

# RESIDENT VOLUNTEERS



**C**arol Woods residents volunteer and support numerous local community organizations. Such involvement is not a requirement for daily life on-campus, but it is definitely a calling that many bring with them when they move to the community. Residents often describe volunteering as a mutually beneficial experience for all involved. It allows individuals to find a meaningful connection while meeting the direct needs of the greater community. Residents host an annual volunteer fair that encourages those interested in exploring new opportunities to begin ventures in a variety of organizations, with the hope they find a new connection or interest.

Each year residents of Carol Woods volunteer thousands of hours and make donations of various goods and resources through many different organizations both on and off campus. Here are just three examples:

## COMMUNITY COLLECTION DRIVES

Community outreach drives are held on campus throughout the year. Collections of food, personal care items and clothing are given to local organizations such as the Community



House and the Inter-Faith Council's Project Homestart, to support the needs of men, women and children in the greater community. Other drives collect coats and blankets to benefit recipients during the cold winter months and children's books so young readers will have adequate access to literacy materials.

The resident-led Community Relations Committee facilitates the collection drives and donation efforts on behalf of the community. Each year, Carol Woods donates approximately 150 large cartons of food and personal care items. Often, drives consist of items that residents can easily purchase on their own and place in a centralized, convenient collection site on campus. These drives are a great way to make a simple contribution that in turn has a real impact on the greater community.

## MEALS ON WHEELS OF CHAPEL HILL-CARRBORO

The Chapel Hill-Carrboro Meals on Wheels program began operations nearly 40 years ago to improve meal quality and service to local older adults. Resident Jeanne Arnel served as the executive director of the local organization for many years. Her legacy lives on through today's volunteers, many of whom are residents of Carol Woods.

Meals on Wheels serves approximately 130 meals per day that are covered in 12 routes across southern Orange County. Every week, resident volunteers pick-up meals and deliver them along their route to assigned

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See **VOLUNTEERS** page 12

Annually, the residents of Carol Woods participate in the Letter Carriers' "Stamp Out Hunger" Food Drive. Community postal carrier Deryl Copeland and members of the Community Relations Committee collect donated items to support the nation's largest single-day food drive.



## VOLUNTEERS from page 11

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recipients. But, what they are delivering is more than just a meal. They extend their kindness and provide an opportunity for social interaction to those who are primarily homebound and often socially isolated. Just a simple greeting for the day can make all the difference for the program recipients and that very interaction motivates many of our resident volunteers to remain dedicated participants.

## PRISON MISSION

Over the years, residents have participated in a unique program supported by the Orange County Prison Ministry. Resident volunteers tutor

and mentor inmates in a variety of manners. Computer literacy courses, job interview preparations, church services and general conversation are popular among volunteer and inmate interests. Residents understand that they bring a lot to the prison community through their interactions, but at the same time the inmate population teaches our resident volunteers so much more. Many of our residents thrive on the meaningful connections that they make in their experiences at the facility. Resident volunteers encourage and give hope to the men which enlivens a sense of self-purpose and confidence in them. It is not just the inmates, but also the volunteers who experience the positive influence of this type of bond. **cw**

“I volunteer for the relationships with the recipients—not only is this an opportunity to give back to the community but I am able to meet people that I grow to care about and find a genuine interest in getting to know them.”



– Celia Sandford, Meals on Wheels volunteer since 2001

“My work with the inmates is a rewarding experience. They appreciate us coming in to work with them, what we teach them, and just having a presence there with them. There is personally a lot of immediate payback for my volunteer time with the prison ministry.”



– Paul Munk, Orange County Prison Ministry volunteer since 2009

“I started volunteering as a substitute driver. It was a simple role I could play to get me more involved in the community. Along the way I have met new people and know that I am making a difference.”



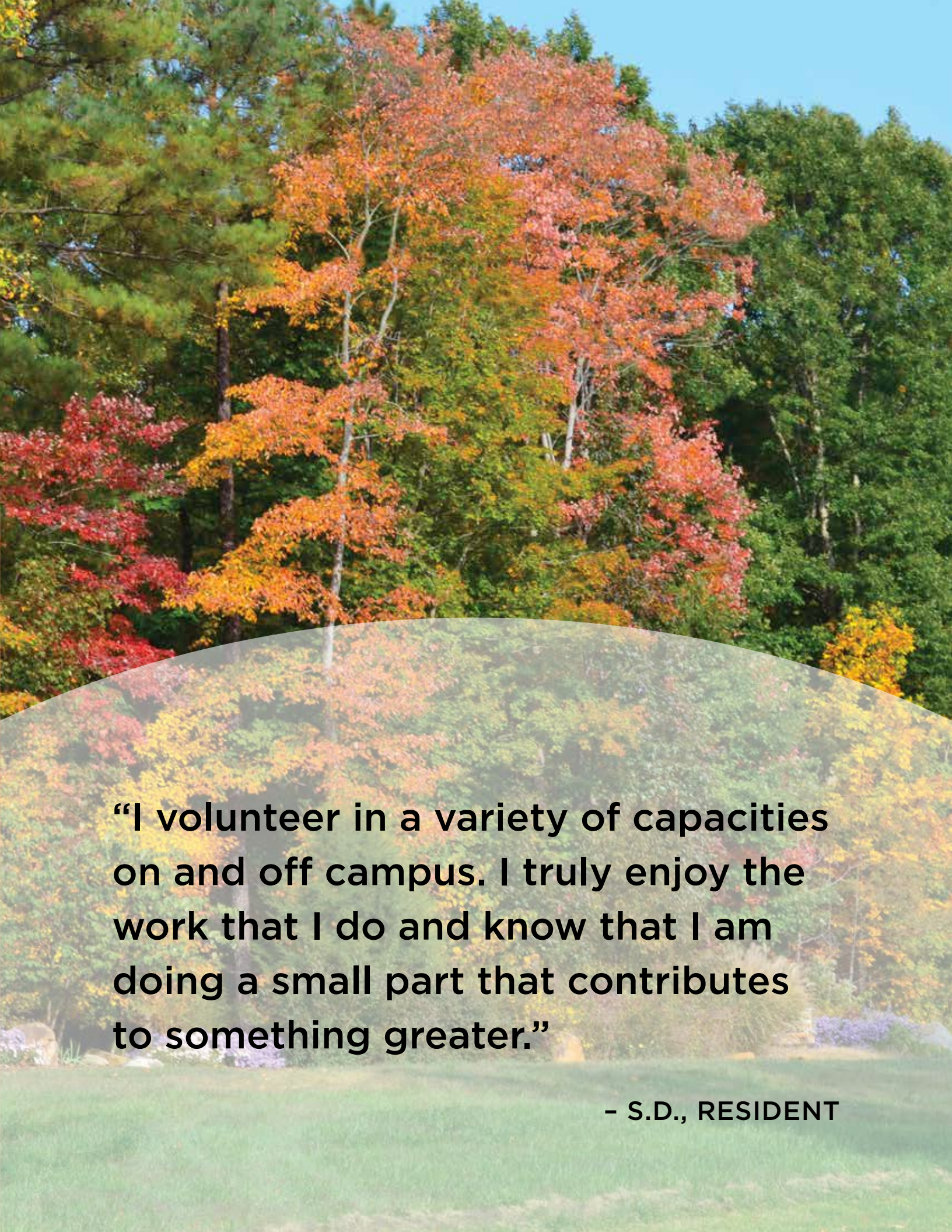
– Don Reinfurt, Meals on Wheels volunteer since 2003

“There is a need everywhere—whatever someone is willing to donate, we are able to find a demand for it. For me, giving is a no-brainer and I am very fortunate to reside in a retirement community that gives so much back to the greater area.”



– Nancy Gustaveson, Community Relations Committee co-chair and community volunteer





**“I volunteer in a variety of capacities on and off campus. I truly enjoy the work that I do and know that I am doing a small part that contributes to something greater.”**

**- S.D., RESIDENT**



# Focal Point: COMPLEMENTARY THERAPIES

Carol Woods' approach to well-being is holistic, proactive and collaborative, integrating a broad array of traditional and emerging modalities and interventions tailored to the unique needs of each person. Many residents participate in on-site complementary therapy services to support general health and well-being. Additional benefits of such services encourage residents to understand that changes over time in balance, posture, and healing processes vary and that there are a variety of ways to adapt to each new challenge. Many innovative complementary therapy resources are utilized as preventative care for future medical needs. The Carol Woods community offers the following complementary therapies in addition to conventional medical therapies:



Carol Woods offers instructor-led programming, like yoga, to meet a variety of complementary therapy needs.

## HEALING TOUCH

Placing hands on or just slightly above the body, a certified practitioner assesses and manipulates a person's unique energy field. The practitioner is then able to rebalance energy flow throughout the entire body to address pain, anxiety, depression, insomnia and other aspects of well-being.

## MASSAGE

A licensed massage therapist practices the various techniques of touch to stimulate nerve endings and pressure points throughout the body. Massage is most notably used to relieve muscle tension, stress, and anxiety and promote relaxation across the entire body or in specific areas.

## AWARENESS THROUGH MOVEMENT


Commonly misunderstood as an exercise class, Awareness Through Movement or Feldenkrais are participatory teachings that discuss

physical body awareness designed to improve posture, flexibility and coordination. Additional techniques designed to address natural pain and tension management transitions over time are also practiced.

## TAI CHI

Practiced as a non-combative, low-impact form of martial arts, it is the use of controlled breathing paired with slow moving actions that are physically and mentally calming. This art form is designed to quiet the body, mind and soul and promote self-healing.

## YOGA

This gentle exercise is offered in many forms at Carol Woods. Attention to body posture and breathing techniques are pillars of this therapy type. The versatility of yoga allows it to be modified to meet physical, emotional and spiritual needs of residents as they transition through the various levels of support. 



# Spotlight

## ON STAFF LONGEVITY


The Resident Association recognized and honored six original staff members as they celebrated 35 years of service with Carol Woods in the November meeting: Ed Peppers, Cecelia Bynum, Merry Chestnut, Johnnie Sharpe, and Jessie Pettiford. Not pictured: Don Potter.



The year 2014 ushered in a great milestone for the Carol Woods community as we celebrated 35 years of making a difference. For these 35 years, six of our staff were hired as some of the community's first employees. These staff members represent various areas of service from across the organization. During their tenure, they have witnessed first-hand the evolution from the early days of Carol Woods in the late 1970s and early 1980s into the leading retirement community that it is today. Their longevity in their positions is invaluable because each staff member continues to create long-lasting relationships with residents and their families, watching them grow over time. Longevity within this community is a testament to the strength and dedication of the workforce to the community and the very same that is

reciprocated by the community residents. The average length of staff service at Carol Woods is an outstanding nine years, with 12% of employees who have worked 20 years or more.

We are very grateful for the history each staff person carries with them and we use these experiences to guide the future of the Carol Woods workforce.

*Carol Woods is known for its attentiveness as a long-standing, family-friendly employer that maintains its commitment to providing market competitive wages and comparable benefits to include health insurance, paid time off, life insurance, and educational assistance programs. Employees also benefit from use of the Carol Woods' McClamroch Library, Employee Café and Fitness & Aquatics complex.* 









# ANNUAL REPORT

# 2014

## Financial Highlights

- In 2014, Carol Woods had 32 new residents move to campus.
- In 2014, 38 people became residents under Carol Woods' Early Acceptance program.
- In March 2014 S&P again reviewed Carol Woods' financial position and future plans and affirmed its "A-rating with Stable Outlook." According to the 2013 annual report that S&P publishes, Carol Woods is one of only seven continuing care retirement communities that carry a S&P rating of "A" or higher.
- In 2012, Carol Woods borrowed \$22 million in tax-exempt bonds issued by the North Carolina Medical Care Commission. The bonds are being drawn down to pay for the cost of the new buildings and furnishings of the 2012-2014 Campus Enhancement as well as other routine capital improvements. As of December 31, 2014, \$21,717,670 of the bonds had been drawn, leaving a balance of \$282,330 yet to draw in 2015.
- In addition to the bonds, Carol Woods raised \$575,000 in charitable donations that also are to be used for the Campus Enhancement project. As of December 31, 2014, \$558,000 of those gifts had been applied, leaving a balance of \$17,000 to be applied in 2015.
- In 2014, Carol Woods raised \$170,717 in charitable gifts to pay for the refurbishment of Building 8 for use by Charles House in 2015. This will bring a quality senior adult day program to campus, available for Carol Woods residents as well as the greater community.
- Carol Woods avoided withdrawing any funds from its long-term investment portfolio in 2014, which was valued at \$56,057,259 as of December 31, 2014.

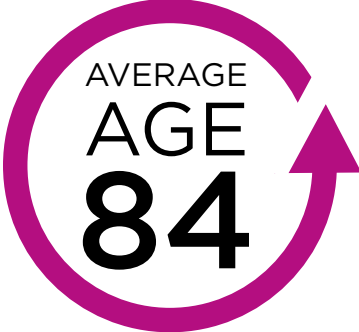


# CAROL WOODS BY THE NUMBERS

(2014 Year-End Statistics)

## *On-Campus Residents*

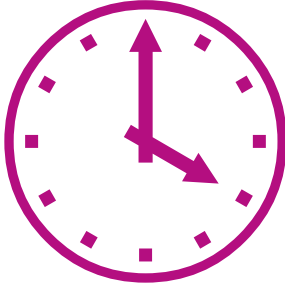
POPULATION **485**



AVERAGE  
AGE  
**84**



AGE RANGE  
**60-105**



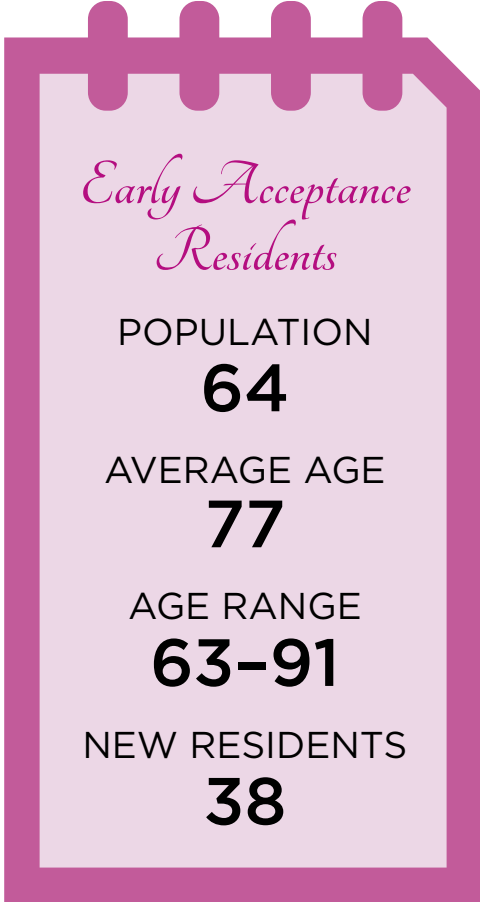
THE LONGEST  
OCCUPANCY AT  
CAROL WOODS  
IN 2014:

**28 YEARS**

**32**  
NEW  
RESIDENTS



WELCOME  
NEWCOMERS



*Early Acceptance  
Residents*

POPULATION  
**64**

AVERAGE AGE  
**77**

AGE RANGE  
**63-91**

NEW RESIDENTS  
**38**



Carol Woods Life Enrichment department awarded the 2014 Orange County Long-Term Care Quality Service Award.

## RECOGNITIONS AND DESIGNATIONS

The efforts of the Board, residents and staff come together for the enrichment of those in and outside of the Carol Woods community and are reflected in the recognitions and special designations awarded to the community:

- In May of 2014, Standard & Poor's (S&P) reaffirmed Carol Woods' credit rating of "A, with a Stable Outlook" for a 13th year in a row. Financial, occupancy and marketing information is reported and assessed to achieve this designation.
- Carol Woods was again awarded the Occupational Safety and Health Administration's (OSHA) Safety & Health Achievement Recognition Program (SHARP) designation for its dedication to providing a safe and healthy work environment for its employees. The SHARP Award recognizes companies for its commitment to safety and health of their employees. Companies that qualify for the award show that they have developed and maintained exemplary safety programs for workers.
- Each year, Carol Woods undergoes an unannounced survey by the federal or state Department of Health Service Regulations. As a participating member of federal and state Medicare programs, Carol Woods maintains its Medicare certification to allow residents and others in the greater community the opportunity to use their Medicare benefits for short-term rehab needs. All evaluations were completed with excellence and Carol Woods received deficiency-free status another year in a row.
- Carol Woods was awarded the "2014 Orange County Long-Term Care Quality Service Award" for establishing a program that engages residents from all levels of service through meaningful activity that gives back to the greater community. Volunteer initiatives were created by the Life Enrichment team to plan and facilitate resident and staff members in a variety of activities.
- US News & World Report rated the Health Center at Carol Woods a 5-star overall rating under the "Best Nursing Home" category in its 2014 published reports.
- Indy Week, a popular cultural weekly publication, calculated its polling results and named Carol Woods the "2014 Best of the Triangle: Best Retirement Community" for a second year in a row. Thousands of triangle residents are polled across a variety of categories to include businesses, food, entertainment, and other services that are making an impact in the triangle area.



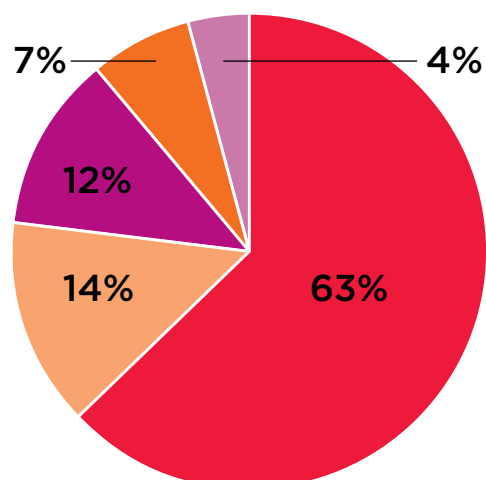
# Financial Status at a Glance

## Income Statement

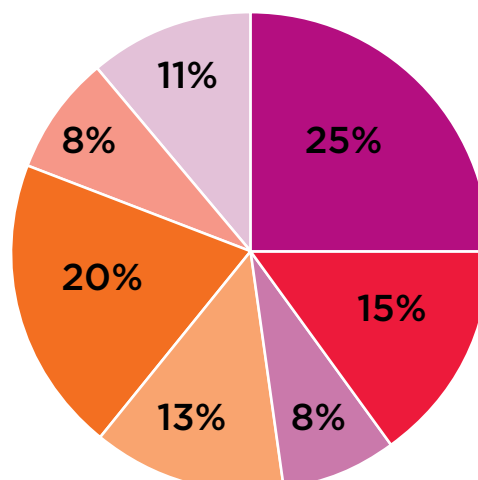
### Operating Revenue

	2014		2013	
■ Monthly Service Fees	16,571,843	63 %	15,092,172	63 %
■ Amortized Entry Fees	3,623,387	14 %	3,108,658	13 %
■ Net Health Services	3,090,966	12 %	2,853,820	12 %
■ Investment Interest & Dividends	1,920,318	7 %	1,490,798	6 %
■ Miscellaneous Revenue	990,843	4 %	1,311,685	6 %
<b>TOTAL OPERATING REVENUE</b>	<b>\$26,197,357</b>	<b>100 %</b>	<b>\$23,857,133</b>	<b>100 %</b>

2014 Operating Revenue



2014 Expenses



### Expenses

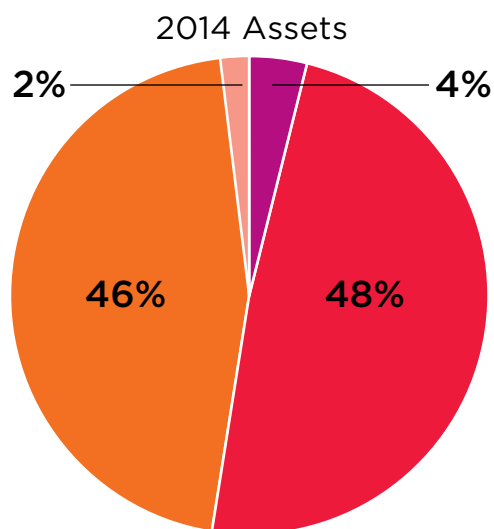
	2014		2013	
■ Health Services	6,433,923	25 %	6,218,930	26 %
■ Dining Services	3,778,902	15 %	3,647,294	15 %
■ Housekeeping / Security / Transportation	2,124,235	8 %	2,124,235	9 %
■ Maintenance of Facilities / Grounds	3,243,405	13 %	2,788,444	12 %
■ Administration / Giving / Other	4,946,732	20 %	5,285,064	22 %
■ Long-Term Debt	2,053,972	8 %	1,359,045	6 %
■ Depreciation	2,743,743	11 %	2,409,576	10 %
<b>TOTAL EXPENSES</b>	<b>\$25,324,912</b>	<b>100 %</b>	<b>\$23,832,588</b>	<b>100 %</b>
<b>TOTAL NET REVENUE</b>	<b>\$872,445</b>		<b>\$24,545</b>	

# Balance Sheet

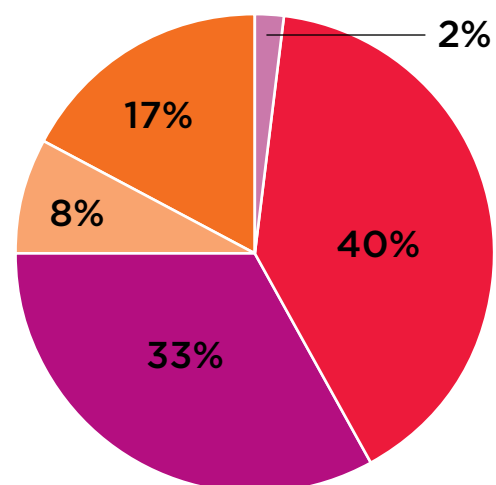
## Assets

- Current Assets
- Long Term Investments
- Net Property & Equipment
- Other Assets

	12/31/14		12/31/13	
Current Assets	6,112,745	4%	4,965,162	4%
Long Term Investments	56,188,742	48%	52,928,971	48%
Net Property & Equipment	54,428,616	46%	51,672,318	47%
Other Assets	673,063	2%	712,554	1%
<b>TOTAL ASSETS</b>	<b>\$117,403,166</b>	<b>100%</b>	<b>\$110,279,005</b>	<b>100%</b>



## 2014 Liabilities and Net Assets




## Liabilities and Net Assets

- Current Liabilities
- Long Term Debt
- Entry Fees not yet Amortized
- Other Long Term Liabilities
- Net Assets

	12/31/14		12/31/13	
Current Liabilities	2,098,956	2%	2,279,601	2%
Long Term Debt	47,487,670	40%	44,227,801	40%
Entry Fees not yet Amortized	39,014,348	33%	37,370,027	34%
Other Long Term Liabilities	9,058,885	8%	6,946,162	6%
Net Assets	19,743,307	17%	19,455,414	18%
<b>TOTAL LIABILITIES AND ASSETS</b>	<b>\$117,403,166</b>	<b>100%</b>	<b>\$110,279,005</b>	<b>100%</b>





**“I am impressed with the Carol Woods Board’s focus on strategic planning to make sure that this wonderful community continues to be a great place to live and work and also to ensure that Carol Woods has a positive impact for older adults in the broader community.”**

**- E. C., RESIDENT AND BOARD MEMBER**



# Board of Directors

The Carol Woods Board of Directors includes 16 members selected from and broadly representative of the larger Chapel Hill community, four Carol Woods residents, and the Carol Woods president/CEO. They meet regularly and are responsible for strategic planning and oversight of Carol Woods. They provide direction to management and receive input from residents. They work to ensure Carol Woods retains its position as a leader in continuing care retirement communities and as a desirable place for present and future residents to live.



Standing from left: **Henry Woodward** (resident), **Brenda Jamerson**, **Gordon Whitaker** (resident, ex-officio), **Sandy Venegoni** (resident), **Larry McManus**, **Marlene Rifkin**, **Steve Lackey** (secretary), **Mary Beck**, **Jack Evans**, and **Tom Haber**.

Sitting from left: **Chris Barnes**, (treasurer), **Eva Pearce Clontz** (resident, ex-officio ), **Pattie Moore-Boyette**, **Bob Dunham**, **Pat Sprigg** (Carol Woods president and CEO), **Stephen Elkins-Williams** (Board chair), **Kelly Ross**, **Barbara Jessie-Black** (Board vice-chair), and **Dina Mills**.

Not pictured: **Rob Bruce**.

# New Board Members

Carol Woods welcomed five new board members in 2015:



**THOMAS (TOM) R. HABER:** Tom received a B.S. in economics from the Wharton School at the University of Pennsylvania (1962). He is CEO of Hadley Investments. Tom retired from his position as senior vice president/chief

financial officer of GlaxoSmithKline U.S., and is currently on the board of directors of the GSK NC Foundation. Tom previously worked in financial management at Johnson & Johnson. He serves on the board of directors of SECU (State Employees' Credit Union) Family House, Board of Visitors UNC Children's Hospital, and Board of Visitors UNC Kenan-Flagler Business School (Emeritus). His previous volunteer activities include UNC-Chapel Hill Board of Visitors, Chapel Hill-Carrboro Public School Foundation Board, The ArtsCenter Board, and Chapel Hill Preservation Society Board. Tom and his wife Margie have lived in Chapel Hill since 1983.



**DINA MILLS:** Dina received a MBA from the University of Chicago. Dina is an associate director in the Center for Entrepreneurial Studies at UNC's Kenan-Flagler Business School where she manages "Launch Chapel Hill" and

oversees the 1789 Venture Lab and the Adams Apprenticeship Program. She has over 25 years of experience developing and managing

for-profit and not-for-profit entrepreneurial ventures in a wide range of industries across three continents. She served as a Peace Corps volunteer in Rwanda and spent nine years in Poland launching business ventures including British Petroleum, Blockbuster and Insty Prints. Dina retired to Chapel Hill in 2001. The entrepreneurial bug bit again and in 2008 she co-founded LunaPops, a gourmet frozen pop producer, stepping out of the business in 2012. She has four children (13-year-old triplets and a 12-year-old) and currently serves on the Board of the Friends of Downtown.



**PATRICIA (PATTIE) MOORE-BOYETTE:** Pattie received a B.S. in applied mathematics from North Carolina State University (1973), MBA from Meredith College (1983), and became a certified public accountant (1978). Pattie has

worked at UNC Health Care System for the past 30 years, beginning as the director of internal audit for NC Memorial Hospital, next as the vice president of audit and reimbursement for UNC Hospitals, and currently as the vice president of reimbursement for UNC Health Care System. Previous to that, Pattie spent eight years at Blue Cross and Blue Shield of NC (NC fiscal intermediary for Medicare and Medicaid) as an auditor and then audit supervisor for teaching and state facilities. She also helps with accounting-auditing in the family business — Joe Moore & Company, Inc., an industrial boiler contractor located in Raleigh. She serves on the vestry at Saint Michael's Episcopal Church in Raleigh and has taught Sunday school to three-year-olds for more than 35 years.





**MARLENE RIFKIN:** Marlene received a B.S. from Ohio State University and a M.S. in management from Florida International University. Marlene has worked at a number of academic medical centers, including her current position

at UNC Health Care System as senior vice president of operations where she has oversight responsibility for oncology, heart and vascular, GI procedures, urology, neurosciences service lines, radiology, McLendon Labs, environmental health and safety, epidemiology-infection control, emergency preparedness and disaster management-continuity planning. She grew up in East Liverpool, Ohio. After graduate school, she was selected as an Administrative Fellow by Jackson Memorial Hospital-University of Miami where she completed two fellowships — a management fellowship in 1991 and the Senior Policy Fellowship in Community Health Service in 1994. She has served on numerous boards, including UNC Ambulatory Care Board, Ronald McDonald House of Chapel Hill, Family Violence Prevention Center of Orange County, and The Public Health Trust of Dade County. She also served on the Chapel Hill 2020 Planning Group in 2013. Marlene moved to Chapel Hill in 1993. She has three children and three grandchildren in Chapel Hill and Indianapolis, IN.



**GORDON P. WHITAKER** (Resident, Ex-Officio): Gordon received a B.A. from Cornell College (1965) and Ph.D. in political science from Indiana University at Bloomington (1972).

Gordon retired as professor emeritus from the School of Government at UNC-Chapel Hill in 2012, having served on the faculty of the Department of Political Science and the Institute of Government at UNC-CH since 1973. He is a native of Bloomington, IN. Following graduation from Cornell College, he served briefly with the U.S. Public Health Service in Chicago and the Peace Corps in Somalia. After completing graduate studies, he was an assistant professor at Brooklyn College of the City University of New York (1971–1973). He and his spouse, Bob Hellwig, lived in Durham from 1973 until moving to Carol Woods in 2009. He remains an active member of Durham’s Watts Street Baptist Church. He has also been active in community organizations, including the ACLU and Durham Congregations in Action.



## Social Accountability:

# A COMMUNITY OF VOLUNTEERS

The spirit of giving is pervasive among the residents and staff of the Carol Woods community. Both groups generously volunteer their time, funds and other resources for the enrichment of others on and off-campus, especially in the interest of meeting the needs of and advancing best practices for older adults. From in-kind benefits, to gifts to the town, county, schools and other area community organizations, as well as resident and employee assistance, Carol Woods donated more than \$1.2 million to on-campus and greater communities combined.

### SUPPORTING LOCAL GOVERNMENT AND SCHOOLS

In 2014, Carol Woods donated \$307,400 to the Town of Chapel Hill, Orange County and the Chapel Hill-Carrboro City Schools. The Orange County commissioners and town of Chapel Hill leaders utilized funding to continue to support ongoing efforts of senior programming and outreach initiatives in the immediate area. While the Chapel Hill-Carrboro City Schools utilized funding to support school projects, tutoring initiatives, equipment and books for students in kindergarten to grade 12.

More than financial support, residents have donated their time to mentoring and assisting students of all ages. In 2014, the Chapel Hill-Carrboro school system reported 1,300 volunteers that committed over 33,000 hours

during the school year and 17 of those school volunteers were Carol Woods residents. Carol Woods' proximity to area elementary, middle and high schools enables residents to serve as volunteers assisting school-aged children in their many educational pursuits.

### COMMUNITY NON-PROFITS

Donated services, items and in-kind gifts were commendable in 2014 as Carol Woods donated approximately \$286,450 to other area non-profits by way of gifts and donations of senior management time towards projects. Carol Woods' philanthropy focuses on assisting other non-profits that share in similar values and emphasis to impact the lives of older adults.

Carol Woods also provided in-kind facility and campus use, with a monetary equivalent of \$142,036, to local groups and county



organizations for varying purposes over the course of the year.


Additionally, Carol Woods staff members were responsible for contributing numerous hours in socially accountable pursuits that included time teaching students and providing professional support for other local organizations.

## RESIDENT VOLUNTEER INITIATIVES

Residents annually support a variety of community organizations with their time and through collection drives. Compiled by the resident-supported Community Relations Committee, the Triennium Report states that residents have donated more than 12,000 hours to more than 79 organizations in the greater community at last report. Community drives for books, food, clothing, and personal items, and community-involved initiatives in tandem with local churches, the literacy council, and service organizations name only a few of the widespread, ongoing volunteer efforts coordinated and supported by the residents of Carol Woods.

## SUPPORTING RESIDENTS AND STAFF

In 2014, Carol Woods provided charitable care and monetary support through the Carol Woods Charitable Fund Resident Assistance program in the amount of \$223,023. This funding supports residents that experience financial difficulty through no fault of their own or who outlive their assets.

Additionally, staff members were awarded \$3,615 in employee assistance for staff development opportunities that they pursued throughout the course of the year. 

## Partial Listing of 2014 Community Support

Carolina Villages

Central Orange Senior Center

Chapel Hill-Carrboro City Schools

Chapel Hill-Carrboro Meals on Wheels

Community Home Trust Fund

Durham Rescue Mission

Friends of Residents in Long Term Care

Guiding Lights

Institute on Aging

Inter-Faith Council for Social Service

NC Symphony

Orange County Government

Orange County Department on Aging

PlayMakers Repertory Company

Robert and Pearl Seymour Senior Center

Town of Chapel Hill

UNC Geriatrics

UNC Gillings School of Global Public Health

UNC Mobile Student Health Coalition

UNC Public Television

# THE CAROL WOODS CHARITABLE FUND: Generosity Supports Charles House Move

**T**he Carol Woods Charitable Fund supports the achievement of visionary goals established by the Carol Woods community. One aspect of the Charitable Fund, the Community Mission Development Fund, specifically raises money to benefit research in the field of aging and improve housing and services for older adults living in the greater community. In 2014, gifts made to this fund were collected to aid in the organizational growth of the Charles House Association in an effort to relocate their eldercare program to the Carol Woods campus.

Charles House Association, also referred to as “Charles House,” is an organization that

provides support and respite to families caring for aging loved ones. Since 1990, the Charles House has operated a daytime eldercare center in Carrboro. Through interactive programming in a stimulating environment, participants enjoy social interactions, relationship building and a sense of belonging.

In the late summer of 2015, Charles House will relocate its eldercare day program to Building 8 on the Carol Woods campus, allowing the program to increase the number of participants from 22 to 35 a day. There will be space to support the organization’s expanded administrative operations and the new venue will provide the perfect setting to accommodate the instructional needs of students with an interest in the field of aging who are training at Charles House. As an added benefit, Carol Woods residents will also be able to participate in Charles House programming.

Residents and outside donors generously gifted \$170,700 toward the Charles House/ Building 8 renovation campaign. For some, the decision to support the Charles House was personal as they have used the services for their own loved ones. Both Carol Woods and Charles House look forward to the many collaborative efforts ahead and being able to better serve more members of the greater community.

The community, both on and off campus, has benefited greatly through the years from the generosity of those who have contributed to the Carol Woods Charitable Fund, Inc. The fund is a separate 501 (c) (3) tax-exempt

## CHARITABLE FUND BOARD OF DIRECTORS

**James L. Copeland**, Chair

**Robert G. Bruce, Jr.**, Carol Woods Board member

**Dorothy Heninger**, Vice President and Resident

**Brenda Jamerson**, Carol Woods Board Member

**Ken Reeb, Jr.**, Treasurer and Carol Woods

Vice President of Finance & Planning and CFO

**Patricia E. Sprigg**, Carol Woods President

& CEO

**Sandra Venegoni**, Resident





Left, a construction team worked to transform the building to support the operations of the Charles House organization.


Below, the former Carol Woods Children's Center will serve as the new home of the Charles House organization, an adult day program, beginning late summer 2015.



organization and all donations are tax-deductible. In 2006, the Charitable Fund was established by the Carol Woods Board of Directors and it allows donors to designate a particular fund with which they would like their contributions to be used in the organization's efforts to improve the lives of all older adults on campus and beyond. The preference funds include:

- **Resident Assistance Fund:** Gifts provide financial assistance to residents who outlive their assets or experience financial difficulties beyond their control.
- **Resident Life Fund:** Gifts help support resident-run committees that significantly contribute to the overall quality of life at Carol Woods.
- **Campus Fund:** Gifts improve Carol Woods' gardens, trees, and other elements of our campus. Support for major enhancements to existing buildings, furnishings and fixtures, and for new facilities as needed.
- **Employee Development Fund:** Gifts show appreciation and support for employees through helping with the cost of tuition, life enrichment and professional development.
- **Community Mission Development Fund:** Gifts support Carol Woods' initiatives towards encouraging research in the field of aging and improving housing and services for seniors living beyond our campus.

Bricks engraved with your name or the name of a loved one are available for \$300 and will be placed near the entrance to the main building.

If you would like to support Carol Woods' mission through charitable giving, please contact the Finance & Accounting Department at (919) 918-3317 or via email at [kreeb@carolwoods.org](mailto:kreeb@carolwoods.org) to learn more about contributions, gifts of stock and estate planning. 

The Carol Woods Retirement Community graciously appreciates contributions made by members and friends of the community to the Carol Woods Charitable Fund. Gifts directly impact the organization's mission and vision in meeting the needs of older adults.

## CAROL WOODS CHARITABLE FUND DONORS

Theodore & Effie Anderson  
 Anonymous  
 Lottie Applewhite  
 Anthony & Joan Asplin  
 A. Napier & Charla Baker  
 Bradley & Cindy Barker  
 Ruth Barnes  
 Mondell & Mary Jane Beach  
 Jack & Louise Behrman  
 Judith Bellin  
 Jerome & Rosalie Beloff  
 Wayne Benson & Arlene Taylor  
 Winifred Berg  
 Catherine Bergel  
 Jane Berryman  
 Cheryl Billingsley  
 Philip & Mary Blank  
 Richard Blankenship  
 Audrey Booth  
 M. Blair Bowers  
 Nancy Boye  
 Grace Brashear  
 Richard & Robin Brice  
 Helen Brinich  
 Robert & Eleanor Broadus  
 Jane Comfort Brown  
 Catherine Jane Bruce  
 Syliva Buchholz  
 Richard & Lewis Busch  
 Janet F. Campbell  
 Carol Woods Gift Shop  
 Clara Cazzulino  
 Chapel Hill-Carrboro Sunrise Rotary  
 Carla Chamblee  
 Neal & Nancy Cheek  
 Blanche Clark  
 Kyle & Paula Clements  
 Richard & Virginia Clifford  
 Joseph & Eva Clontz  
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 Jeanette Eddy  
 Marion Effron  
 Episcopal Church of the Advocate  
 Estate of Betha Wade  
 Richard & Miriam Fahrer  
 Gabrielle Falk  
 Jeanette Falk

Rosmarie Faust  
 Frank & Patricia Fischer  
 Gordon Fisher & Sarah Price  
 Bettie Flash  
 Jaroslav & Linda Folda  
 Elisabeth J. Fox  
 Seymour Freed  
 Barry & Janie Freeman  
 Maeda Galinsky  
 Nancy Fife Gibson  
 Lucile J. Gilchrist  
 Carol B. Gilliland  
 Richard & Florence Glasser  
 Ann Glassman  
 David & Lallie Godschalk  
 Harry Gooder & Sally Vilas  
 Roger & Nancy Gorham  
 Patricia Grandstaff  
 Judy Grissom  
 William & Gwendolyn Griswold  
 Edward Gross  
 Margaret Gulley  
 Jon & Miriam Haebig  
 I.R. Stirling & Sara Haig





Below, residents celebrate Kentucky Derby festivities in their original derby hat designs.



Lelia Hamilton  
 Nellie Hanse  
 Maureen Harris  
 Mary Wadleigh Harrison  
 Edith Haubrichs  
 John Hawkins  
 Marcia Hellerman  
 Dorothy Heninger  
 John & Marlene Heslip  
 Charles & Anne Heuer  
 Elizabeth Hewitt  
 Sara Hill  
 Lois Ann Hobbs  
 Carol Hogue  
 Donald & Eleanor Holloway  
 Mary Ann Hoover  
 George & Jean Houston  
 John & Martha Hsu  
 Paul & Sylvia Hubbard  
 Julia Jewett  
 Carol Anne Johnson  
 Mary Johnson  
 Rachel P. Johnson  
 David & Nancy Jones  
 Kenneth & Jean Joseph  
 Bert & Ellen Kaplan  
 Bernie & Margaret Kemper  
 Ann Kendall  
 Eleanor Kinnaird  
 Barbara Koch  
 Paul & Patricia Kropp  
 Hans Krusa  
 Ivan & Annie Lakos  
 Elizabeth LaVine  
 John & Shirley Lawhorn  
 Richard Ledyard  
 Philip & Nancy Leinbach

Doris Leonard  
 Roy Lindahl & Marion Stephenson  
 Dot Lineberger  
 Joe & Beth Lineberry  
 Charles D. Liner & Joan Tulloch  
 Bert & Mary Lou Liverance  
 Rosamond Lloyd  
 Larry Loeser  
 Sonna Loewenthal  
 Erica Lorch  
 Jessie Lutz  
 Stella Lyons  
 Ann Mack  
 Jeanne Madigan  
 Walt & Margaret Mangler  
 Ann Markowitch & Ann Seng

Annette Marsland  
 Barclay & Nancy Martin  
 C. Steve & Martha Mason  
 Margaret Mays  
 Roland & Elizabeth McClamroch  
 Zell & Rosalind McGee  
 Cathie McIntyre  
 Jessie McIntyre  
 Ross & Margaret McKinney  
 Gail McKinnis  
 Curtis McLaughlin & Barbara  
 Nettles-Carlson  
 Ann Merzbacher  
 Mary Louise Meyer  
 Terry Miles  
 John & Jane Monroe  
 Pat & Marty Moore  
 C.L. & Nell Morton  
 Anne Moughon  
 Jai & Gisela Nayar  
 Paul & Barbara Nettesheim  
 Oliver Orr  
 Doyle & Ann Pace  
 Charles & Janet Paddock  
 Lucia Pap,  
 Alsey C. Parker Jr.  
 Byron & Dolores Parry  
 Jane Pease  
 Penick Village  
 Stephen Perrin & Cecelia Sandford  
 Richard Pfaff  
 Richard Prust  
 Charlotte Rankow  
 John & Lucia Rather  
 Kenneth & Mary Reeb



Above, the croquet group meets regularly and even hosts the Orange County Senior Games.

Philip & Margaret Rees  
 Donald & Karen Reinfurt  
 William & Jennie Rhodes  
 Margaret Rider  
 Raymond & Shirley Ritchie  
 Stuart Rosenfeld & Mary Eldridge  
 John & Ann Sanders  
 Frederic & Amy Schroeder II  
 Frederic & Susan Schroeder Jr.  
 Christoph E. Schweitzer  
 Robert Seymour  
 Joel & Norma Shapiro  
 David & Jacqueline Sices  
 Donald & Elizabeth Sievertson  
 Caroline Sikorsky  
 Richard Silva  
 Jane C. Simpson  
 Barbara Sirvis  
 Margaret Sirvis  
 Sally Slack  
 Lawrence & Miriam Slifkin  
 Judith Smallwood  
 Otty Snyder  
 Clarence & Phyllis Sockwell  
 Patricia Sprigg  
 Arthur St. John  
 Adam & Jane Stein  
 Ruth Carole Stevens  
 Margaret Taylor

Daniel & Linda Textoris  
 Lele Tison  
 Triangle Community Foundation  
 Evelyn Tuck  
 Mary Ellen Turner  
 Virginia Ullman  
 Gilda Varrati  
 Sue Vause  
 Sandra Venegoni & Amie Modigh  
 Dalys Vogel  
 George Waldo  
 Nellie Waltner  
 Shou-Ling Wang  
 Wes & Betsy Ward  
 Harriet Warner  
 Rebecca Warren  
 Robert & Rita Weimer  
 Charles Weiss  
 Edith Welch  
 Martha West  
 Helen Whaley  
 Elizabeth Wheeler  
 Gordon Whitaker & Bob Hellwig  
 John Whitfield  
 Sheldon & Edith Wiggins  
 James & Melinda Wilde  
 Carolyn Williams  
 Louise Williams  
 Barbara Williamson



William & Katherine Wilson  
 Ann Witherspoon  
 Dick & Ann Wood  
 Lewis & Ann Woodham  
 Henry & Sandra Woodward  
 John & Andree Woosley  
 Katherine Zarker  
 Charles & Nancy Zimmerli



The on-campus indoor swimming pool is the perfect setting to host the resident and friends summer pool competition.





## ABOUT CAROL WOODS

Situated on 120 wooded acres in Chapel Hill, Carol Woods is an accredited not-for-profit continuing care retirement community. It is an inclusive community that promotes an active lifestyle supported by the area's educational, cultural and medical resources. A commitment to well-being and preventative care enables the 485 on-campus and 83 off-campus residents to pursue activities that support a sense of individual fulfillment and purpose.

Carol Woods was founded in 1979 by a group of local residents wanting to retire in Chapel Hill. It is governed by a local, all-volunteer Board of Directors that is entrusted with the fiduciary responsibility and strategic direction of the community.

*Photos were taken on-site at Carol Woods Retirement Community.*





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www.facebook.com/carolwoodsretirementcommunity

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*Carol Woods is an accredited, not-for-profit community.*

A resident-driven initiative brought beehives to campus in 2014.

