

# 2022 Annual Report

## Retirement Housing Foundation



Dedicated to *Excellence*







The **V**ision of RHF is a society in which all people have quality, affordable housing.

The **M**ission of RHF is to provide housing and service coordination for persons with limited incomes in an inclusive environment that enhances their quality of life physically, mentally, and spiritually.

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# Messages

from our

## Leadership

### Dedicated To Excellence

2022 marked the first full year of operation following the implementation of RHF's Strategic Plan.

### The Four Pillars

RHF's Strategic Plan is organized into four pillars; Asset Optimization & Growth; Operational Excellence; Philanthropy & Communications; and Resident & Staff Experience.

Three of the pillars (Operational Excellence, Philanthropy & Communications and Resident & Staff Experience) talk about implementing systems and programs that will impact the day-to-day operations of the organization, including our communities.

Team members at the national office have been working hard on the logistics of what that means: hiring additional staff in certain departments, identifying what programs we need to implement, and determining the cost involved in that implementation.

One example of this is regarding our Human Resources department. Plans are to integrate the payroll system with a Human Capital Management (HCM) system. Staff will be hired to convert RHF's HR current manual processes into an on-line automated system. This includes centralizing the entire HR processes at the national office. The goal is to better manage our workforce through the entire employee lifecycle.

Staff and residents should start seeing the results of those efforts beginning in 2023.

### A Difficult Decision

In December of 2021, with the RHF Board concurrence, we made the difficult decision to divest 16 senior living/healthcare communities. We entered into a purchase and sale agreement with Pacifica Companies, a senior living provider, headquartered in San Diego, California.

### RHF Fast Facts:

- Employs more than 1,900 people throughout the United States, Puerto Rico and the U.S. Virgin Islands.
- More than 20,500 people call an RHF community "home".
- We now have communities in 29 states, Washington, D.C., Puerto Rico and the U. S. Virgin Islands.
- More than 80 RHF residents are over the age of 100, and are living independently.

(Continue on page 6)



## Greetings ...

Greetings and welcome to the 2022 Annual Report of the Retirement Housing Foundation.

Thank you for taking the time to read these pages and become more familiar with the rich history and the current mission of RHF.

One of the joys of serving on the RHF board is to visit some of our communities. We missed these opportunities during the Covid 19 pandemic, but the board did visit several communities in the fall of 2022 as the pandemic protocols eased.

At one community a woman offered words of thanks for a daily devotional and prayer page that RHF had provided to residents and staff during the depth of the pandemic. She said, "I just want to thank RHF for the daily devotional and prayers you sent out during Covid. It gave me such hope and encouragement in a dark and lonely time."

As a person who had been one of the writers on the devotional project, I was delighted to hear the appreciation in this woman's comment. It was a powerful reminder that as a faith-based organization, RHF isn't just about building and managing properties but is about building and nurturing community that respects the dignity and worth of all persons. Home is clearly more than bricks and mortar and life more than days and years.

This past year saw us working to reset our priorities toward a sharp focus on affordable housing and the development of new communities that will contribute to the growing need for housing in this country, especially among seniors, persons with modest incomes, and those with special needs. We currently have more than 20,000 residents in our communities, but our waiting lists have several times this number, making the challenge clear to both staff and board.

Thank you to all who support the mission of RHF through financial gifts, volunteer time, services, and prayers. You are part of the community that is Retirement Housing Foundation and you are partners in our mission and vision.

As I complete my term as board chair, I want to thank our staff and my colleagues on the board. It has been a joy and a privilege to work with you. I also thank our many residents who trust us to offer not only housing but opportunities for community. Much hope and many blessings to you all.

Rev. Dr. David S. Moyer  
RHF National Board Chair



Throughout 2022, executive staff worked on the disposition of six of the properties (with work continuing in 2023 on the other dispositions). Our decision and related work grew out of the RHF “strategic plan” and modification of the RHF mission. We believe it is important for us to focus on the development and operation of affordable housing, recognizing that all members of society deserve a decent place to live. We further believe now is the right time to focus on those who are underserved. Transitioning our market rate retirement communities to another owner/operator will enable us to dedicate more resources to meeting the needs of lower-income older adults, families and people with disabilities. It is a responsibility our mission compels us to fulfill.

## Diversity, Equity and Inclusion

As next steps to implementing our new strategic plan, RHF launched its DE&I initiative in February 2022. Working with a consultant, the RHF Board of Directors and senior leadership, we focused on 5 initial areas:

- 1) Understanding our why and taking stock of RHF’s progress to date
- 2) Creating a space for dialogue, learning and forward movement
- 3) Identifying a common language and understanding around DE&I
- 4) Framing the work ahead
- 5) Identifying opportunities and measurements of success

Additionally, a cross-section of RHF team members across the organization and representing a variety of job functions, geographies and backgrounds were asked to serve as a DE&I Core Group to help shape and lead the development of the framework of RHF’s DE&I plan.

Last year, affordable housing and national office staff were invited to participate in two surveys to help provide baseline data around perceptions, needs, experiences, barriers and opportunities. Recognizing that our collective work to adopt and maintain a culture of DE&I is a journey, this assessment illuminated RHF’s current state (current Culture of Equity – COE) related to those efforts and identified best practices.

Four key pillars were outlined for RHF’s Diversity, Equity & Inclusion work in the years ahead.

- 1) Strengthening organizational culture
- 2) Training and development
- 3) Policy review, analysis and updating
- 4) Building internal communications structures and processes

We look forward to sharing updates to our work and practices in the months ahead as our DE&I plan rolls out across the organization.

## COE Findings

Perceptions do not always reflect reality. However, organizational perceptions matter and offered a window into opportunities for Retirement Housing Foundation to strengthen its commitment and practice of inclusion and equity. The following represents a summary of the weighted averages for each of the 10 organizational factors measured by its COE assessment (seen on page 9). They are ordered by weighted average (highest to lowest).

Opportunities and RHF’s DE&I plan focus was based on the COE findings:

- 1) Developing a consistent understanding of what DE&I is and why it matters to RHF’s work, mission and organizational development

(Continue on page 8)

# Strategic Plan Framework: 2022 - 2025

## Pillars - Where will we focus?

### ASSET OPTIMIZATION AND GROWTH

### OPERATIONAL EXCELLENCE

### PHILANTHROPY AND COMMUNICATIONS

### RESIDENT AND STAFF EXPERIENCE

## Goals - What do we want to achieve?

*Balance portfolio to optimize asset management; expand partnerships and strategically grow assets through new affordable housing development and acquisitions*

*Activate RHF's vision and strategy through enhanced staff recruitment, training and retention; governance; internal systems and technologies; and DE&I commitment across the organization*

*Increase visibility and philanthropic support*

*Continue to leverage and grow resident and staff loyalty and satisfaction*

## Strategies - How will we achieve our goals?

*Rebalance portfolio to maximize sustainability and mission alignment*

*Pursue strategic asset growth in affordable housing*

*Strategically expand housing options for homeless and near-homeless seniors and veterans and work synergistically with partners*

*Attract, train and retain talented staff*

*Strengthen board recruitment and succession*

*Develop senior leadership succession plan*

*Align systems and structures with the overall strategy*

*Use technology to modernize operations, increase productivity, decrease costs and improve the resident and employee experience*

*Align organizational plans with RHF's DEI commitment*

*Develop organization-wide brand strategy and refine core messaging to better tell our story and convey our value*

*Establish a culture of philanthropy and encourage donors to engage with residents and communities*

*Diversify sources of philanthropic funding*

*Create a plan for organization-wide information sharing*

*Explore how to centralize advocacy and thought leadership*

*Strengthen and grow RHF's organizational culture of caring, belonging and community*

*Identify and implement an online resident and staff satisfaction survey within two years, or determine feasibility of doing so*

*Develop a comprehensive approach connecting resident experience to property management expectations and benchmarks for success, advancement, competitive compensation, etc.*

- 2) Formulating a DE&I vision that builds on that consistent understanding of what DE&I is and why it serves RHF's work
- 3) Ensuring consistent leadership perspective, commitment, understanding and communication aligned with that vision
- 4) Developing HR approach and policies and internal communications to support that vision
- 5) Building knowledge and capacity around foundational DE&I principles and best practices

## We Are Growing

During 2022 we acquired two more affordable senior housing communities.

### Slate Creek Apartments

Our third community in Illinois, Slate Creek Apartments, is located in the south central part of the state in Effingham. This two story, 113 unit community is for seniors over the age of 62 or over the age of 18 and mobility impaired.

Effingham is known as the "Home of The Cross at the Crossroads." The Cross stands 198 feet tall and 113 feet across and is considered the largest cross in America.

### Regency Apartments

Regency Apartments is our second community located in Mason City (the other is Pilgrim Place) and our seventh affordable community in Iowa. This three-story, 40 unit community is for older adults 62 years of age or older or over the age of 18 and mobility impaired.

Since we are sharing fun facts about the communities that our facilities are in, did you know that Mason City, Iowa has the largest collection of Frank Lloyd Wright architecture in the United States?

## In The Future

Looking forward, 2023 is going to be an exciting year at RHF. We will be in our second full year of our strategic plan and will incorporate our new DE&I program into that plan.

We will continue our commitment to expand the use of technology by increasing the areas where technology is applied. A few communities are currently testing programs in the areas of maintenance and accounts payable and, when appropriate, they will be rolled out to other communities.

### Growing Our Portfolio

While it is common knowledge that our Development and Acquisitions Department is always looking for affordable communities to add to our portfolio, what isn't as well known is the fact that they are also looking for land in areas that would be suitable to build affordable housing.

RHF is working on two projects where land has been purchased and now we are working on locating funding to build affordable housing communities.

In 2012 RHF entered into a partnership with Congregational Community Development Corporation (CCDC) and the First Congregational UCC in Chula Vista, California to refinance and rehab their 186-unit affordable senior community. We are pleased to report that our relationship with them continues today. Additional land was purchased in Chula Vista in 2022 with the intent to build another affordable housing community for seniors in Chula Vista.

In 2022 RHF purchased land in Westminster, California with plans to build an affordable community for seniors at that location.

RHF is committed to providing affordable housing for seniors, working class families and persons with disabilities. The need has never been greater.



## Summary of the 10 Organizational Factors by its Culture of Equity (COE) Assessment

| Assessment Factor   | Weighted Average<br>out of 4 |
|---------------------|------------------------------|
| Donors & Volunteers | 2.95                         |
| Communications      | 2.94                         |
| Mission Impact      | 2.90                         |
| Board Leadership    | 2.87                         |
| Senior Staff        | 2.84                         |

| Assessment Factor      | Weighted Average<br>out of 4 |
|------------------------|------------------------------|
| Staff & HR Policies    | 2.73                         |
| Commitment to Equity   | 2.70                         |
| Date & Metrics         | 2.69                         |
| Vendors                | 2.66                         |
| Organizational Culture | 2.63                         |



Slate Creek Apartments in Effingham, Illinois was added to the RHF portfolio in 2022.

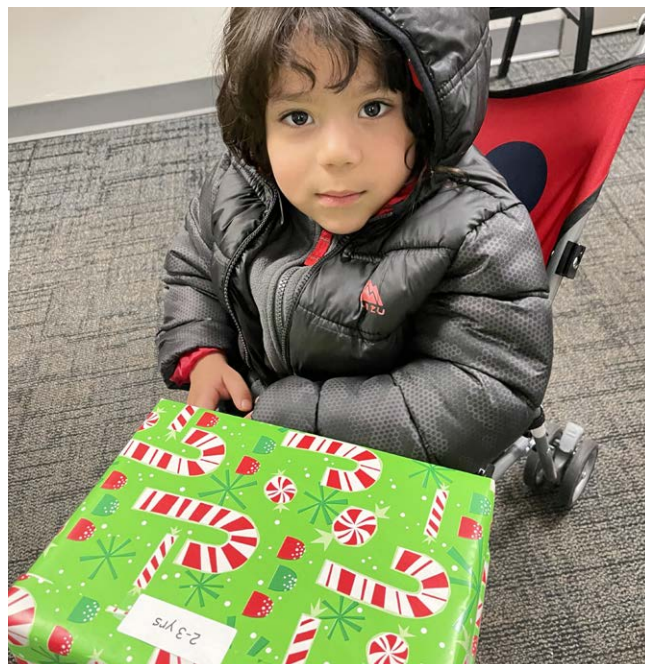
Regency Apartments in Mason City, Iowa was added to the RHF portfolio in 2022.



# 2022 Social Accountability Report

A young resident of Shepherd Park Apartments (Hartford, CT)

- RHF Charitable Foundation's Unwrap a Smile with RHF program for the annual toy drive raised more than \$45,000 for Toys for RHF Kids, providing toys and gift cards to more than 1,700 children living in RHF communities.



"As a manager, I get several calls a day from desperate people who lack the basics like food and shelter. I see them on my way to and from work as well, crowded in tents and street corners. I wonder how I can make a difference in people's lives. One easy way is being an RHF Team Giver. I know my money is going for a good cause and the team distributing the proceeds is caring and thoughtful in all they do. Thank you, RHF!"

Kathleen Zalesny, Manager  
Redding Pilgrim House / Redding RHF Housing  
Redding, CA

- Team Givers donated \$43,521 to RHF Charitable Foundation and RHF Communities through monetary and in-kind gifts throughout the year.

- RHF communities opened their doors to 1,109 organizations, allowing them to use community and conference rooms to hold their meetings.
- 1,247 RHF staff and residents volunteered 45,031 hours to 910 nonprofit and community organizations. In addition, 643 RHF staff and residents donated \$6,515 to 147 nonprofit and community organizations.





The residents of Capitol Towers Apartments (Hartford, CT)

- Project H.A.N.D.S.® continues to be the largest organization of volunteers at RHF with 657 residents from more than 90 communities volunteering 32,097 hours; 143 outside agencies and businesses involved; and 33,929 handmade items donated to community shelters, hospitals, and people in need.

College students Christian and Mitzy are residents of RHF's Rio Vista Village (Los Angeles, California) and are both proud RHFCF's Youth Education Scholarship recipients. They have a passion for giving back and hearts for serving others. Christian is a first-generation college student who is studying Philosophy and Law at the University of Southern California (Los Angeles, California). He dreams of going to law school after he receives his undergraduate degree, so he can serve vulnerable populations, including children and older adults. Mitzy is a Criminology and Justice major at Humboldt State University (Arcata, California). Her dreams are to join the Los Angeles Police Department and work as a detective, serving and protecting those in need.



- Through donors' contributions to the Youth Education Scholarship Fund, young residents residing in our family communities received scholarships totaling \$12,000 in 2022. Support through the Youth Education Scholarship Fund invests in the education of youth residing in RHF family communities and helps cover the cost of tuition, tutoring programs, school uniforms and supplies, as well as after-school and summer educational programs.

- 2,615 persons volunteered 52,917 hours to RHF communities and the national headquarters office, helping in a variety of ways. This does not include the numerous governance hours that our national, local and advisory board members contribute each year.



# The RHF Leadership Team



Rev. Dr. David Moyer  
Chair  
Wisconsin



Rev. Dr. Norma DeSaegher  
Vice Chair  
California



Don Hart  
Treasurer  
Florida



Jeff Pollock  
Vice Chair  
Ohio



Don Miner  
Arizona



Catherine Collinson  
California



Dr. Darryl Sexton  
California



Cheryl Wilson  
California



Andrew Bunn  
Hawaii



Dr. John Bauman  
Maine



Christina Potter  
Vermont



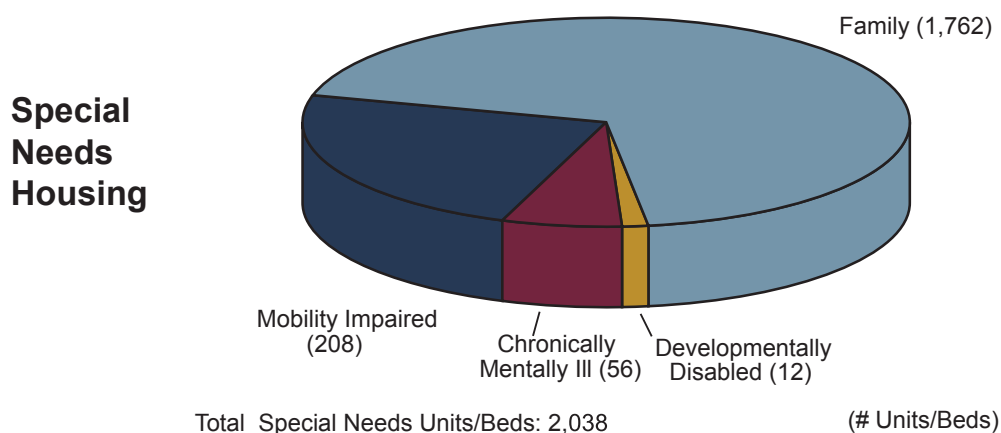
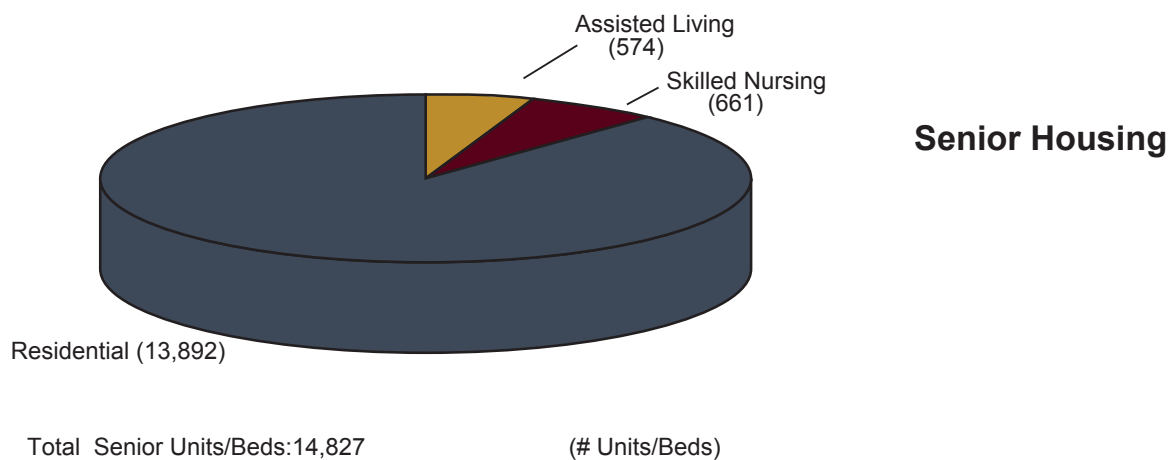
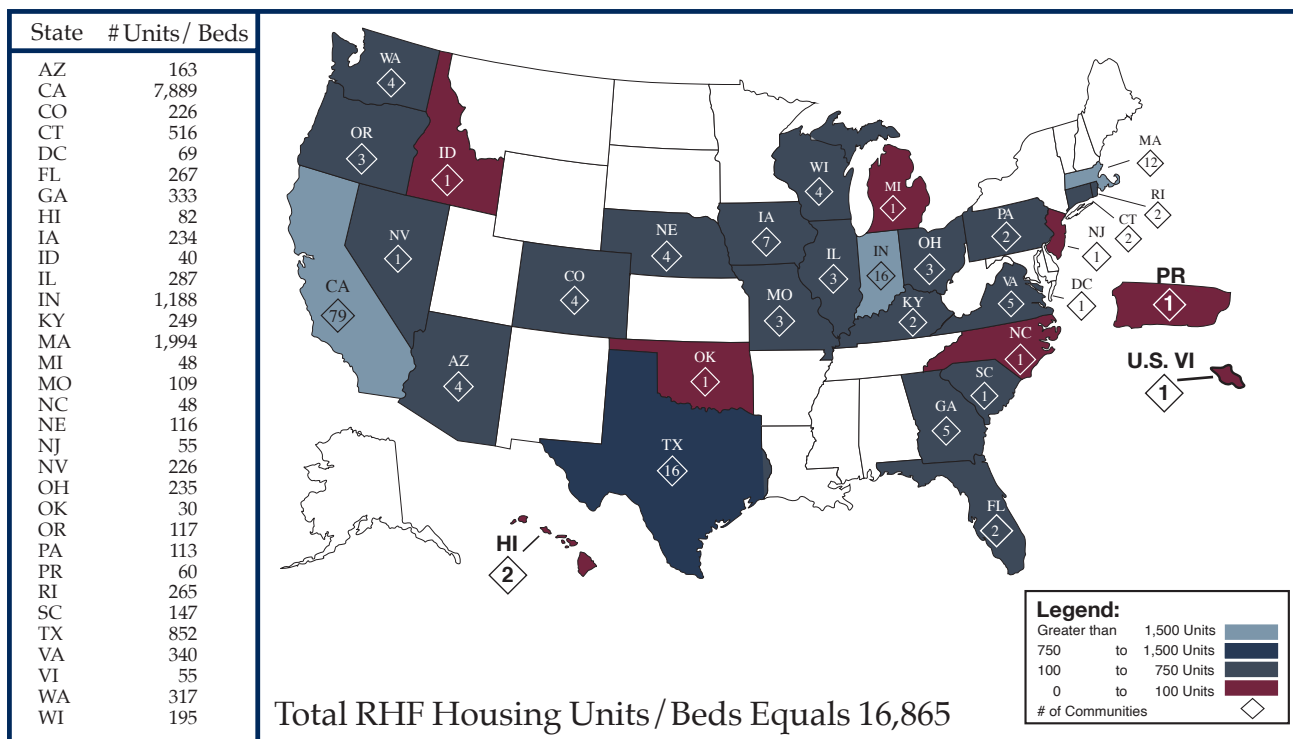
Raymond East  
Virginia



Brian Koide  
Virginia

Our National Board of Directors come from different backgrounds, different parts of the country and all walks of life - but they are committed to a common goal - RHF's Mission, Vision and Values.

# Housing and Services Information



## Consolidated Statements of Financial Position (000's omitted)

|   | September<br>2022 | September<br>2021 |
|---|-------------------|-------------------|
| <u>Assets</u>                                       |                   |                   |
| Current Assets                                      | \$ 63,760         | \$ 71,525         |
| Long Term Investments                               | 23,268            | 71,942            |
| Land, Buildings, Equipment<br>(Net of depreciation) | 5,285             | 5,642             |
| Other Assets  | 306,325           | 269,445           |
| <u>Total Assets**</u>                               | <u>\$ 398,638</u> | <u>\$ 418,554</u> |
| <u>Liabilities and Net Assets</u>                   |                   |                   |
| Current Liabilities                                 | \$ 46,714         | \$ 14,420         |
| Long Term Liabilities                               | 46,442            | 51,949            |
| Subtotal  | 93,156            | 66,369            |
| <u>Net Assets**</u>                                 | <u>305,482</u>    | <u>352,185</u>    |
| Total Liabilities and Net Assets                    | <u>\$ 398,638</u> | <u>\$ 418,554</u> |

## Consolidated Statements of Activities (000's omitted)

|  | Year Ending<br>9-30-28 | Year Ending<br>9-30-21 |
|--|------------------------|------------------------|
| <u>Revenues - Unrestricted</u>                         |                        |                        |
| Management Fees  | \$ 16,245              | \$ 18,652              |
| Development Fees                                       | 4,416                  | 3,309                  |
| Distributions from Affiliates and Other                | 15,050                 | 20,397                 |
| Gain on Sale of Assets                                 |                        |                        |
| Total Operating Revenues                               | <u>\$ 35,711</u>       | <u>\$ 42,358</u>       |
| <u>Operating Expenses</u>                              |                        |                        |
| General and Administrative                             | \$ 19,167              | \$ 17,328              |
| Depreciation and Amortization & Other                  | 10,458                 | 10,635                 |
| Total Operating Expenses                               | <u>\$ 29,625</u>       | <u>\$ 27,963</u>       |
| Operating Income                                       | 6,086                  | 14,395                 |
| Net Non-operating Revenue & Other                      | (52,428)               | 2,030                  |
| Change in Net Assets, w/out Donor Restrictions         | (46,342)               | 16,425                 |
| Change in Net Assets, with or w/out Donor Restrictions | (361)                  | 986                    |
| Change in Total Net Assets                             | <u>\$ (46,703)</u>     | <u>\$ 17,411</u>       |

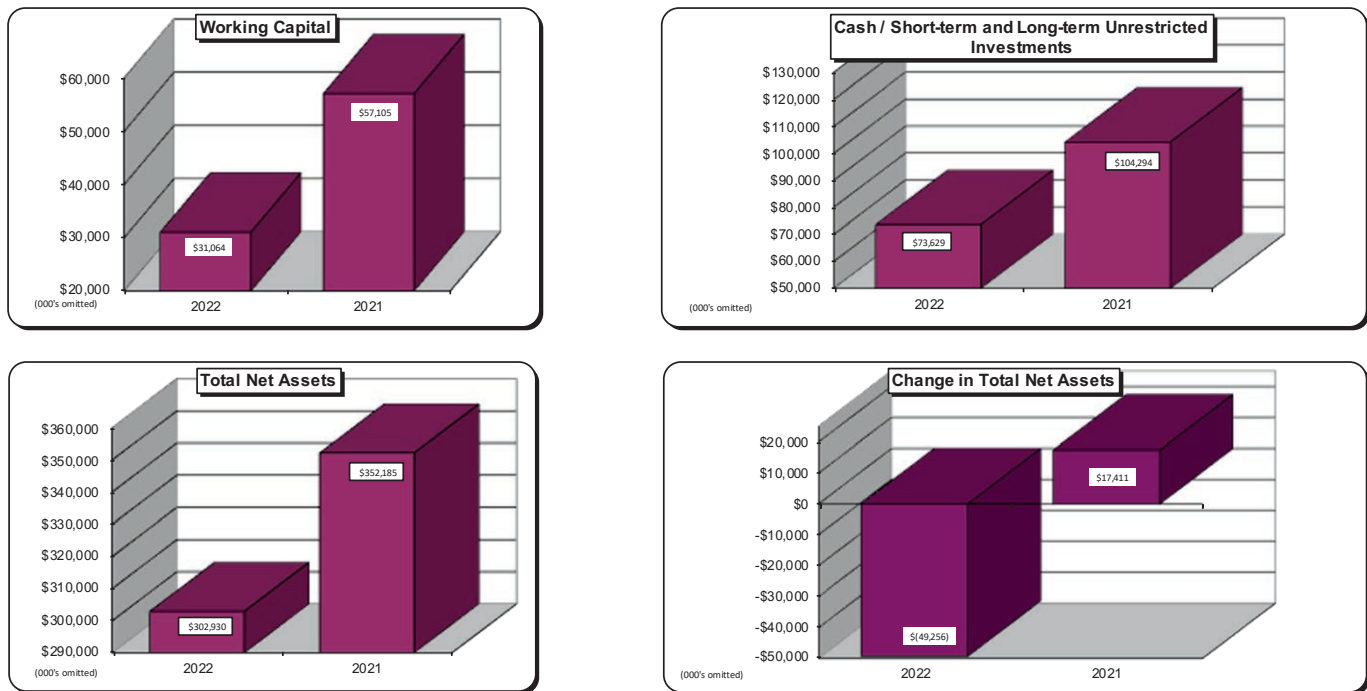
\*\*Total Assets and Net Assets include with Donor Restrictions balances of \$75,197 and \$76,004 in 2022 and 2021, respectively. RHF financial statements are presented for convenience and information purposes only, and while reasonable efforts have been made to ensure the integrity of such information they should not be relied upon. A copy of the audited financial statements will be provided upon request.



The financial information presented is for the parent organization only. As such, the entities included are the following:

- Retirement Housing Foundation  
Foundation Property Management, Inc.  
RHF Foundation, Inc.  
RHF Charitable Foundation
- United Congregate Care, Inc.  
Retirement Enterprises, Inc., Delaware  
Retirement Enterprises, Inc., California  
RHF Management, Inc.

## Highlights



The following is a summary of affiliated entities, which are not consolidated in these financial statements:

| Entity Classification   | Number of Entities |
|---|--------------------|
| Not-for-profit single-purpose entities owned and receiving government subsidy, currently in operation | 118                |
| Not-for-profit healthcare facilities owned, currently in operation                                    | 16                 |
| Not-for-profit properties owned, managed by others  | 14                 |
| Tax Credit Partnerships:  | 43                 |
| (ownership interest ranging from .01 percent to 16.9 percent)   |                    |
| Not-for-profit properties managed for third party owners  | 1                  |
| Not-for-profit properties owned, currently in development   | 3                  |
| Not-for-profit Corporate entities owned   | 2                  |
| <b>Total Entities Not Consolidated</b>  | <b>197</b>         |

# Chronological Listing of Communities

1965  
Mayflower Gardens  
Lancaster, CA

1966  
Bixby Knolls Towers  
Long Beach, CA

Pioneer House  
Sacramento, CA

1970  
Plymouth Square  
Stockton, CA

1971  
Bixby Knolls  
Health Care and  
Rehabilitation Center  
Long Beach, CA

Mayflower Gardens  
Convalescent Hospital  
Lancaster, CA

1974  
Pilgrim Tower North\*\*  
Pasadena, CA

Ralston Tower  
Modesto, CA  
+ Trinity United  
Presbyterian Church  
(MACHCO)

1975  
Sun City Gardens  
Sun City, CA

1976  
Harbor Tower\*\*  
San Pedro, CA  
+ Warren Chapel Christian  
Methodist Episcopal Church

MacArthur Park Towers\*\*  
Los Angeles, CA

1978  
Pioneer Towers\*\*  
Sacramento, CA

1979  
Auburn Ravine Terrace  
Auburn, CA  
+ First Congregational  
Church of Auburn

Pilgrim Tower East  
Pasadena, CA

1980  
Mayflower Gardens II  
Lancaster, CA

Southpointe Villa  
Rialto, CA

1981  
Angelus Plaza\*\*  
Angelus Plaza North\*\*  
Los Angeles, CA

The Towers at Crooked Creek  
Indianapolis, IN

The Towers at Southdale  
Anderson, IN

1982  
The Heartland  
Peoria, IL

Plymouth Place\*\*  
Stockton, CA

Yellowwood Terrace  
Clarksville, IN

1983  
Diakonia Housing I  
Rancho Cordova, CA

Diakonia Housing I  
Sacramento, CA

Marple Manor  
Modesto, CA  
+ MACHCO

West Valley Towers\*\*  
Van Nuys, CA

1984  
Gold Country  
Health Care Center  
Placerville, CA

Longfellow Plaza  
Anderson, IN

Monona Meadows  
Monona, WI

1985  
Charles Major Manor  
Shelbyville, IN

1985  
Culver City Rotary Plaza\*\*  
Culver City, CA

Donald Jordan, Sr. Manor  
Garden Grove, CA  
+ Acacia Adult Day Services

Lake Ella Manor  
Tallahassee, FL

Pioneer Manor  
Geneva, NE  
+ First Congregational UCC

Redding RHF Housing  
- Butte Home  
- Cottonwood Home  
Redding, CA

Round House Manor  
Kaukauna, WI

1986  
300 Main  
Estacada, OR

Anciano Tower  
Montrose, CO

Carbon Creek Shores  
Anaheim, CA  
+ Dayle McIntosh  
Center for Disabled

The Carolinian  
Florence, SC

Gold Country  
Retirement Center  
Placerville, CA

Great Plains Housing  
North Platte, NE  
+ Great Plains Mental  
Health Center

LaFontaine Center  
Huntington, IN  
+ Historic Landmarks  
Foundation of Indiana

Lomita Kiwanis Gardens  
Lomita, CA  
+ Lomita Kiwanis Club

Malone Manor  
Lincoln, NE

1986 (cont.)

Pauahi Kupuna Hale  
Honolulu, HI

Pinehurst Apartments  
Palestine, TX

Pinewood Manor  
Bremerton, WA  
+Mt. Zion Baptist Church

University Center  
Indianapolis, IN  
+ University Methodist Church

Villa at Sacred Heart\*  
Indianapolis, IN  
Hispanic Housing Services, Inc.

Vistas\*\*  
Van Nuys, CA

1987  
Centennial Manor  
Boise, ID  
+ University Christian Church

Escalon Heritage House  
Escalon, CA  
+ Saron Lutheran Church  
+ Escalon Christian

Reformed Church  
+ Escalon Presbyterian Church

Fajardo Elderly Apartments  
Fajardo, Puerto Rico

Madison Heritage Apartments  
Madison, IN

Mission Palms  
Mission, TX

Pilgrim Place  
Mason City, IA  
+First Congregational Church

Prairie Grove Apartments  
East Prairie, MO  
+East Prairie Chamber  
of Commerce

Redding Pilgrim House  
Redding, CA

River City  
Residence Club  
Sacramento, CA  
+Transitional Living  
and Community  
Support, Inc.

The Tower at Crooked Creek  
Indianapolis, IN.



Pioneer Towers  
Sacramento, CA

Congregational Tower  
Chula Vista, CA

1988  
Dogwood Apartments  
Milledgeville, GA

The Gateway  
Poway, CA

Guadalupe Senior  
Apartments  
Denver, CO

Maple City Square  
La Porte, IN

Marymount Manor  
Tacoma, WA

Olson Rotary Village  
Delano, CA  
+Delano Rotary Club

Richardson Manor  
Milwaukee, WI

Vacaville Autumn Leaves  
Vacaville, CA  
+California Grange

1989  
Anaheim Memorial Manor  
Anaheim, CA

1989 (cont.)  
Camelot Village  
Council Bluffs, IA

Casa de Pinos  
Prescott, AZ

Cimarron Court  
Kearney, NE

Colonial Heights  
Florence, KY

The Concord\*\*  
Pasadena, CA

Gaslight Apartments  
Converse, IN  
+Kokomo OIC, Inc.

Lakeview Manor  
Storm Lake, IA

Loess Hills Estates  
Glenwood, IA



+Co-sponsor  
\*Third Party Management  
\*\*Syndicated Project



|   |   |   |   |
|---|---|---|---|
| 1989 (cont.)<br>Miracle Manor<br>Edna, TX   | 1992<br>Adam and Bruce Apartments<br>Fort Wayne, IN<br>+ True Love Missionary<br>Baptist Church   | 1998<br>Creekbend Gardens<br>Houston, TX                                      | 2004<br>Los Arcos**<br>Poway, CA  |
| Westover Manor<br>Cedar Rapids, IA  | New Hampshire Apartments<br>Los Angeles, CA   | 2000<br>Abbey Apartments<br>Indianapolis, IN                                  | Lowell Place<br>Bakersfield, CA<br>+ Bakersfield Senior Center                    |
| 1990<br>Bennett Place<br>Pittsburgh, PA<br>+ Action Housing<br>+ Operation Better Block | Stone Creek Village<br>Phoenix, AZ  | 2001<br>Colonia Jess Lopez<br>Los Angeles, CA                                 | Mason Place**<br>Boston, MA   |
| Capital Court<br>Corydon, IN  | Sunny Isle Housing<br>for the Elderly<br>Christiansted, St. Croix,<br>The U. S. Virgin Islands    | Colonial Gardens<br>Florence, KY  | North Capitol at Plymouth<br>Washington, D.C.<br>+ Plymouth<br>Congregational UCC |
| Grace Place<br>Norfolk, VA  | Valley View Apartments<br>Manitowoc, WI   | Cornerstone Gardens<br>Houston, TX  | 2006<br>Douglas House**<br>Brockton, MA   |
| La Mirada Vistas<br>La Mirada, CA   | Wilshire House<br>Santa Monica, CA  | Esperanza Apartments**<br>Seattle, WA   | Hamilton Wade**<br>Brockton, MA   |
| Lindsay Place<br>Lindsay, OK  | 1993<br>Virginia Park Apartments<br>Des Moines, IA  | Park Place<br>Seattle, WA   | Ingleside Manor<br>Macon, GA  |
| Mill Pond Manor<br>Saline, MI<br>+ Evangelical Homes of<br>Michigan                     | 1994<br>Cocalico Place<br>Ephrata, PA<br>+ Bethany UCC  | Symphony Plaza East**<br>Symphony Plaza West**<br>Boston, MA                  | Northvale Village<br>Houston, TX  |
| Pecan Place<br>Bonham, TX   | Harry and Jeanette Weinberg<br>Philip Street Apartments<br>Honolulu, HI                           | The Stearns**<br>Boston, MA   | Oak Knoll Villa<br>San Antonio, TX  |
| Sangnok Villa<br>Los Angeles, CA<br>+ Korean American Christian<br>Evergreen Assn.      | 1996<br>The Carlin**<br>Arlington, VA   | 2002<br>Amistad Plaza**<br>Los Angeles, CA                                    | 2007<br>Farrfield Manor<br>Columbus, GA   |
| Villa Nueva<br>Los Angeles, CA  | 1997<br>Cardosa Village<br>Sacramento, CA<br>+ Transitional Living and<br>Community Support, Inc. | Benson Manor<br>Smyrna, GA  | Providence Place<br>Salem, OR   |
| Winslow Manor<br>Winslow, AZ  | Granada Gardens<br>Granada Hills, CA  | Seabury Heights**<br>Worcester, MA  | 2008<br>Bexton Place<br>San Antonio, TX   |
| Yorkshire Place<br>Cape May, NJ   | Haven 501 Apartments<br>(Madison Avenue)<br>Los Angeles, CA                                       | 2003<br>Binnall House**<br>Gardner, MA  | Harvest Pointe<br>Loveland, CO  |
| 1991<br>Crescent Manor<br>Mesquite, TX  | Haven 501 Apartments<br>(Burlington Street)<br>Los Angeles, CA                                    | Gateway Gardens<br>Poway, CA  | 2009<br>Mount Beulah Terrace<br>Pagedale, MO                                      |
| Kemet House<br>Chesapeake, VA   | St. James Apartments**<br>Los Angeles, CA   | Hollyview**<br>Los Angeles, CA  | 2010<br>Desert Sage<br>Hermiston, OR  |
| Klein Manor<br>Los Alamitos, CA   | Rio Vista Village**<br>Los Angeles, CA  | Independence Square<br>Evansville, IN   | Harshfield Terrace<br>Quartz Hill, CA   |
| Mesquite Gardens<br>Mesquite, TX  |   | King James Court**<br>Orange, MA  | Riverside Village**<br>Leominster, MA   |
| Towne Creek Apartments<br>McKinney, TX  |   | Pine Crest**<br>Orange, MA  | Shepherd Park**<br>Hartford, CT   |
| 1991 (cont.)<br>Verde View<br>Camp Verde, AZ  |   | Village Pointe<br>Norfolk, VA<br>+ First Baptist Church of<br>Lambert's Point | Village Gardens<br>Norfolk, VA  |

2012  
 Capitol Towers\*\*  
 Hartford, CT  
 College Villas\*\*  
 Henderson, NV  
 Congregational Tower\*\*  
 Chula Vista, CA

2013  
 Essex Village\*\*  
 North Kingstown, RI  
 Kings Grant\*\*  
 North Kingstown, RI  
 Lane Manor  
 Stone Mountain, GA  
 RHF The Whittier\*\*  
 Los Angeles, CA

2014  
 Broadwood Terrace\*\*  
 Los Angeles, CA  
 Las Alturas\*\*  
 Los Angeles, CA  
 Mabel Meshack White Manor  
 Dallas, TX  
 Madison Avenue Apartments  
 Loveland, CO

2015  
 Barringer Gardens  
 Charlotte, NC  
 Deaconess Krafft Center  
 Cleveland, OH  
 Deaconess Perry Center  
 North Royalton, OH  
 Deaconess Zane Center  
 Cleveland, OH  
 Desert Haven  
 Odessa, TX  
 The Towers of Jacksonville\*\*  
 Jacksonville, FL

2016  
 Immanuel Residences  
 Evergreen Park, IL  
 Paloma Terrace\*\*  
 Los Angeles, CA  
 Sonata at Riverpark\*\*  
 Oxnard, CA

2017  
 Ardmore Apartments\*\*  
 Los Angeles, CA



Mt. Beulah Terrace  
 Pagedale, MO

RHF Pacific Beach Shores  
 Pacific Beach, CA

2017 (cont.)  
 Bonnie Brae Apartments\*\*  
 Los Angeles, CA  
 Carondelet Court\*\*  
 Los Angeles, CA  
 Darson Marie Terrace\*\*  
 San Antonio, TX  
 The Gordon\*\*  
 Los Angeles, CA  
 Harvard Heights\*\*  
 Los Angeles, CA  
 Hobart Heights\*\*  
 Los Angeles, CA  
 Normandie Terrace\*\*  
 Los Angeles, CA  
 RHF Pacific Beach Shores  
 Pacific Beach, CA  
 Sagetree Terrace\*\*  
 Houston, TX  
 The Serrano\*\*  
 Los Angeles, CA  
 Witmer Apartments\*\*  
 Los Angeles, CA



North Capitol at Plymouth  
 Washington, D.C.

2018  
 Perryville Senior Apartments  
 Perryville, MO  
 Crenshaw Gardens\*\*  
 Los Angeles, CA  
 Crenshaw Villas\*\*  
 Los Angeles, CA  
 Paseo at California\*\*  
 Los Angeles, CA

2020  
 Hillcrest Acres  
 Attleboro, MA  
 2022  
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+Co-sponsor  
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*RHF Charitable Foundation would like to thank our business partners who have generously supported RHF's mission this year and who joined us for a harbor cruise in June.*

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# Philanthropy

*Together we can make a difference and change lives.*

*RHF Charitable Foundation is so thankful for its friends, residents, business partners, and team and board members, who regularly and generously contributed to bring continued care, comfort and hope to RHF residents, when they needed it most.*

***Your support helped us serve RHF residents and communities by:***

- ✦ *Providing more than \$228,000 in rental assistance grants to RHF residents.*
- ✦ *Offering \$12,000 in educational scholarships and delivering more than 1,600 holiday toys and gift cards to our RHF family communities .*
- ✦ *Providing 1,500 school-aged RHF children (4-17 years old) with back-to-school kits. Each kit included a backpack filled with supplies and a \$25 Famous Footwear gift card to help families purchase new school shoes.*
- ✦ *Awarding a \$500,000 grant to assist with the development of a new 55-unit affordable housing community for older adults (Baldwin Park, CA), and a \$13,000 grant to RHF's Pecan Place (Bonham, TX) to purchase new furniture for their newly-renovated community room.*

*On behalf of the 20,500 residents and 194 communities we serve, thank you for joining us to help thousands of older adults, families and people with disabilities thrive.*

***In the year ahead, RHF Charitable Foundation remains committed to:***

- ✦ *Providing philanthropic resources to support RHF's work*
- ✦ *Stewarding our assets in ways consistent with RHF's mission, vision, and values*
- ✦ *Communicating program and project impact*
- ✦ *Being a positive presence in the communities we serve*

*Stephanie Titus, M.B.A., CFRE*

*Chief Strategy Officer & Vice President of Philanthropy, RHF  
President, RHF Charitable Foundation*

## ***Starting the New School Year Off on the Right Foot***

RHF Charitable Foundation's Resident Benevolence Fund provided 1,500 school-aged RHF children (4-17 years old) with RHF back-to-school kits.

Each kit included a backpack filled with supplies and a \$25 Famous Footwear gift card to help families purchase new school shoes.

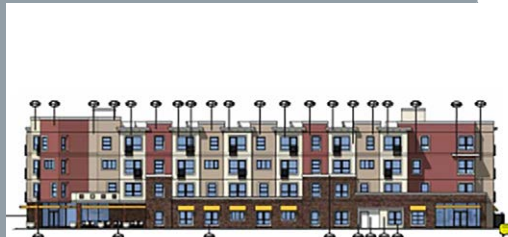
The money funding the Kicks 4 Kids program, comes from the generous donors who support RHF Charitable Foundation's Resident Benevolence Fund.



## The Affordable Housing Fund Assists Two RHF Projects

In partnership with RHF's Development Department, RHF Charitable Foundation provided a \$500,000 grant to assist with the development of a new 55-unit affordable housing community for older adults in Baldwin Park, California.

This project is set to break ground in 2023 and in addition to the 55 apartments, this four-level complex will include commercial space, a community room with a party kitchen along with an arts and crafts room, exercise room, laundry room, and main courtyards/gardens.



RHF Charitable Foundation also provided a \$13,000 grant to RHF's Pecan Place (Bonham, TX) to purchase new furniture for their newly-renovated community room.

The money funding both these projects, comes from the generous donors who support RHF Charitable Foundation's Affordable Housing Fund. These corporate and individual donors, who often include RHF staff members, recognize the value and importance of affordable housing.

## RHF Circle of Friends

The RHF Circle of Friends is our legacy society. There are many ways to qualify for membership, such as RHF gift annuities that provide lifetime income to the donor, life insurance, real estate gifts, charitable remainder trusts, and gifts from pension fund assets and/or simply including RHF in your Will or Trust.

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(\*indicates members who have passed away)

If you have named Retirement Housing Foundation as a beneficiary of a planned gift, please allow us to honor you as a member of the RHF Circle of Friends. If you would like more information about how to include RHF or an RHF community in your will, or structure a life income gift that benefits you and your family, please call 562-257-5141.

## In Honor Of . . .

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Diane King

... Robert Amberg

Diane King

... Cameron Azemikhah

Diane King

... Nada Battaglia

Diane King

... Kris Blackmon

Diane King

... Brenda Boonlua

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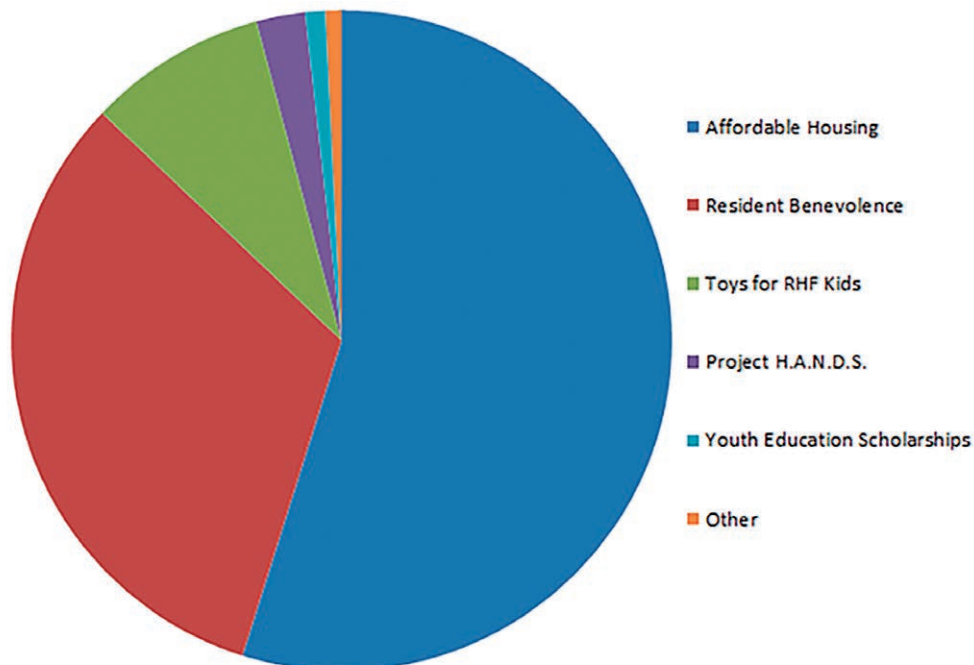
# 2022 RHF Charitable Foundation Fund Descriptions

## Our FUNDS:

Donors may designate their contribution to any of these RHF Charitable Foundation established funds:

- ***Affordable Housing*** - Helps preserve, maintain and create affordable housing across the country.
- ***Resident Benevolence*** - Provides rental assistance to residents in unsubsidized communities and funds programs to enhance quality of life for residents of all ages.
- ***Youth Education Scholarships*** - Offers educational scholarships to the 1,700 children and young adults living in RHF's family communities.
- ***Toys for RHF Kids*** - Delivers holiday toys and gift cards to the 1,700 children living in RHF's affordable communities every December.
- ***Project H.A.N.D.S.®*** - Provides crafting materials for RHF residents to create handmade items. These items are then donated to local shelters, schools, hospitals, and other organizations.

RHF Charitable Foundation supports the work and mission of RHF by raising, managing and disbursing charitable funds. Funds are used for the creation, preservation and maintenance of affordable housing and resident benevolence programs.



# 2022 National Headquarters Donors

The following donors made monetary or in-kind donations to RHF Charitable Foundation's funds through the national headquarters office from January 1, 2022 to December 31, 2022.

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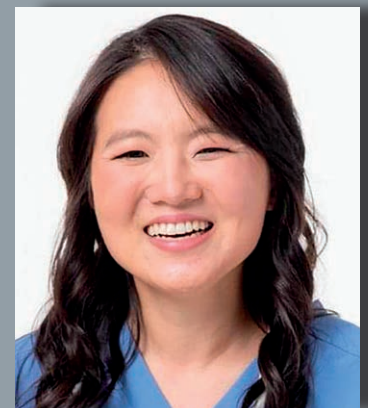
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## ***RHFCF Scholarship Recipient Looks Forward to Serving Others with a Career in Nursing***

RHF resident, Dahae, first applied for RHFCF's Aging Services Youth Education Scholarship in 2019 when she was first starting a graduate program for nursing at Samuel Merritt University. She always had a passion for science, but was inspired to pursue a career in nursing through her experiences going to doctors' appointments with her older family members, where she served as a translator.

Each year she has applied for and been awarded this scholarship and as Dahae gets ready to graduate, she wanted us to share this with everyone who made this support possible:

"The Retirement Housing Foundation Scholarship made a huge difference in my life. This scholarship provided me with a valuable opportunity to pursue a graduate study in nursing and give back to my community. I am currently in my last year of the Family Nurse Practitioner program at Samuel Merritt University. In my clinical rotations, I worked with low-income and uninsured older adults from under-resourced communities. I enjoy working with older adults, and I hope to continue serving this population in the future. My goal is to help them manage their chronic diseases, but more importantly, provide early health screenings that can help prevent diseases. I aspire to empower older adults to live a healthy and happy life. I feel extremely grateful and honored to receive this scholarship and serve my community as a nurse practitioner student. Thank you so much for your generosity and investing in my future!"





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 Xizhuang Tan  
 Yong Tan  
 Fai Nung Tang  
 Sai Tang  
 Robert Tate  
 Feliciano Tavarez-Montilla  
 Shirley Telles  
 Hui-Fang Teng  
 Sister Kathleen Terlau  
 Zenawa Tessema  
 Chandrikaben Thaker  
 Rita Thibeault  
 Maryjo Timmons  
 Josefina Tirado  
 Lois Tiscione  
 Siu To

## 2022 Holiday Toy Drive Celebrated 25 Years

RHF's national toy drive celebrated 25 years this December!

Thanks to all of the donors and volunteers who support this program, we delivered toys and gift cards to more than 1,700 children living in our communities across the country, making their holidays merry and bright.





|                             |                         |                             |                             |
|-----------------------------|-------------------------|-----------------------------|-----------------------------|
| Lanford Tobe                | Cuitian Wang            | Bing Xiao Yan               | Katie Yoohoon Youn          |
| Julia Toc                   | & Christina Yang        | Chia Tze Yang               | Ki Soon Youn                |
| Maria Toledo                | Jiawu Wang              | Hai Yang                    | Young Youn                  |
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| Nazeli Toromanyan           | Qunxian Wang            | Jung Yang                   | Jean A. Younge              |
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| Residents & Staff           | Linda Heid              | Tsung Sheng Yang            | Vivian Yu                   |
| Dimlay Tran                 | & William G. Warrick    | Wen Yang                    | Wai Ling Yu                 |
| Van Nghia Tran              | Myrtle Watkins          | Yongcan Yang                | Wei Yu                      |
| Ellen Traut                 | David Watterston        | Chris Yao                   | Yong Sin Yu                 |
| Kum-Ok Trentham             | John Weaver             | Miao-Qiong Yao              | Yuanxi Yu                   |
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| D.A. Tromm                  | Hsiumei Wei             | Peggy Yee                   | Suk Soon Yun                |
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| Tule Tule                   | Xuan Weng               | Li Mei Yen                  | Mansoureh M. Zanjani        |
| Aysegul Tuncer              | Westin Long Beach       | Greg Yeom                   | Jose Zaragoza               |
| Fu Chen Tung                | Belinda Wetterau        | Jung Sook Yeom              | Masha & Suzuki Zaretskaya   |
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| Ultimate Kronos Group (UKG) | Douglas Wickstrom       | Lam Yeung                   | Fangjian Zhang              |
| Modesta Urias               | Angel Williams          | Amanda Yi                   | Ju L. Zhang                 |
| Antonia Uribe               | Williams & Associates   | Chae Im Yi                  | Li Yun Zhang                |
| Vanessa Uy                  | Wilshire House          | Cho Cha Yi                  | Li Zhen Zhang               |
| Juan & Ibis Valdes          | Residents & Staff       | Chong Yi                    | Qiao Zhang                  |
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| Maria Valencia              | Candy Wingo             | Eun Soon Yi                 | Yuqin Zhang                 |
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| Valentina Vaysgant          | Kui-Sang Wong           | Hye Sun Yoo                 | Hui H. Zheng                |
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| Ruth Walz                   | Ying Xu                 | Jong Youn                   |                             |
| Chang Min Wang              | Yuling Xu               |                             |                             |

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The following donors made monetary or in-kind donations to the corresponding RHF community from January 1, 2022 to December 31, 2022.

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Four Seasons Cleaners  
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### **Courtenay Springs Village Merritt Island, FL**

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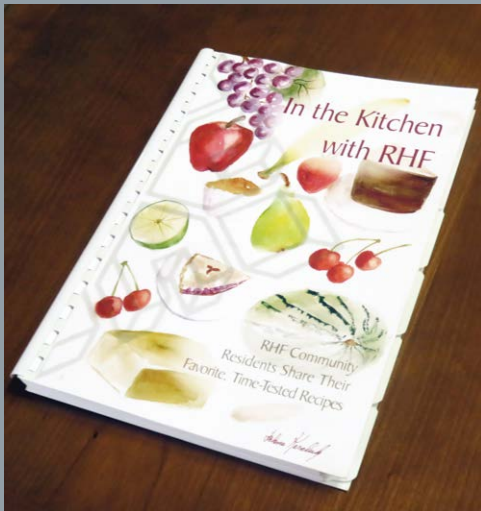
## **Yellowwood Terrace Clarksville, IN**

Heritage Insurance  
Hometown Lawncare

## **Yorkshire Place Cape May, NJ**

Robert Cox  
WaWa Markets

## *RHF Recipe Book Supports Our Residents and Makes a Great Gift*



In the Kitchen with RHF, a collection of time-tested recipes from RHF communities all over the country, is available to order and makes a great gift for the holidays. This book contains over 80 recipes ranging from tempting appetizers to scrumptious main dishes to delectable desserts that have all been submitted by residents of RHF communities.

While sampling these tried-and-true recipes, the reader can also learn a little about each resident and the RHF community that they call "home." This book is offered for \$10 for residents of RHF communities and \$15 for non-residents. Proceeds from this recipe book benefit RHF Charitable Foundation's Resident Benevolence fund, helping to provide emergency rental assistance and supporting our benevolence programs.

## In Memory Of . . .

### **... Jeff Baumann**

Kenneth Baumann

### **... Gerald Curran**

G. A. Burns

### **... Luisa E. Dillon**

Paula Suchy

### **... Perry Glenn**

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Paula Suchy

### **... Rev. Dr. John Trnka**

Shirley Trnka

### **... Verner Warr**

Angel Warr

### **... William Warrick**

& Jean Moore Warrick

Linda Heid & William G. Warrick

# 2022 RHF Team Givers

Our staff members perform important daily duties to make shelter and service a reality for the 20,500 people we serve. Staff members who additionally choose to voluntarily support RHF Charitable Foundation through monetary and in-kind donations are contributing to the fiscal health of our mission. We are extremely grateful for their optional financial commitment, as well as the investment they already have made with their hearts, lives and careers.

The following staff members personally contributed to our mission in 2022.

Carlos Adame  
Collen Adams  
Deborah Agbayani  
Celia Alvarado  
Cristina Amador  
Robert Amberg  
Shannon Ancira  
Jachina Anderson  
Anonymous Donors  
**Roland Arcebal**  
Christine Baca  
Mary Barner  
Nada Battaglia  
Sierra Batts  
Joycelyn G. Bautista  
Olivia Bendico  
Kevork Berberian  
Maritza Bermudez- Luna  
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**Traci Maxwell**

Grey = Sterling Club



“I like to support RHF and the reason behind the mission”

Gloria Pedregon, Manager  
La Mirada Vistas, La Mirada, California



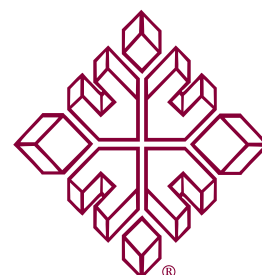
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Arlene Lacayo, Assistant Corporate Secretary  
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