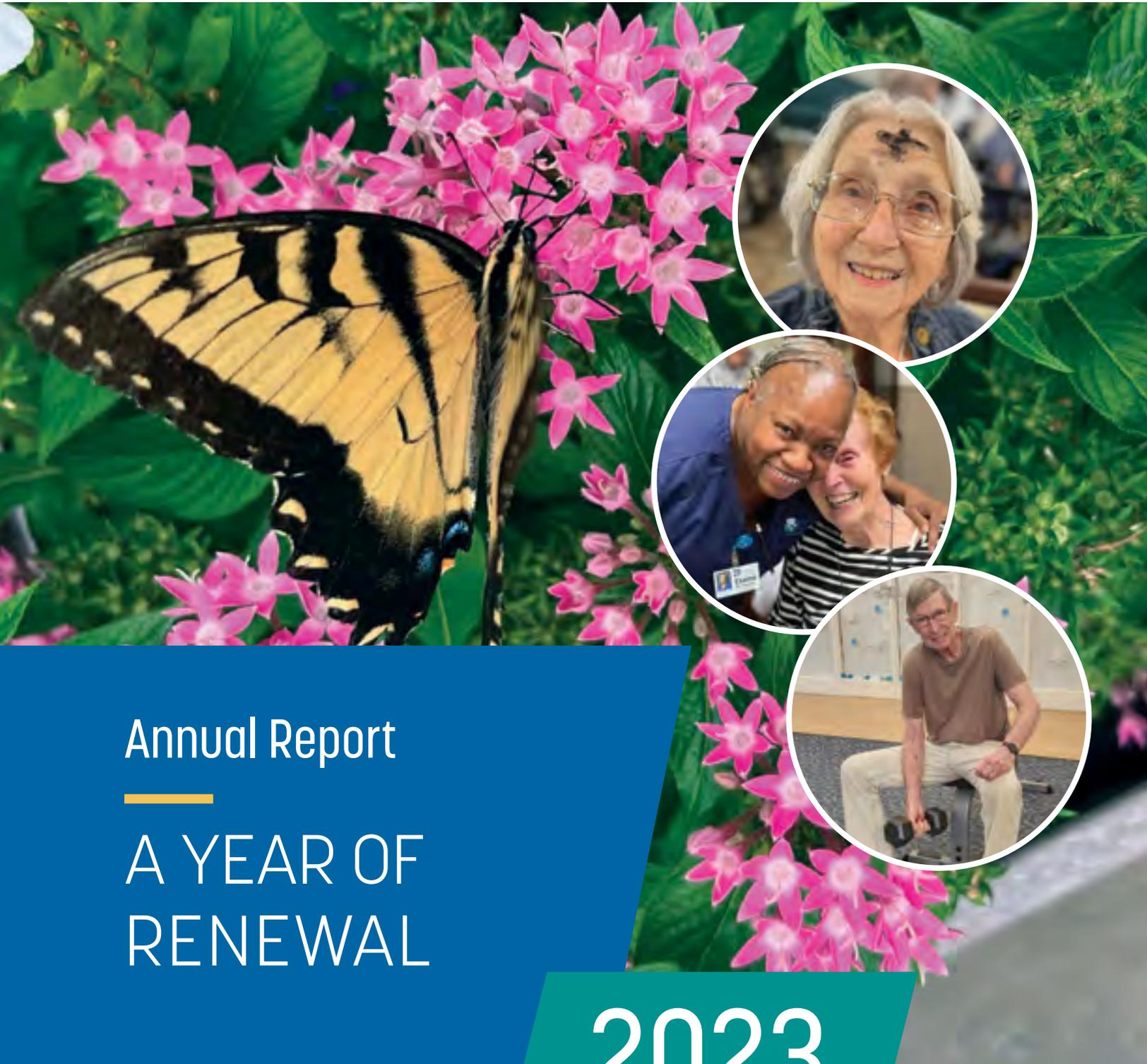




Lutheran Homes
of South Carolina

promoting the well-being of older adults



Annual Report



A YEAR OF
RENEWAL

2023

A Year of Renewal

Frank Shepke, President and CEO



What a wild ride we have been on at Lutheran Homes, especially navigating the significant challenges posed by the COVID-19 pandemic over the past three years. As we reflect on the past fiscal year, there's a renewed sense of optimism and hope as we begin to see glimpses of normalcy returning to our lives.

In this past fiscal year, we continued our major "building for the future" initiative by expanding our RoseCrest and the Heritage at Lowman campuses with our award-winning Courtyard Pocket Neighborhoods. These additions resonate with a new generation of seniors with an enriched lifestyle and a sense of community.

We also saw exceptional performance in regrowing our census across our ministry that resulted in improved financial results that help to solidify our future and our mission to promote the well-being of older adults.

Our Five to Thrive (5TT) customer satisfaction program continues to be a wonderful opportunity for our TeamMates to shine. The employees of the month, quarter and of the year (who is featured in this annual report) continued to go above and beyond to help

those in our service and those in need. We are fortunate to have such dedicated men and women that embody the mission of Lutheran Homes in their work.

Of course, there are always challenges, and the impact of the economy was one such that necessitated some higher than normal rate increases which was very unfortunate. Through the dedication of our team, we overcame many of these challenges by working together to keep our focus strong and our spirits high. Nothing in life is ever perfect, nor are we, but every day brings a new chance for improvement.

A special thank you goes to our visionary Board of Directors, exceptional leaders, teammates, and, most importantly, our beloved Priorities, who are the reason for why we exist. As a ministry of care and a part of the Evangelical Lutheran Church in America, Christian values guide us in all our endeavors, and we are truly blessed to have the opportunity to make a difference in the lives of others.

May our dear Lord bless and keep you for all of your days!

From the Board of Directors

Jack Balling, Chair, Board of Directors



On behalf of the Board of Directors, I want to express our gratitude to all of our TeamMates for their efforts to make Lutheran Homes of SC the best experience for our resident, client and patient Priorities. Lutheran Homes continues to provide the highest quality residential and healthcare services to those we serve.

In the ever-competitive field of senior living and healthcare, Lutheran Homes has proven to be a leader in the industry. While for-profit corporate entities operate and purchase existing facilities, home and community-based programs to seek profits, Lutheran Homes

remains committed to a kind and caring ministry for older adults. Of course, recent inflationary times have still resulted in tough operational financial decisions. The future is bright as our leadership team continues to plan, with the full commitment of our entire Board, for the future of senior living and healthcare in South Carolina.

We invite you to visit our communities and programs to explore the array of residential and healthcare options available in your area. We are confident that you will be pleasantly surprised by what you discover and experience.



Operations

LHSC oversees the operation of five-licensed Continuing Care Communities (CCRC), also known as Life Plan Communities with 417 independent living home and apartments, 192 assisted living units, 57 assisted living memory support units and 343 skilled nursing beds. Home and Community-based Services include a multi-county hospice program, a non-medical home services (NMHS) program, and a statewide Continuing Care at Home (CCAH) program.

Total Priorities Served in FY 2023: 3,248

Continuing Care Retirement Communities 2,409 Priorities

- the Heritage at Lowman: 684 Priorities
- Franke at Seaside: 522 Priorities
- Rice Estate: 583 Priorities
- RoseCrest: 523 Priorities
- Trinity on Laurens: 97 Priorities

Home and Community-based Services 839 Priorities

- Lutheran Hospice: 538 Priorities and 1,614 Families
- BeWell Home Services: 161 Priorities
- BeWell@Home: 140 Priorities

Age

- Average age at admission is 80.5 years
- The youngest resident served was 37 years and the eldest was 106 years

Ethnicity

- American Indian, Alaska Native, Asian, Hispanic or Latino, Native Hawaiian; Other Pacific Islander, Unknown: 5%
- White: 76%
- Black or African American: 19%



CCRCs

- 1 Franke at Seaside - Mt. Pleasant
- 2 the Heritage at Lowman - Chapin
- 3 Rice Estate - Columbia
- 4 RoseCrest - Inman
- 5 Trinity on Laurens - Aiken

Programs and Services

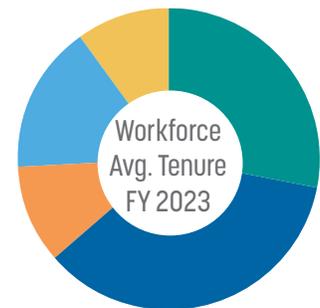
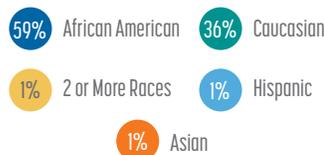
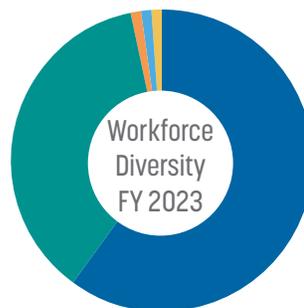
- Upstate, Midlands, Lowcountry
- 6 BeWell Home Services
- 7 Lutheran Hospice
- 8 BeWell@Home - Statewide

Human Resources

With a range spanning from our youngest TeamMate at 16 to our oldest at 88, our team embodies a diverse array of experiences, perspectives, and unique strengths. This diversity serves as a catalyst for fostering innovation, creativity, and inclusivity throughout our organization.

In FY 2023 our workforce comprised:

- 898 hourly TeamMates including PRN status
- 97 exempt or management leaders
- 86% Female and 14% Male



Mission and Philosophy

Believing in the presence of God, the value of human life and the dignity of the individual, the mission of Lutheran Homes of South Carolina, Inc. as a ministry of the church, is to promote the well-being of older adults by providing residential, health care and hospice services.

Vision Statement

As a ministry built on trust, Lutheran Homes of South Carolina will be:

- The premier provider of quality residential, health care and hospice services for older adults in South Carolina;
- A model for innovation and compassionate care provided by our caring, professional and competent staff;
- Committed to respecting and valuing our teammates and our partnership in this ministry;
- Respectful of the dignity and worth of the individual;
- Financially strong due to disciplined operational and financial management and control, combined with the continued growth of the LHSC Foundation;
- Effective in the use of our endowment to address the needs of our residents, patients, clients, communities and services;
- Effective and disciplined in development of strategies that are responsive to the needs of the community;
- Committed to providing facilities and services that are efficiently and thoughtfully designed to meet the needs of the community.

Values



Ministry

LHSC is a ministry of the South Carolina Synod of the Evangelical Lutheran Church in America. We demonstrate our faithfulness through the provision of programs and services that reflect our Christian heritage and commitment to holistic care for people of all faiths and beliefs.



Respect

We value and respect our Priorities (residents, patients, clients and their families), our TeamMates (employees, volunteers), donors and other partners.



Integrity

We adhere to our values and are honest and ethical in all communications and actions.



Accountability

We accept our fiduciary and stewardship responsibilities. We efficiently manage resources of LHSC in order to be a financially strong organization. We utilize measurable outcomes and a system for reporting of progress toward goals attainment. We comply with all laws, rules and regulations and promote a quality living and work environment.



Commitment to TeamMates (Employees)

LHSC commits to provide its TeamMates a safe working environment, competitive compensation, opportunities for training and development, and the leadership to achieve LHSC's mission and vision for the future.



Person-Centered Focus

LHSC offers a continuum of care and services focused on the individual needs of our Priorities (residents, patients, clients and their families).



Quality

Our commitment is to continuously improve quality through processes that support the delivery of our care and services through teamwork, staff development and empowerment of our TeamMates.



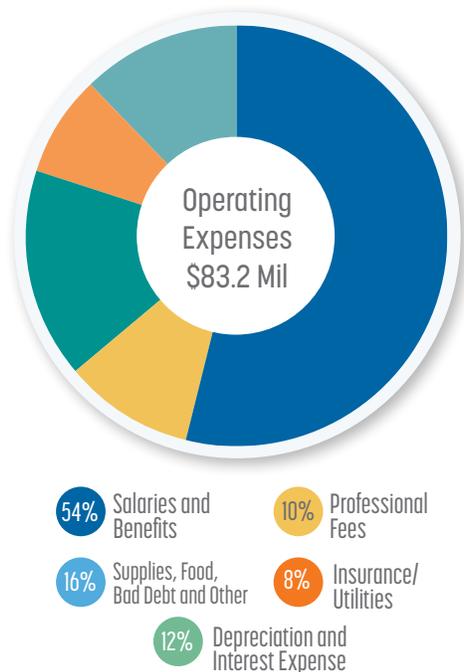
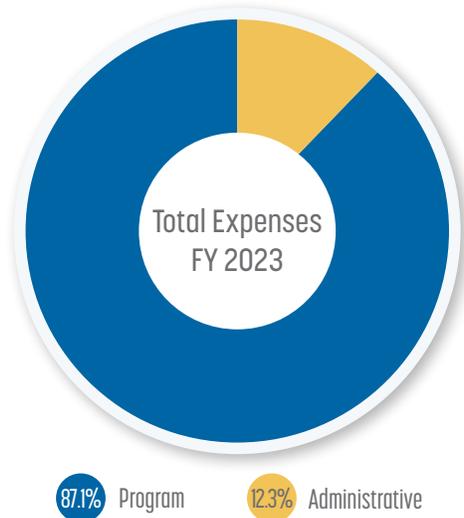
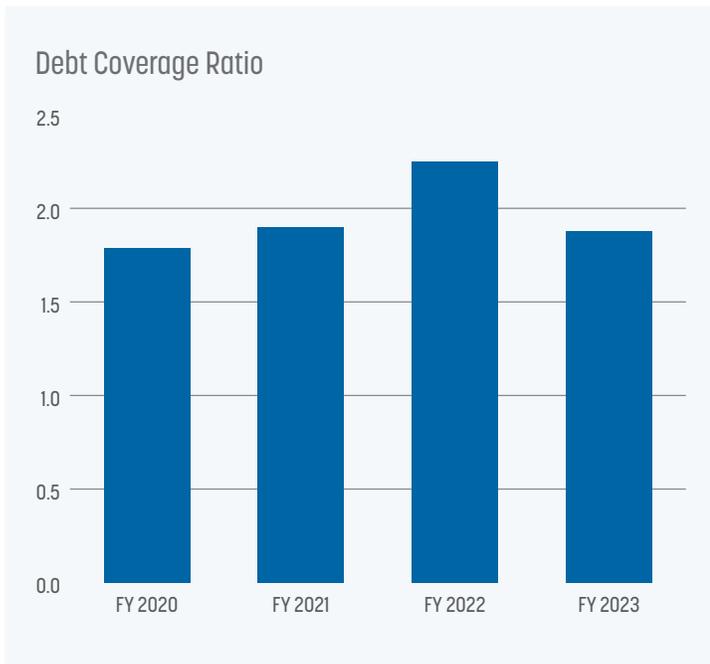
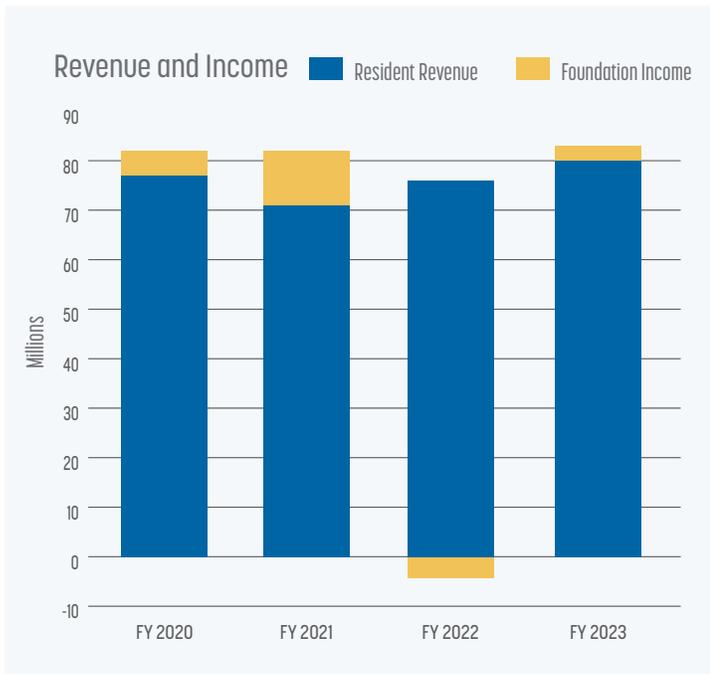
Strategic Market Focus

LHSC utilizes a disciplined strategic management process to implement planned development strategies based on current and future needs of our target populations.

Financial Overview

In Fiscal Year 2023, Lutheran Homes of South Carolina faced challenges amidst ongoing economic uncertainty, which brought about significant inflationary pressures weighing heavily on all senior living providers. A strategic mid-year decision to implement modest rate increases across all business lines proved crucial in ensuring the sustained delivery of quality services and amenities for our residents, patients, and clients. Improved skilled nursing census indicated a positive road towards recovery.

Our hospice and non-medical homecare services expanded, further advancing our mission. Construction progressed in four new additional Courtyard Apartment buildings, with two located at both RoseCrest and the Heritage at Lowman. This, along with other renovations at all locations, are expected to contribute to the organization's future financial success. Overall, we maintained strong liquidity for the year, which, enabled a proactive focus to maintain our quality standards and fulfill current obligations. We ended the year financially strong, healthy, and ready for continual renewal.



*Consolidated financial statements audited by independent certified public accountants. The audit report can be obtained by contacting the Chief Financial Officer.

How Are We Doing?

Annually, LHSC conducts surveys among resident Priorities, including family members, to gauge their perceptions of various aspects of community life. These encompass staff performance, life enrichment activities, grounds and facilities, meals, direct care, and overall service quality. These surveys serve as a valuable tool for identifying areas for enhancement and acknowledging achievements. Notably, two questions stood out in garnering exceptionally positive feedback from LHSC residents and families:

1. Would you recommend Lutheran Homes of SC to others? **91.19%**
2. What is your overall satisfaction with Lutheran Homes of SC? **90.42%**

LHSC Priorities and families share their positive feedback:

the Heritage at Lowman

"I find that this is a great place for me to be—where I know there is help for me when needed."

RoseCrest

"Staff is very attentive and responsive. This is the best facility that I have engaged with."

Rice Estate

"We are very happy. My husband and I love it here. Staff are excellent, food is excellent, and activities are excellent."

Franke at Seaside

"My decision to sell my home of 55 years was tough, but moving to Franke was the right thing to do and I enjoy the carefree lifestyle."

Trinity on Laurens

"I speak highly of Trinity around town."

BeWell Home Services

"has changed my life I felt confined, now I feel free."

BeWell@Home

"We feel very fortunate that we have access to BeWell@Home's caring staff."

Lutheran Hospice families share their positive feedback:

Lutheran Hospice

"The Hospice care was a Godsend for us. They came often and took excellent, kind, warm care of Joe."

Lutheran Hospice consistently scored higher than the State and National averages in all 8 criteria measured by the U.S. Centers for Medicare & Medicaid Services.

Lutheran Hospice

National Avg.

92.6% | 86.1%

Willingness to Recommend



Home and Community-Based Services

BeWell@Home | Every Step of the Way

Katharine Hassell, wellness coordinator for BeWell@Home, serves as an advocate for members. Kathy Haney, a BeWell@Home member for over five years, shares her story about the impact of Katharine and the program during her life.

A former English Professor at the College of Charleston for 26 years, Kathy attended a presentation with friends. "I signed up before I left the presentation. It was a no brainer," she said.

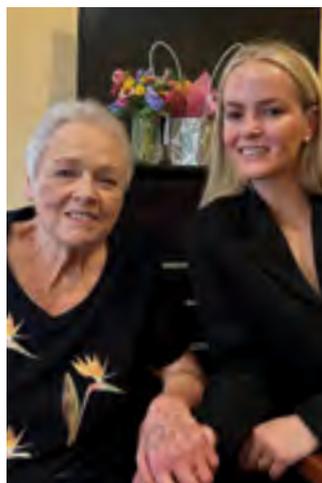
Katharine has been Kathy's wellness coordinator for over three years noting, "I'm Kathy's advocate and I take that role very seriously." Kathy first found invaluable support from BeWell@Home after her second knee replacement. She credits Katharine, for providing assistance with care so she could remain at home. "I was never left alone until I told them I felt ready. They took care of

everything." Kathy explained.

Kathy loved traveling and visited over 65 countries. Last year, Kathy took an African safari, where she witnessed the "Big Five" - lion, leopard, rhino, elephant, and African buffalo, a truly rare and magnificent experience. However, her adventure took a tragic turn when she injured her toe boarding a small bush plane, leading to a life-threatening infection.

Upon returning home, Kathy's health rapidly declined, despite medical attention. Katharine arranged for caregivers to help at home. Unfortunately, Kathy's condition worsened, causing spinal damage which impaired her mobility. Using

her emergency alert button provided by BeWell@Home, Kathy called emergency medical services. She fought for her life over the next year, with Katharine coordinating her care. Eventually, Kathy was admitted to Franke at Seaside's Keil Health Center.



Kathy worked to establish a new normal with Katharine and BeWell@Home's support. Sadly, she passed away shortly after agreeing to share her story. We honor her memory by sharing her journey and her gratitude for Katharine and BeWell@

Home's support. "Katharine is and has been my guardian angel. The BeWell Program has been with me every step of the way. She has been my voice."

Lutheran Hospice | Lutheran Hospice A Family's Journey

Lutheran Homes holds a significant place in Tammy Cashion's family history, dating back to the 1970s when her mother worked as a certified nursing assistant at Lowman Home's infirmary and the Taylor building. Tammy's parents even married in the Lowman Home chapel, with residents attending their reception. These memories resonate with Tammy as she continues to cherish her family's connection to Lowman.



Forward to 2022 as Tammy embraced a

career change by joining Lutheran Hospice – Midlands as a Community Outreach Director. Despite her aversion to change, Tammy recognized it as a divine opportunity for personal growth, important for her well-being and happiness, notes, "Lutheran Hospice was a perfect fit."

Soon after witnessing her uncle's struggle as a caregiver for her ailing aunt, Tammy's mother recommended Lutheran Hospice.

Despite initial reluctance, her uncle eventually accepted hospice care, soon acknowledging its significant improvement in both their lives.

Both of Tammy's parents and her uncle are veterans, and Tammy is grateful to play a part in Lutheran Hospice's 'We Honor Veterans' program. She reflects, "Every time we recognize a vet for their service, I think about my family, and I know we would also honor them." As both a staff member and a family member, Tammy takes pride in being part of Lutheran Homes. She admires the dedication of the Lutheran Hospice team, emphasizing their compassion and commitment to providing the best care for their patients.

Scan the QR code or [click here to watch Tammy's video.](#)



BeWell Home Services | The Extra Mile

In 2006, Elinor Varndell and her husband transitioned to Franke at Seaside, finding comfort as their needs evolved. After facing a health setback that required round-the-clock care, Elinor became a client of BeWell Home Services. Witnessing Elinor's joy in their care, her daughter Carolyn continued relying on BeWell caregivers for her mother's companionship. "I always knew she would be in good hands," Carolyn shared, delighted to see Elinor socializing on campus with her caregiver, engaging in activities like visiting the ducks or enjoying shopping sprees.

Elinor's love for holidays, especially



Christmas, was profound. She and Carolyn shared a tradition of decorating their home with festive ornaments, keeping the spirit of the season alive throughout the year. Sandra Edwards, CNA, recalls Elinor's fondness for milkshakes and candy, highlighting the joy she brought to others through her festive displays and treats.

Latarsha Horlback, CNA, fondly reminisces about a day when Elinor expressed a longing to visit her hometown of Laurens, SC. Although Elinor was unable to make the three-hour trip, Latarsha creatively orchestrated a memorable adventure, strolling through the Franke campus

and nearby attractions. Grateful for the experience, Elinor expressed her appreciation, cherishing the trip.

A cherished memory for Carolyn was during her shoe store's anniversary party, when BeWell caregivers surprised Elinor with an outing to join the festivities, exemplifying their commitment to going the extra mile. Carolyn continues her mother's legacy by spreading cheer around the Franke campus and ensuring residents enjoy stylish sneakers reminiscent of Elinor's flair.

Carolyn's daily campus visits were supplemented by the unwavering support of the BeWell team, providing Elinor with love and companionship. "It really afforded her a great quality of life," reflected Carolyn, grateful for the compassionate care her mother received.

Continuing Care Retirement Communities

Rice Estate | Fluttering Dreams

In the heart of Rice Estate, amidst the serene ambiance of the Rice Main Courtyard, 2023 witnessed a remarkable transformation – the birth of a vibrant and enchanting butterfly garden. This endeavor was not the work of a single individual, but rather a collective effort led by a dedicated group of resident Priorities, volunteers, and TeamMates who joined forces to form the newly created Garden Club. United by a shared vision to enhance their surroundings, the community rallied together with unwavering enthusiasm and a commitment to create something truly special.

Fueled by their passion for gardening, the Garden Club members embarked on a journey to breathe new life into the courtyard. Armed with shovels,

pots, and an array of vibrant flowers, they worked tirelessly to bring their vision to fruition. Each member brought their unique skills and ideas to the table, resulting in a kaleidoscope of colors that transformed the courtyard into a haven of natural beauty.

As the butterfly garden blossomed, it became a focal point of joy and inspiration for all who visited Rice Estate. The delicate flutter of butterflies among the blossoms adds a magical touch to the serene surroundings, captivating the hearts of Priorities and visitors alike. More than just a visual

delight, the garden served as a symbol of the community's collaborative spirit and creativity, showcasing what can be achieved when individuals come together with a common purpose.

The success of the butterfly garden not only brought pride to the members of the Garden Club but also served as a testament to the power of community and the transformative impact of collective action. It stood as a reminder that, by working together, we can create beauty, foster connection, and make a meaningful difference in the world around us.



RoseCrest | Art4Life

RoseCrest is among the hundred nursing homes selected to partake in Art4Life, a transformative program tapping into the therapeutic power of art to enrich lives and nourish the soul. Tennessee Technological University's Whitson-Hester School of Nursing and grant funding from the Centers for Medicare & Medicaid Services in partnership with the Tennessee Department of Health & the Tennessee State Agency and the South Carolina Department of Health & Environmental Control make the Art4Life Program State-wide Initiative possible.



The free program provides staff training to ensure that the program caters to the unique needs of each individual. Using an array of art materials, the program is a combination of listening, learning and a hands-on approach in how to start and sustain a successful art program that greatly differs from art and crafts.

Rodeshia Williams, RoseCrest's Life Enrichment Director, witnessed the power of Art4Life remarking, "The program is amazing. The residents and staff alike learn new things about art."

A once hesitant participant, Ms. Lee found herself drawn into the vibrant world of creativity. After a group discussion themed "A Day at the Beach", something within her stirred and her brush really started to paint. She is eager to join weekly Art4Life sessions. Rodeshia notes, "She enjoys looking at different kinds of artwork, and she's a great artist. She expresses how happy she is after the sessions."

With each masterpiece created a sense of autonomy and empowerment flourishes. Art4Life is a testament to the power of art to heal, inspire, and transform lives one brushstroke at a time. Ms. Lee's painting of a tranquil beach scene serves as a reminder of the journey from doubt to discovery, guided by the gentle hand of creativity.

Franke at Seaside | A Return of the Holiday Gala

Resident Priorities, families, teammates, and guests eagerly anticipated the return of the elegant "Franke Holiday Gala," a cherished tradition before the onset of the COVID-19 pandemic, which shut down the world. After two years of deliberately more casual yet delightful outdoor holiday celebrations, it was time to return to the apex and reclaim the grandeur of the event.

Starting in early fall, Executive Director Sandy Stoll worked with her amazing culinary, life enrichment, administrative, and physical plant teams to create a magical evening filled with amazing décor, musical performances, incredible cuisine, and joy.

Beginning just before Thanksgiving, Bryan Muckenfuss's physical plant team decorated the entire Franke campus with bright holiday lights,

hired horse-drawn carriages and children's entertainment, and planned for parking, security, safety, and any other contingency.

Under the guidance of Cindy Somers, the Life Enrichment team curated multiple musical performances, family and individual activities, and infused the atmosphere with festive spirit and holiday cheer throughout the campus. Even Santa Claus himself made an appearance, bringing joy and excitement to believers of all ages.

Last, but not least, Franke's extraordinary culinary team, headed by Chefs

Ted Jackson and Rushekia Manigault, worked to prepare an amazing assortment of dishes for all levels of care. Delicious appetizers, prime rib, seafood and dessert bars, specialty cocktails and cocoa galore. A special treat was

Chef Ted's wonderful *Buche de Noël* or Christmas Cake.

This hallmark experience exemplifies the standard of excellence Franke has been renowned for over the years.

That night, and the morning after, accolades were quick to come from both new and longtime residents and their guests. The Gala was a resounding success, fostering a sense of an invigorating, yet comforting family reunion across the entire campus.



Trinity on Laurens | Pawsitively Pawsome Pups



Monthly volunteer visits from Alliance of Therapy Dogs, bring immeasurable benefits to Trinity's resident Priorities.

These loving pups, often dressed in holiday costumes never fail to lift spirits and bring smiles among the Priorities and staff alike. Each dog, coming in all shapes and sizes, becomes a favorite to someone.

The dogs are more than just furry companions; they receive special training to provide comfort and affection. Handlers and volunteers work closely with the dogs to encourage appropriate behavior and adherence to health and safety protocols to support the well-being of both the residents and the pups.

The dogs' impact on mental health is profound. Transcending language barriers and cognitive limitations, they help alleviate feelings of loneliness and

isolation; reduce stress, anxiety, and depression that often can be prevalent among older adults. They have an innate ability to evoke fond memories, and spark conversations, and foster a sense of community and belonging.

The physical health benefits of interacting with therapy dogs is healing for both the mind and body. During visits, Priorities often engage in activities like walking or playing with the dogs, which promotes physical activity and may help improve high blood pressure and overall cardiovascular health.

Through their visits and therapeutic effects, these positively awesome pups provide unconditional love and joy to support those who need it most.

the Heritage at Lowman | Always Know You Have a Purpose

Growing up in a challenging environment with teasing brothers, Ms. Dorothy Minick recalls a lifetime of anger and irritability. However, her perspective shifted during her time at the Rehabilitation and Healthcare Center. As she lay in bed contemplating her existence at 95 years old, she shared with Pastor Sue Johnson, that she found her purpose in a seemingly simple yet powerful act "to make people smile and have a better day."

Despite physical limitations at age 95, Ms. Minick recognized the impact of her genuine smile on others. She understood that, while she couldn't do many things, bringing joy to people's lives through a warm smile became her mission.

The ripple effect was profound, as people reciprocated her positivity. Her interaction with a new resident

highlights the transformative power of kindness. By consistently sharing her radiant smile, she eventually broke through the barriers of a resident Priority who had not smiled in months, fostering connection and conversation. Her simple yet powerful message, "SMILE," resonates as a reminder of the positive change that a small act of kindness can bring to someone's day.

Ms. Minick's humility and conviction in acknowledging her purpose shine through when she's encouraged to share her story. Her response, "Well, this is just further confirmation that I am doing the right thing in following my purpose," reflects a deep understanding of the significance of her actions and the positive impact she has on others.

Ms. Minick's story is a beacon of hope, encouraging everyone to reflect on



their own purpose and the positive contributions they can make, no matter their age or life circumstances. Everyone has a purpose, and it's never too late to discover and embrace it.

High Five Club

TeamMates of the Quarter and TeamMate of the Year



The Five to Thrive (5TT) initiative promotes excellence in customer service and TeamMate appreciation. Through the

5TT High Five Club, Priorities—resi-

dents, patients, and clients—have the opportunity to commend TeamMates who exceed expectations. A three-point nomination and review process grants monthly, quarterly, and annual TeamMate recognitions. Winners are

announced at special 5TT celebrations in their workplace and receive Points of Praise (POP Points), redeemable for Amazon gifts. By prioritizing meaningful interactions, the endeavor fosters a culture of appreciation and service excellence.

2023 LHSC TeamMates of the Quarter - 500 POP Points

1st Quarter: Kris Pierce, RoseCrest Human Resource Director

2nd Quarter: Phillip Perez, Franke at Seaside Lead Culinary Aide

3rd Quarter: Tammy Cashion, Community Outreach Director & Elizabeth Caulder, Volunteer Manager Lutheran Hospice – Midlands

4th Quarter: Tim Clark, Rice Estate Life Enrichment Assistant



2023 LHSC TeamMate of the Year | 2500 POP Points

Tim Clark, Rice Estate, Life Enrichment Assistant



Tim Clark is truly one of a kind when it comes to his generosity, compassion, and overall ability to bring happiness to Rice Estate's Priorities and TeamMates. Tim is reliable, trustworthy, and a hard worker. He consistently goes above and beyond to ensure our community shines brightly.

Tim often comes in after hours, on his own time, to put up amazing displays on the front lawns of the Rice campus. Not only does he

donate his personal time off the clock, but he also brings his own supplies and equipment when organizing these incredible seasonal displays. For Christmas, he always decorates the Arbor front lawn with a beautiful Nativity scene and Christmas lights to illuminate it at night. Tim also enjoys getting into character for fun events throughout the year—including stints as Santa, a mime at Rice's Evening in Paris event, and entertaining everyone at the Fall Festival as a friendly Scarecrow.





Lutheran Homes
of South Carolina
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