



# MEADOWOOD

SENIOR LIVING

## Growing a Legacy

*Annual Report 2019*



*\*an illustration of how a planned gift could grow in 60 years*

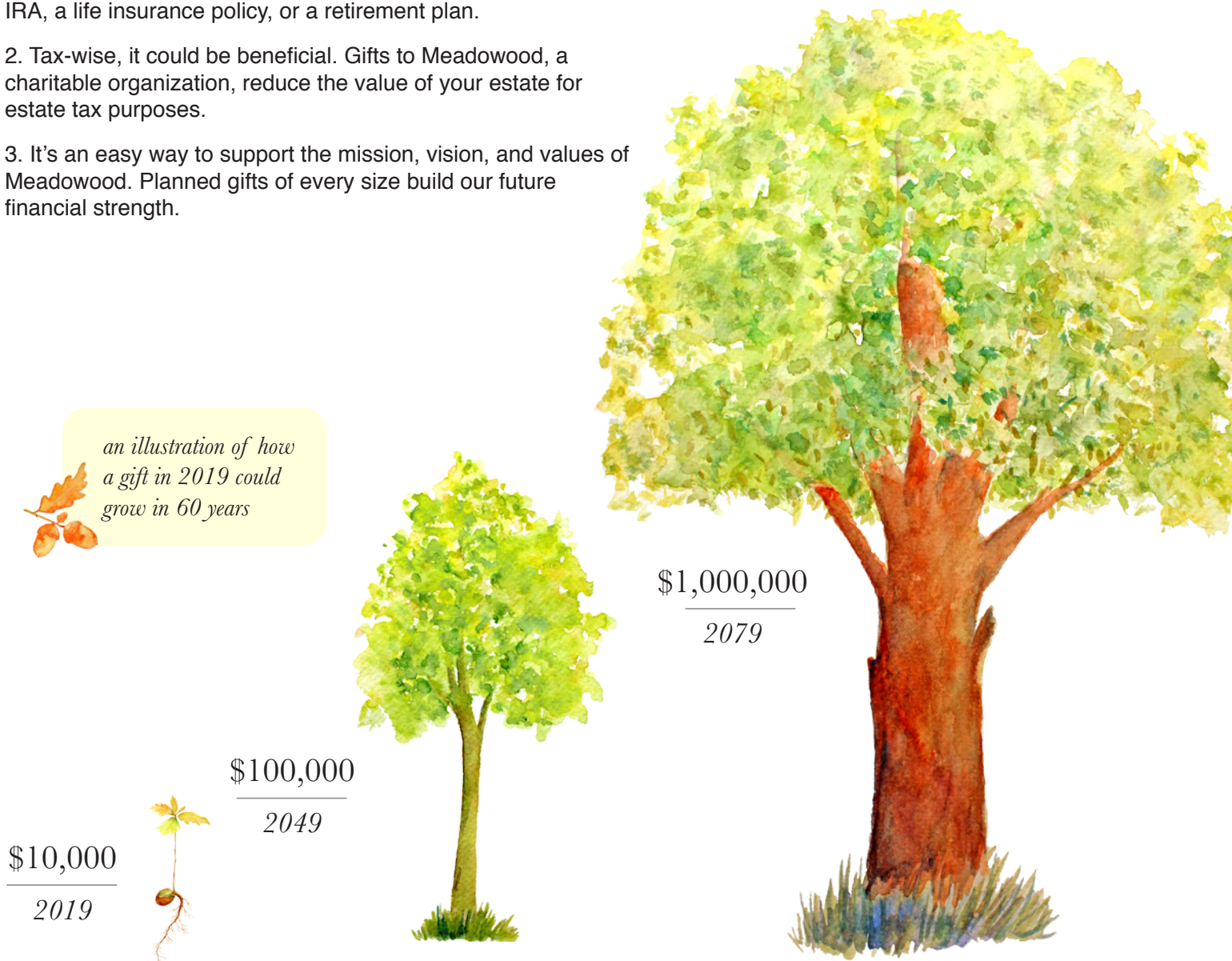
# Growing a Legacy

Throughout our history, philanthropy has played an essential role in helping our community grow and thrive. We are appreciative of the many generous cash gifts from residents throughout the years, which have helped to finance many improvements in our community. In 2019, we launched a program to develop estate gifts from residents to serve future needs for Meadowood. When making an estate gift, there is no cash required. When a resident leaves a portion of remaining assets for Meadowood's future needs, it makes a sizeable impact. We have already received commitments in writing from a number of residents, who remain confidential in our records. By notifying us of their charitable intentions, such as naming us in a will or as a beneficiary of a retirement plan, we are able to thank them and invite them to become a member of the Meadowood Legacy Society.

Our goal is to grow this program in 2020. By making a simple gift that requires no cash during your lifetime, you can make a significant difference in supporting the Meadowood mission and sustaining its high-quality senior living spaces and programs for many more years.

## Why Make a Planned Gift?

1. It's simple to do. It can be as easy as adding language to your will or naming Meadowood a beneficiary to a charitable trust, an IRA, a life insurance policy, or a retirement plan.
2. Tax-wise, it could be beneficial. Gifts to Meadowood, a charitable organization, reduce the value of your estate for estate tax purposes.
3. It's an easy way to support the mission, vision, and values of Meadowood. Planned gifts of every size build our future financial strength.



# President's Message

## Dear Meadowood Family,

When reflecting on 2019, I feel inspired. Inspired by our founders' vision and all our supporters – whether it is through your time, expertise, or philanthropic support. The spirit and energy of our caring residents, compassionate staff, and dedicated Board members is palpable when walking on our campus.

With our mission and vision always guiding us, the Meadowood Board members, residents, and staff work together to plan for a successful future for our community. We have made and continue to make significant commitments to upgrade our campus and build quality programs that provide the highest quality of life for all who experience the Meadowood community. In the year 2019, we had many achievements for Meadowood to celebrate. Some of our more notable accomplishments include the following:

- Opened the first of four Grove buildings in December, with new residents moving in
- Completed the renovations in the terrace courtyards of Bluebird Crossing and Cardinal Crest
- Opened the new Victory Garden and the road crossing to the Victory Garden, "George Brown Memorial Parkway"
- Expanded the wellness program for residents and staff, including holding our first Turkey Trot
- Started the first two sections of the walking trail
- Enhanced safety measures, including installing the keyless entry system and adding security cameras around campus
- Began important study/design work through the Health Center Redesign Committee
- Honored longtime Board member Drake Williams at our annual Founders' Day celebration
- Cultivated the culture of philanthropy, raising \$438,000 in 2019
- Formalized our planned giving program and several residents notified us of their bequest intentions, allowing us to help build our future financial strength
- Once again held a successful Art Show and Fall Festival, raising money for our Benevolence Fund

The following Annual Report will testify to your incredible generosity and devotion to our community. Thank you for your continued support and commitment to Meadowood. These accomplishments would not be possible without you.

*Warm regards,*

**Paul Nordeman**  
President & CEO



## *Board of Directors*

Philanthropy is deeply rooted in our culture at Meadowood, starting with the founders providing the space for us to develop this community. Giving has played an essential role in making possible our achievements of the past and our plans for the future.

Philanthropy offers numerous possibilities for each of us to choose where we want to direct our giving. These include: the Benevolence Fund, special projects, such as the expansion and renovation of the Health Center and restoration of the Guest House, and capital campaigns – our first ever being the wellness pool and garden campaign. Examples of gifts we have received during the past year include \$1,200 for special holiday music for spiritual programming, \$100,000 for a permanent shade structure in the Stratton Family Wellness Garden, and \$1,000 for a bench near the Center Bridge entrance to the Schultz Community Center. All gifts, large and small, make an impact.

On behalf of the Board of Directors, I extend our gratitude to all the benefactors, including donors and volunteers recognized in this annual report, and to all donors who have given to Meadowood throughout the years. I urge you to continue your absolutely vital participation and invite others to join us in our effort to make Meadowood the best it can be.

The Board is ever mindful of what a privilege it is to serve our community of caring people, supported by such a competent, compassionate, and energetic staff. The Management Team and Board of Directors maintain a consistent vigilance over residents' welfare with a commitment to ensure that Meadowood continues to fulfill the worthy purpose declared in our mission statement.

Bruce J. McKenney, Chair  
Board of Directors



**Seated in picture from left to right:** Eugene Dolloff, Patricia Modafferi, H. Drake Williams, Jr., Bruce McKenney, Paul Nordeman  
**Standing in picture from left to right:** James Beam, Jeffrey Rieder, Jeremy Brenn, W. Bruce Fretz, Karen Kelly, Philip Albright  
**Missing from photo:** William Black, Lawrence Dessen, Lorraine Lee (MRA President), Barbara Ost, Ilene Warner-Maron



## *Residents Association*

All Meadowood residents are members of the Meadowood Residents Association (MRA), which was created to give residents a voice in community governance in partnership with management and the Board of Directors. The Resident Council consists of twelve elected members (five officers, the past president, and six members-at-large), which are the governing body of the MRA. The council meets monthly. It also holds three general meetings, called Stated meetings, each year – in January, May, and September. The MRA Council President serves as a non-voting member of the Meadowood Board and, in that capacity, works cooperatively with the Board itself.

The MRA enriches life in our community by having over 60 budgeted committees for programs and activities, which address the interests and educational needs of residents. Resident volunteers create, organize, and direct all of these activities, which include - but are not limited to - various arts and crafts, gardening, sports, trip opportunities, publications, chorus, entertainment programs, and study groups.

The MRA receives voluntary contributions from residents to fund these activities through its annual Spring Appeal, which also raises money for service awards for our graduating high school seniors. A second MRA appeal takes place in November. Funds collected are used to recognize the outstanding service Meadowood employees give to our residents throughout the year. These gifts are distributed at the employee holiday party in December.

Funds are also raised through the community-wide Fall Festival, which supports the Meadowood Benevolence Fund. Other activities that raise money for the Benevolence Fund and/or special projects approved by the Resident Council include the Gosling's Nest Gift Shop, Hidden Treasures Thrift Store, Beading, Crafts, Ceramics, and the Woodshop. In addition to volunteering on committees, residents show their neighborly values by volunteering in the Health Center to assist residents and patients. Their skills and time are greatly appreciated.

The MRA is an active partner in creating and evolving the lifestyle of our community. Residents of all ages use their talents and knowledge to make living at Meadowood a rich and fulfilling experience.

### **Lorraine Lee MRA President**



**Seated in picture from left to right:** Helene Bocclair, Lorraine Lee

**Standing in picture from left to right:** Nick Wanck, John Kratz, Don Falcone, Diane McGovern, Janet Kovacs, Sue Venart, Erik Nelson, Sue Lake, Dean Eayre, Barbara Nace

**Missing from photo:** Hugh Trumbull



# *Stewardship*

Thank you for entrusting Meadowood with your charitable gifts and enabling us to continue to enhance our mission to provide the highest quality of life for all who experience the Meadowood Community. We are able to grow our mission, thanks to your support and Meadowood's responsible planning and management of resources. Meadowood is proud to be a good steward of the contributions we receive, and we are truly grateful for your kindness.

Over the past five years, donors have generously contributed gifts and bequests of \$2.9 million to Meadowood, with \$438,000 of that total received in 2019. The benefits of these donations can be seen throughout our community in many caring ways.

**Benevolence Fund** – Donations have been designated to the Benevolence Fund throughout our history, which has allowed us to provide grants to 23 residents over the years who were no longer able to pay the full cost of their care. Grants of \$102,777 were awarded in 2019. The Benevolence Fund gives residents peace of mind in case they experience unexpected financial challenges or outlive their resources.

**Restricted Gifts** – Your restricted gifts enhanced many programs and areas on campus, demonstrating your commitment in helping to make Meadowood such an inspiring community. Several gifts of time and money continue to be used to improve the Nature Preserve, including working towards our goal of planting 500 trees in 5 years. Other restricted contributions went towards a walking path, providing residents and employees with a safer alternative than walking on perimeter road. All who utilize this path will experience several dimensions of wellness, providing the benefits of physical exercise while enjoying the beauty of nature.

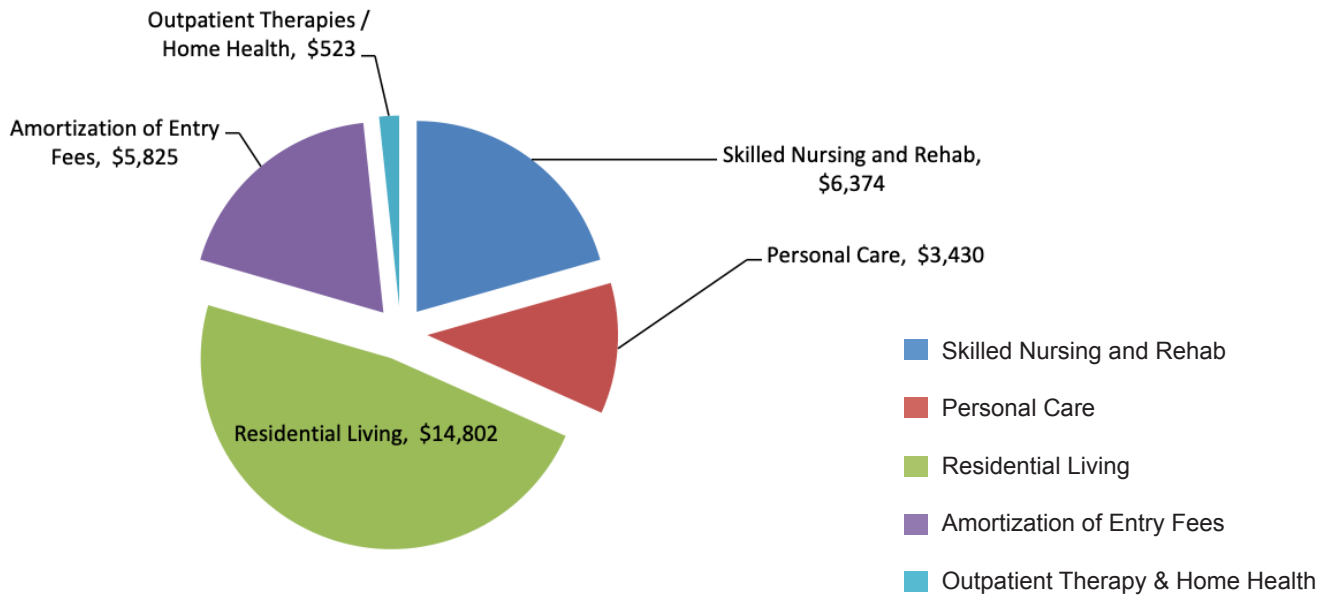
Another sizeable gift was restricted for a permanent outdoor shade structure in the Stratton Family Wellness Garden. This will help enhance programming in the picturesque garden, as we will be able to hold events in the rain and bright sun. The shade structure will help residents and staff utilize this beautiful space more often. One contribution was designated for a bench outside of the Center Bridge entrance to Schultz Community Center. Yet other thoughtful donations went towards spiritual wellness: resources for the Chaplain's Program and building the Meadowood ministry, including special music for holidays. We are thankful for our donors' many interests that inspire programs and enhancements throughout our community.

**Area of Greatest Need** – Some donations were unrestricted, allowing us to expand current programs, initiate new ones when needed, and assist in our progress to achieve our stated vision. All of these donations contribute to our mission and enriching our residents' lives.

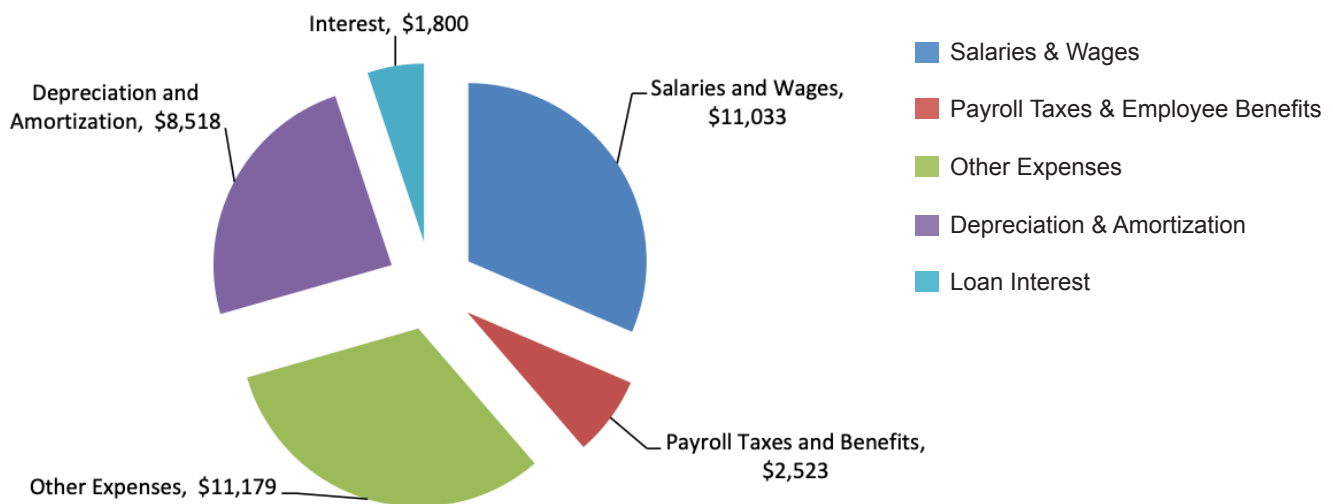


# FINANCIAL STRENGTH & HIGHLIGHTS

## 2019 REVENUES



## 2019 EXPENSES



\*numbers are in thousands





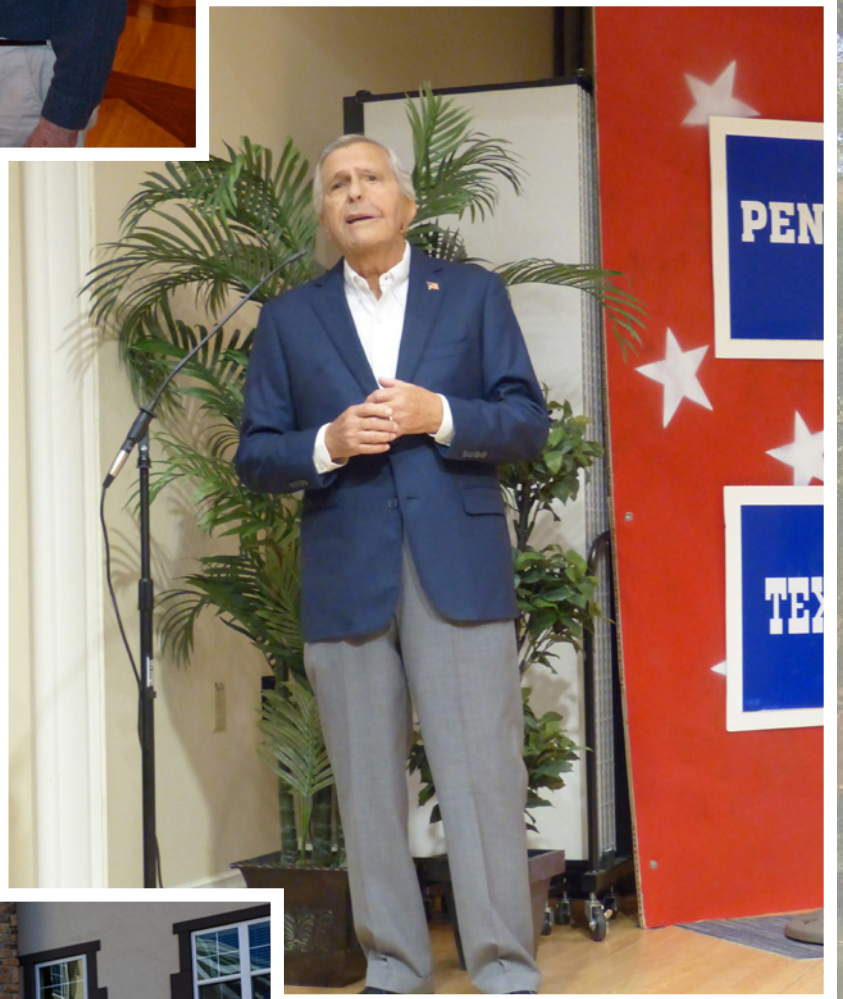
Society grows great trees in whose shade we never sit.







at when we plant  
e we know we shall  
*based on a Greek proverb*



# THE MISSION OF MEADOWOOD

*Provide the highest quality of life for all who experience the Meadowood Community.*



## *Core Values*

In response to its mission, Meadowood pursues the following values:

- Service excellence and the highest quality healthcare in a secure and comfortable environment
- Maximum personal independence and wellness through a wide variety of choices
- Financial strength to ensure long-term success as a self-sustaining, stand-alone senior living community
- Board, staff, and residents working in harmony
- High moral and ethical standards

*-Adopted by the Board of Directors on January 27, 2014*



# PRESIDENT'S CIRCLE

*Meadowood recognizes and appreciates the philanthropic spirit of members of the President's Circle who have made gifts in the amount of \$1,000 or more in 2019.*

Philip & Barbara Albright  
Paul & Grayce Anderson  
Anonymous (6)  
Baker Tilly Virchow Krause, LLP  
Walt & Judy Barnes  
Daniel Bell\*  
Benchmark Construction  
Benevity Community Impact Fund  
Berks Ridge Company Enterprises  
Hubie Bishop  
William & Karen Black  
Helene B. Bocclair  
John & Joan Bown  
Jean Brown  
Joan Brucker  
Citizens Bank  
Contract Pharmacy Services  
Copernicus Society of America  
Gene & Fran Coughlin  
William Davison  
James & Antoinette Deever  
James Deysner  
Eugene Dolloff  
Dean Eayre  
John & Patricia Emery  
Eventus Strategic Partners  
Don & Sheila Falcone  
Paul Felton  
Martha Fickett  
Ann Frankhouse  
Sarah Frederick  
Thomas & Cecilia Friend  
Al & Barbara Gabriele  
Dominic (Tom) & Gloria Genuardi  
Janice Greenberg  
Robert & Dianne Greer  
Charles Hagelin  
Sidnie Harris  
The Haverford Trust Company

Donald & Lois Howland  
June Huebner  
I.T. Landes & Sons  
Johnson, Kendall & Johnson  
Judy Jones  
Heike Kilgore  
Hugh & Mary Maher  
Robert McCammon  
McCloskey & Faber, PC  
Doreen McGettigan  
Dorothy McHale  
Bruce & Jeanne McKenney  
Lew\* & Arlene McLean  
Gene & Pat Miesse  
Meadowood Residents Association  
Gretchen Murray  
Charles Neiderhiser\*  
Erik & Helen Nelson  
Jeffrey & Barbara Ost  
Pavone Marketing Group/Varsity Branding  
Doris Peck  
Pennsylvania Horticultural Society  
Piper Sandler  
Rita Precopio  
RLPS Architects  
The Schiel Family Foundation  
Thomas Seaman  
Robert & Theresa Sherman  
Melanie Trilling  
Hugh & Ann Trumbull  
Unidine  
Nick & Maryland Wanck  
Shirley Watson  
Robert & Katherine Weibel  
H. Drake Williams, Jr.  
Woodrow & Associates

\*Deceased



*Members of the  
2018 President's  
Circle*



## 2019 Donors

Meadowood gratefully acknowledges the following donors who made gifts between January 1, 2019 and December 31, 2019. Thank you for your generosity and support.

### *Gifts of \$10,000 or more*

Paul & Grayce Anderson  
Walt & Judy Barnes  
John & Joan Bown  
Copernicus Society of America  
Meadowood Residents Association  
Doris Peck  
The Schiel Family Foundation  
Shirley Watson

### *Gifts of \$5,000 - \$9,999*

Philip & Barbara Albright  
John & Patricia Emery  
Dominic (Tom) & Gloria Genuardi  
Lew\* & Arlene McLean  
Melanie Trilling  
Unidine

### *Gifts of \$1,000 - \$4,999*

Anonymous (6)  
Baker Tilly Virchow Krause, LLP  
Daniel Bell\*  
Benchmark Construction  
Benevity Community Impact Fund  
Berks Ridge Company Enterprises  
Hubie Bishop  
William & Karen Black  
Helene B. Boclair  
Jean Brown  
Joan Brucker  
Citizens Bank  
Contract Pharmacy Services  
Gene & Fran Coughlin  
William Davison  
James & Antoinette Deever  
James Deysner  
Eugene Dolloff  
Dean Eayre  
Eventus Strategic Partners  
Don & Sheila Falcone  
Paul Felton  
Martha Fickett  
Ann Frankhouse  
Sarah Frederick  
Thomas & Cecilia Friend

Al & Barbara Gabriele  
Janice Greenberg  
Robert & Dianne Greer  
Charles Hagelin  
Sidnie Harris  
The Haverford Trust Company  
Donald & Lois Howland  
June Huebner  
I.T. Landes & Sons  
Johnson, Kendall & Johnson  
Judy Jones  
Heike Kilgore  
Hugh & Mary Maher  
Robert McCammon  
McCloskey & Faber, PC  
Doreen McGettigan  
Dorothy McHale  
Bruce & Jeanne McKenney  
Gene & Pat Miesse  
Gretchen Murray  
Charles Neiderhiser\*  
Erik & Helen Nelson  
Jeffrey & Barbara Ost  
Pavone Marketing Group/Varsity  
Branding  
Pennsylvania Horticultural Society  
Piper Sandler  
Rita Precopio  
RLPS Architects  
Thomas Seaman  
Robert & Theresa Sherman  
Hugh & Ann Trumbull  
Nick & Maryland Wanck  
Robert & Katherine Weibel  
H. Drake Williams, Jr.  
Woodrow & Associates

### *Gifts of \$500 - \$999*

Abramson Senior Care  
Ambler Savings Bank  
Anonymous (4)  
Bank of America Matching Gifts  
Jeremy & Beth Brenn  
Communications Services & Support  
Converse Winkler Architecture  
Larry Dessen  
Judith Dittrich  
Kenneth & Joyce Given  
Louis & Margaret Hinman  
Home Helpers

Claudette Kuczanski  
Patricia Modafferi  
Katherine Nilsen  
Paul & Susan Nordeman  
Jeffrey & Dawn Rieder  
Neil & Sue Venart

### *Gifts of \$250 - \$499*

Acme Uniforms  
Anonymous (8)  
Gretchen Aster  
James & Kimberlee Beam  
Blue Bell Hearing Aid Center  
PA State Representative  
Matthew Bradford  
Diane Butt  
Anthony Casinelli  
Michael Doyle  
Virginia Fessler  
Krista Forbes  
Bruce & Connie Fretz  
Gordon Gerber  
Mark & Jane Greenberg  
Susan Harobin  
Paul & Kathy Hellberg  
John Huber  
William Jacobs  
JL Roofing & Siding  
Gail Klein  
Mary Lindner  
Stephen Niechcielski  
Frank & Jean Poehlmann  
Promark Painting  
Roland Swift  
Timoney Knox  
Mark & Kay Waltz  
Ilene Warner-Maron  
West Laurel Hill Funeral Home  
Williamson Electric

### *Gifts under \$250*

David Andrews  
Anonymous (40)  
Maryallis Atkinson  
Lynne Bartholomew  
Barbara Beatrice  
Irene Berardelli  
Estate of Bernice Berger

Laurence Berger  
Ute Bongers  
Theodore Caldwell, Jr.  
Patricia Cavanaugh  
Andrea DeSantis  
Barbara Groshens  
Nancy Huss  
Mildred Jagel\*  
Frank Lamprecht  
Lorraine Lee  
James McCrudden  
Constance Mogavero  
North Pennsmen Barbershop  
Harmony Society  
R.L. Williams Funeral Home  
Lorraine Schoneker  
Robert & Barbara Tibbits  
Fran Tyson  
Catherine Wildt

### *In-Kind Donations*

Jeffrey Carson  
Mary Lindner  
Erik & Helen Nelson  
RLPS Architects

### *Memorial and Tribute Gifts*

**In Memory of Dr. Paul Brucker**  
Joan Brucker

**In Memory of Page Butt**  
Lorraine Lee

**In Memory of Gladys Caldwell**  
Theodore Caldwell, Jr.

**In Memory of Dave Dambly**  
Paul Felton

**In Memory of Anthony DeSantis**  
Andrea DeSantis

**In Memory of Robert Dittrich**  
Judith Dittrich

**In Memory of Albert & Edith Eayre**  
Dean Eayre

**In Memory of Dr. Guy E. Fessler, Jr.**  
Virginia Fessler

**In Memory of Arrow Fickett**  
Martha Fickett

**In Memory of Pat Forbes**  
Anonymous (13)  
James & Antoinette Deever  
Krista Forbes  
Thomas & Cecilia Friend  
Frank Lamprecht  
Hugh & Ann Trumbull

**In Memory of Earl Freed**  
Anonymous  
Maryallis Atkinson  
Lynne Bartholomew  
James & Antoinette Deever  
Paul Felton  
Constance Mogavero

**In Memory of Louise Grablewski**  
Constance Mogavero

**In Memory of Dan Histon**  
Constance Mogavero

**In Memory of Maggie Huber**  
John Huber

**In Memory of Ken Jagel**  
Anonymous (2)  
Lynne Bartholomew  
Thomas & Cecilia Friend  
Heike Kilgore

**In Memory of Roy Jones**  
Anonymous (4)  
Don & Sheila Falcone  
Judy Jones  
Jeffrey & Barbara Ost

**In Memory of Charles Lake**  
James & Antoinette Deever

**In Memory of the Meadowood  
Deceased**  
Stephen Niechcielski

**In Memory of Lida &  
Ed Neiderhiser**  
Anonymous  
Charles Neiderhiser\*

**In Memory of Dorothy  
Oppenlander**  
Sarah Frederick

**In Memory of Carroll "Buck"  
Shelton**  
Anonymous  
James Deysler  
Nancy Huss  
Hugh & Mary Maher

**In Memory of Sylvia Strasburg**  
James & Antoinette Deever

**In Memory of Sandra Williams**  
H. Drake Williams, Jr.

**In Honor of Holly House staff**  
Daniel Bell\*

\*Deceased



# *Leaving a Legacy*

## *Meadowood Legacy Society*

Meadowood truly appreciates our many benefactors who have included a gift for the future of Meadowood. These gifts have impact and meaning for years to come. The Meadowood Legacy Society was established in 2008 to recognize all donors who have contributed to a charitable gift annuity or notified Meadowood of a planned gift or bequest. Donors are honored during an annual luncheon in the fall. Families of deceased donors are encouraged to attend the posthumous recognition of their loved ones.

### *Gifts from Bequests*

John W. Beach - Deceased March 1993  
Mary C. Miller Blood - Deceased October 1998  
Malcolm McFarland - Deceased October 1999  
Edward M. Williams - Deceased May 2000  
Thelma Snyder - Deceased January 2001  
Dorothea Watson - Deceased November 2003  
Eloise E. Kousz - Deceased December, 2005  
Nicholas Nieh - Deceased January 2007  
Flora Katz - Deceased April 2007  
Alice M. Williams - Deceased August 2007  
Virginia Edkins - Deceased October 2007  
Dora Sunderland - Deceased March 2008  
Louisa A. Bennett - Deceased December 2008  
Dorothy Tennant Linton - Deceased June 2009  
William Verna - Deceased May 2010  
Sylvia Shuman - Deceased December 2011  
Frederick Heintz – Deceased March 2018  
Charitable Remainder Trust of Sidnie Harris

### *Charitable Gift Annuities*

Anonymous (2)  
Lawrence Barnickel\*  
Jean Brown  
John Charlton\*  
Paul Chinitz\*  
Verl\* & Margaret\* DeCamp  
James & Antoinette Deever  
Adamadia Deforest\*  
Helen Eddy\*  
Roland Eddy\*  
Elizabeth Frese  
William Jacobs  
Gordon Krecker\*  
Margery McFarland\*  
Mary Pernet\*  
Rita Riccardelli  
Wilma Ries  
Paul Russo\*  
Warren Sellers\*  
Virginia Stone\*  
Robert Strine\*  
Al Thompson\*  
William Toplis\*  
Melanie Trilling  
Robert Glenn\* & Shirley Watson  
Phyllis Wofford\*  
Louie Wright\*  
Maria Yanness\*  
Louise Zuefle\*  
Regina Zuefle\*

\*Deceased



# *Leadership at Meadowood*

## *Meadowood Board of Directors*

Bruce McKenney, Chair  
H. Drake Williams, Jr., Vice Chair  
James Beam, Secretary  
Jeremy Brenn, Treasurer

Philip Albright  
William Black  
Lawrence Dessen  
Eugene Dolloff  
W. Bruce Fretz  
Karen Kelly  
Patricia Modafferi  
Paul Nordeman  
Barbara Ost  
Jeffrey Rieder  
Ilene Warner-Maroon

## *Meadowood Residents Association*

Lorraine Lee, President  
Hugh Trumbull, Vice President  
Sue Venart, Secretary  
Nick Wanck, Treasurer  
Dean Eayre, Assistant Treasurer  
Don Falcone, Corporate Accountant  
Helene Boclair, Past President

### **Council Members:**

John Kratz  
Janet Kovacs  
Sue Lake  
Diane McGovern  
Barbara Nace  
Erik Nelson

## *Strategic Team*

Paul Nordeman, President & CEO  
Marlon Back, Vice President of Facilities Services  
Barbara Beatrice, Vice President of Human Resources & Organization Development  
Elizabeth Cwiklinski, Vice President of Residential Health Services  
Regina Farrell, Vice President of Health Center Operations  
John Kotsatos, Vice President of Marketing  
Christine Pacitti, Senior Director of Dining Service  
Steven Wisniewski, Vice President of Finance/CFO

## *Community Advancement Committee*

Al Gabriele, Chair  
Bruce McKenney, Board Chair  
James Beam, Board Secretary  
Philip Albright  
Joan Bown  
Joan Brucker  
Doris Peck  
Paul Nordeman, President & CEO  
John Kotsatos, Vice President of Marketing  
Jody LaVerdure, Director of Development & Community Relations  
Steven Wisniewski, Vice President of Finance/CFO

## *Acknowledgments*

We gratefully acknowledge (the late) Dave Dambly, Dieter Gohl, and Mark Waltz for their photography and Barbara Beatrice and Joyce Hutton for their editorial counsel.

We apologize if we missed recognition of your gift to Meadowood. Please let us know of this oversight.





## Opening the Grove

In December 2019, Meadowood opened the doors to its first residential living expansion since the West Hill carriage houses in 2003. The Grove is named for the expansive grove of trees on the north side of the Meadowood campus. Designed to offer space and privacy, while fostering a strong sense of community, these unique residences have been described as part house and part apartment – a true blend of the best features of both. The Grove consists of 52 residences, ranging in size from 1,300 to 1,800 square feet. We are excited to welcome new residents, allowing us to serve more seniors and expand our mission to provide the highest quality of life for all who experience the Meadowood community.

