



# Shaping Our Future

## 2022 ANNUAL REPORT



BETH SHOLOM

Excellence in Senior Living

Well-Being - *for Life.*



## A MESSAGE FROM MORRIS "MO" FUNK PRESIDENT AND CEO

In May of 2018, I was astounded to be chosen by our Board of Directors to lead Beth Sholom. The goals that we've met and the enhancements that we've made – both in the quality of care that we provide and the strength of our teams – is proof of our ongoing quest for excellence and our commitment to our mission and core values as an organization.

While the challenges, although somewhat lessened, caused by the COVID-19 pandemic are still here, we continue to overcome a great many challenges, and we've done it by focusing on infection control and vaccination. Our vaccine mandate has proven to be extremely beneficial to the fight.

Although staffing leads the list of challenges facing the Senior Living industry, our team has been truly remarkable. They are taking on more and more each day, continuing to care for our residents with compassion and understanding the difficulties that come with aging.

While we do not have all the answers for what ails us, we certainly can be extremely proud of our many accomplishments this past year.

Thanks to Weinberg Foundation funding, we were able to complete the Gardens Renovation. The updated Gardens is fresh and beautiful and allows us to show up well in the very competitive Richmond marketplace, and we have seen an increase in admissions as a result.

As another component of our commitment to serving the Richmond Jewish community, we have launched Kirva Hospice. Kirva is a Hebrew word meaning "closeness". We believe the name creates a sense of being cared for and accompanied during one's last days. Jointly owned by Beth Sholom and Jewish Family Services (JFS), we have hired our CEO, Jo Anne Seidner, and began accepting patients in February 2023.

The new Beth Sholom website was launched and offers viewers an enhanced image of what Beth Sholom offers. With this new site, we will be able to be more digitally responsive to inquiries and launch an enhanced digital marketing strategy to boost awareness of our services and to drive interest in living at Beth Sholom.

We also added Music Therapy services in our Parkside and Healthcare Memory areas.

We hired our first Christian Chaplain, Ron Stilwell. As a result, we can provide necessary spiritual and cultural needs to our non-Jewish residents. Unfortunately, we are saying goodbye to Randi Nagel as our Jewish Chaplain and we thank her so much for her work as the spiritual leader of Beth Sholom over the last 10 years. We are happy that she will, however, continue her Torah study class which the residents enjoy so much.

### WITH GRATITUDE

I'd like to extend my deepest appreciation and thanks to our residents, families, employees, volunteers and to our Board of Directors, for your dedication and passion for our Mission. Your work is so helpful to me and is a wonderful roadmap for what gets done each day.

I am highly confident we will continue to make progress given the strong commitment of our Board, the Campus Leadership Team and the wonderful support from our residents' family members and the community.

Together, we have survived another tough year, but we are *looking forward to shaping a better tomorrow.*

**MORRIS "MO" FUNK**  
President/CEO



**I'd like to extend my deepest appreciation and thanks to our residents, families, employees, volunteers and to our Board of Directors, for your dedication and passion for our Mission. Your work is so helpful to me and is a wonderful roadmap for what gets done each day.**



## A MESSAGE FROM JANET GALE CHAIRPERSON, BOARD OF DIRECTORS

**T**hrough yet another year full of challenges, we have remained steadfast in our commitment to serve the Richmond community and so continued to move forward as outlined in our strategic plan. We have been extremely fortunate to have an incredible and committed leadership team, with Mo at the helm, and have a dedicated frontline staff who bring our mission to life each and every day. None of this would be possible without the support of our residents, their families, and the greater community. We thank you for the trust you place in us and for the opportunity to provide care for your loved ones.

When we opened in Richmond's Fan District in 1945, becoming the first Jewish home for seniors in the state, we were guided by faith-based values such as kindness, respect, and patience. These fundamental principles are evident each day in how our team members conduct themselves. We are proud of the compassionate nursing care our team provides, and the commitment to excellence that is demonstrated 24 hours a day, seven days a week, all year long. I am awed by our fantastic team and the positive organizational culture they have created and embody on a daily basis.

While much has changed since 1945, those founding principles remain the cornerstone for all that Beth Sholom does. It is our honor to provide a true home for those who choose to live here, and that feeling of honor and commitment shapes our goals for Beth Sholom as we walk into the future. Thank you for your support.

**Janet Gale**  
Chairperson, Board of Directors

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## IMPACT OF THE PANDEMIC

The COVID-19 pandemic changed our world, and nowhere was that felt more acutely than in the senior living industry. While the challenge has lessened, and we continue to see cases, we believe that the overall experience has netted a positive – not a negative. While we mourn the loss of friends and loved ones, we have learned a great deal, and the changes that we’ve implemented will continue to benefit and protect our Beth Shalom family – both residents and staff – for years to come.

To date, we have administered over 673 resident vaccinations and provided vaccinations to an additional 320 staff members and members of the public. We’ve also begun administration of the bi-valent booster, and inoculated over 250 residents and staff. We continue to focus on infection control and vaccination, and continue to ask for mask compliance. We believe that the virus mainly enters our campus through visitors, and encourage mask use to facilitate meaningful personal visitation for our residents.

A simple touch or embrace is not something that can be expressed virtually. We will continue to strive for excellence in our response to COVID-19, and other illnesses that may come, and will emerge triumphant from this challenge.



\*Note: numbers are current as of April, 2023

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To date, we have administered over 673 resident vaccinations and provided vaccinations to an additional 320 staff members and members of the public. We’ve also begun administration of the bi-valent booster, and our most recent clinic inoculated over 250 residents and staff.



## SHAPING OUR FUTURE

When we reflect on our origins as a home for seniors, we cannot help but be amazed at the progress that we've made. Our resident population has grown, we've vastly expanded the level of care that we're able to provide, and our understanding of the needs of the elderly has grown exponentially.

All of our combined experiences have left us poised to become even better as we move forward.

The lingering effects of the COVID-19 pandemic remain with us. While much of the world has attempted a return to normalcy, we serve a highly vulnerable population, and the risk of a transmission of infection returns each time a new resident arrives at Beth Sholom. We're continuing to monitor and combat the effects of the COVID pandemic, and the lessons that we've learned will impact our behaviors and strategies for generations to come. The protocols that we put in place to protect our residents and teams from dangerous infection leaves us better prepared to deal with the next health emergency. These measures will allow us to deliver an enhanced level of care.

Over the past two years, we've been fortunate to receive and utilize two grants from the Department of Homeland Security. These funds have allowed us to enhance the physical security of our facility. Our name – Beth Sholom – means "House of Peace." But that name also creates a certain level of risk. We've all seen reports of a rise in anti-Semitism, and while those of the Jewish faith make up a small percentage of our resident population, being an organization founded on that faith makes us a target to those who wish us ill. While we've added additional cameras and lights, and strengthened our doors and exterior access points, we will continue to search for ways to improve the safety and security provided at Beth Sholom. Working with organizations like Jewish Family Services and other faith-based groups, we will identify the ways



that we can secure our facility 24/7, 365 days per year.

We also continue to develop the tools and resources that allow our residents to experience productive, fulfilling lives. We're adapting fresh programming for our residents that will facilitate visits to our region's best museums and galleries, and whenever possible, bring those enrichments to Beth Sholom for those who are unable to travel. New programs and initiatives will also allow our residents to use their unique and precious life experiences to contribute to our greater community.

We intend to develop strategies and practices to learn about the wants and needs of diverse populations, to educate minority populations about the benefits of senior living options available within the Richmond market, and to help ensure that everyone will be welcome in our communities. A current initiative, "Dreaming Home," is a partnership with some of our peers in the senior living sector. "Dreaming Home" is a Diversity, Equity, and Inclusion (DEI) program that empowers diverse seniors with information about their options based on their values,

social identities, and cultures. This project strives to identify and provide a vision of "home" that becomes a reality to those we serve.

As we've seen the changes in our model since 1945, so do we anticipate changes to our industry moving forward. Kirva Hospice, a new joint venture between Beth Sholom Senior Living and Jewish Family Services envisions a model of senior care that is less based on bricks & mortar facilities and more on care that enhances a senior's ability to live independently. Much like our enrichment programs, we need to seek ways to deliver our mission outside of the walls of Beth Sholom.

We've long known that those in our care require differing levels of support. With the successful renovation of The Gardens, we've shown that we can deliver that support in a wider array of settings. Our suite of services and our legacy moving forward must focus on an improved mission:

Delivering the right service, at the right place, at the right time.

We're excited that you'll be with us as we experience this journey.



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## FUNDRAISING HIGHLIGHTS

**F**undraising around the pandemic has been challenging. The planning, excitement, and then sometimes cancellation of events due to potential outbreaks has been disappointing to say the least. However, we have been able to find creative ways to raise revenue in spite of Covid-19.

In addition to the generosity of the community and our traditional Friends of the Home Campaign, Beth Sholom has had success with some virtual events. Our popular Maj Jongg Madness (in person) tournament transitioned to a Maj Jongg Madness Silent Auction. Participants had the opportunity to bid on a variety of wonderful items like spa treatments, beauty salons, dental and facial cosmetic procedures, club memberships, artwork, jewelry and much more.

We also hosted Swirl, Sip and Support, a virtual wine tasting. This was a fun interactive evening of delicious wine and gourmet pizza. The event was led by Carlos Hubner-Arte, Spanish Wine Importer, and Lance Lemon, owner of RichWine RVA.

Our first in person event was a “friend/fund raising” gathering at Rusty Taco. This was well attended by the community and the Beth Sholom Team. Rusty Taco donated a portion of the proceeds for the evening to Beth Sholom.

The challenges of being a non-profit in the current climate continues. However, we are optimistic that through hard work and creative thinking, we will find more ways to successfully raise funds for Beth Sholom Senior Living.



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**MAH JONGG  
MADNESS**





## THE GARDENS RENOVATION

**W**hen we added The Gardens to our campus in 2000, it was our first assisted living building. Our residents enjoyed the community spaces, amenities, and services provided – all of which created a sense of comfort and home while ensuring safety and the highest level of care.

Thanks to a generous gift from the Weinberg Foundation, we've recently completed a comprehensive refurbishment and renovation of The Gardens. Through collaboration with architectural design firm Perkins Eastman, common spaces were updated with new color schemes, flooring, and lighting. Upgrades were made to furniture, Wi-Fi, and more. We were very pleased with the work of Bowman Construction, who were able to implement this transformation in a restrictive COVID-19 environment, and with minimal disruption to our residents.

Since our Grand Re-Opening on March 23rd, we've welcomed a number of new residents, and The Gardens is now more competitive in the marketplace. We will continue to move forward with our goals for The Gardens and its mission of creating a neighborly community for the seniors of our region.



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 Jim and Gail Plotkin  
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 Harris Raskind  
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 Charles Replane  
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 Mark and Peggy Resnick  
 Sam and Allison Revenson  
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 Stephanie Richardson  
 Regina Richman  
 Anne Richmon  
 Judy Richmon  
 Richmond Jewish Foundation  
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 Susan Roberts  
 Lisa Robertson  
 Beth Rochkind  
 Ken and Katie Roeper  
 Chuck Rogers  
 Rolfe Family Foundation  
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 Murray Rosenberg  
 Irma Rosenbloom  
 Mark and Dena Rosenkrantz  
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 Thomas G. Rosenthal  
 Toby Rosenthal  
 Hilda Rosenzweig  
 Harry Rosmarin  
 Sherri Rosner  
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 Edward Scher  
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 Joyce Scholl  
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 Limor Glazer Schwam  
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 Jay and Lynn Schwartz  
 Jane and Maurice Schwarz  
 Kathryn and W. Harry Schwarzschild Fund  
 John and Gail Schwartz  
 Stephen Schwartz  
 Hyman Schwartzberg  
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 Steven Selinger  
 Edward Senker  
 Michael Senning  
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 William Shaw  
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 Morton Thalhimer III  
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 Foundation  
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Barry Wilson  
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Marian Winer  
Rebecca and David Winston  
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Franklin Wolf and Gini Blostein-Wolf  
Michael Wolf  
Michael and Betty Wolf  
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Heather Zellers

Melissa Zimmel  
Halina Zimm  
Shelley Zimmerman  
Lynn Zinder  
Sonny and Sonia Zinder  
Jeffrey and Terry Zwerdling

### **CORPORATIONS and ORGANIZATIONS**

Acme Paper and Supply Company, Inc.  
Bliley's Funeral Homes  
Christian & Barton, LLP  
Community Foundation  
Congregation Or Ami  
Dominion Voice and Data  
Health Care Services  
HPSI Purchasing  
Infotel Systems, Inc.  
Johnson Controls Fire Protection LP  
Mckesson  
Medline  
Old Dominion Mechanical  
SageAge  
Sands Anderson PC  
Scott Insurance  
Senior Guide  
Seniors Housing Guide of Richmond  
Simplicity VoIP  
Small Miracles Promotional Products  
TCMS  
ThyssenKrupp  
Towne Bank/BS  
Unidine Corporation  
Walker-Phillips Healthcare Consulting

### **WE WOULD LIKE TO THANK AND RECOGNIZE THE FOLLOWING ORGANIZATIONS FOR THEIR CONTINUED SUPPORT**

Congregation Beth Ahabah-Hebrew Fund  
Jewish Community Federation of Richmond  
Richmond Jewish Foundation

*We have made every effort to ensure that all donors are included. If we have left you out, please let us know.*



# STATEMENT OF OPERATIONS 2022

FISCAL YEAR ENDING SEPTEMBER 30, 2022

Skilled Nursing .....	\$11,348,358
Assisted Living .....	\$6,142,759
Outpatient Rehabilitation .....	\$189,152
Other .....	\$221,741
Net Assets Released from Restrictions .....	\$40,616
<b>Total Operating Revenue.....</b>	<b>\$17,942,626</b>

Salaries & Wages .....	\$3,699,914
Agency Nursing .....	\$4,088,769
Employee Benefits & Taxes .....	\$1,310,598
Contract Services .....	\$8,701,507
Other .....	\$3,200,725
Depreciation .....	\$1,446,092
Interest .....	\$895,041
<b>Total Operating Expenses.....</b>	<b>\$23,342,646</b>

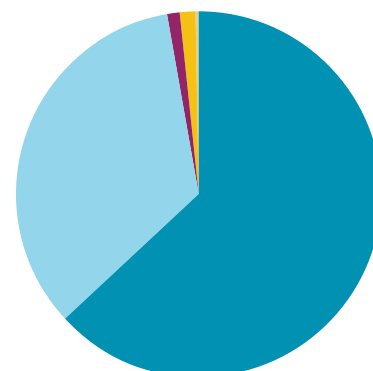
Loss from Operations .....	(\$5,400,020)
Non-Operating Income .....	\$738,582
Contributions & Grants .....	\$351,497
Deficiency of Revenues over Expenses .....	(\$4,309,941)

## Medicaid Charity Care

Cost Per Patient Day .....	\$336
Average Medicaid Payment Rate (per VHI filing) .....	\$245
Estimated ppd gain/(loss) per day .....	(\$91)
Medicaid days .....	\$11,856
Estimated annual gain/(loss) .....	<b>(\$1,078,896)</b>

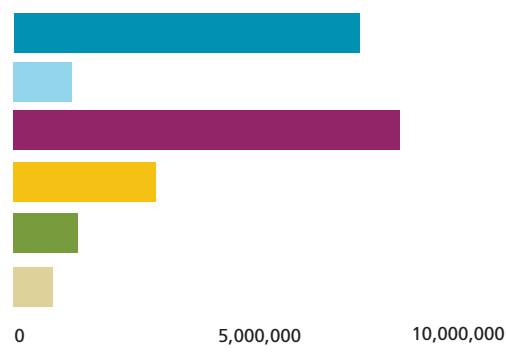


## SOURCES OF REVENUE



- Skilled Nursing
- Assisted Living
- Outpatient Rehabilitation
- Other
- Net Assets

## OPERATING EXPENSES



- Salaries & Wages
- Employee Benefits & Taxes
- Contract Services
- Other
- Depreciation
- Interest

## COMMUNITY SERVICES

Resident Care Scholarships .....	\$6,000
Bad Debt .....	\$28,558
Community Health Education .....	\$3,500
<b>Community Benefit Total.....</b>	<b>\$38,058</b>





#### OUR COMMUNITIES:

**The Gardens** Assisted Living

**Parkside** Assisted Living & Memory Care

**The Healthcare Center** Nursing & Skilled Care

#### HOME & COMMUNITY BASED SERVICES:

**Outpatient Clinic** Rehabilitation Services

**Kirva** Hospice

1600 JOHN ROLFE PARKWAY | RICHMOND, VA 23238 | (804) 750-2183 | [WWW.BETHSHOLOMLIVING.ORG](http://WWW.BETHSHOLOMLIVING.ORG)



#### OUR MISSION

TO PROVIDE QUALITY AND COMPREHENSIVE RESIDENTIAL, HEALTHCARE AND COMMUNITY-BASED SERVICES TO INDIVIDUALS OF ALL FAITHS, IN A MANNER THAT REFLECTS OUR JEWISH TRADITIONS AND VALUES.

#### OUR VISION

TO BECOME A CENTER OF EXCELLENCE, COMMITTED TO ENHANCING THE LIVES OF THOSE IN OUR COMMUNITY AND OUR STAFF, SERVING ALL IN A MANNER THAT REFLECTS OUR SOCIAL, CULTURAL AND SPIRITUAL VALUES.

#### CORE VALUES

WE VALUE EXCELLENCE IN ALL WE DO

WE VALUE OUR EMPLOYEES AS OUR GREATEST ASSET

WE VALUE RESPECT FOR ONE ANOTHER

WE VALUE ACCOUNTABILITY AND INTEGRITY

WE VALUE OUR DIVERSITY AND OUR TEAMWORK

WE VALUE OUR TRADITION AND THE COMMANDMENT TO 'HONOR THY FATHER AND MOTHER'

