



Lutheran Homes
of South Carolina
promoting the well-being of older adults



2022

ANNUAL REPORT

A YEAR OF
RECOVERY

A Year of Recovery

Frank Shepke, President and CEO



I want to thank you for taking the time to review our annual report with the results of our last year of operations here at Lutheran Homes of South Carolina. It was a year of recovery and some return to normalcy although many of the effects of the COVID pandemic continue to impact our Christian ministry of care to seniors.

We are indeed blessed to have a dedicated, hardworking team who understand that our mission is delivering the highest quality of care with a servant's heart in all that we do.

This past year, we began seeing a slow but steady improvement in our census across all of our services yet we still have a way to go to reach our pre-pandemic levels. We also saw a very dramatic rise in inflation and the cost of goods, services,

and wages that continued to impact operations.

In spite of all these headwinds, we prevailed and the arrow is definitely starting to point up as we move into the future with the awesome leaders and TeamMates that are at the heart of our ministry. We also laid plans for the days ahead with new expansions at two of our campuses that will build upon the success of our award winning "Courtyards" Senior Living concept.

In closing, I want to thank our Board of Directors, the generous donors to our Foundation, our fantastic team and all those who placed their trust in our care over the last year. We've tried to do our very best every day to honor our commitments and never let you down. It's our mission, our life's work and most importantly, you are the reason we exist. Thank you again and may our good Lord bless and keep you!

From the Board of Directors

Jack Balling, Chair, Board of Directors



On behalf of the LHSC Board, I would like to commend our staff (TeamMates) and residents (Priorities) for navigating another difficult year in these unprecedented times. Despite continuing to deal with the effect of COVID, Lutheran Homes continues to move forward towards its goal of providing the highest quality healthcare and residential accommodations and services to those who are in our care.

Our leadership team continues to plan for the future of

supportive senior health care, services and programs in South Carolina and has the full commitment of our entire Board of Directors.

As we begin a new year, ground has been broken for additional award-winning "pocket apartments" at the Heritage at Lowman and plans are moving forward to build the same concept at Rosecrest in Inman, SC. Renovations at all our facilities continue to move forward as well.

We look forward to the continued progress for which Lutheran Homes is known.

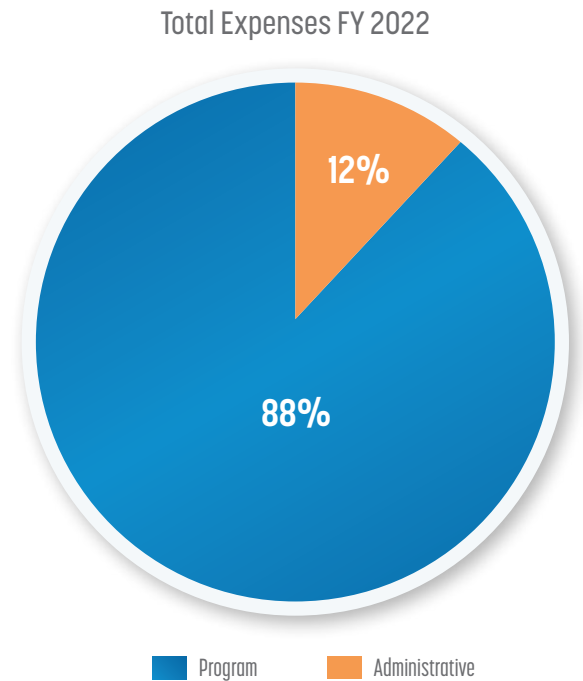
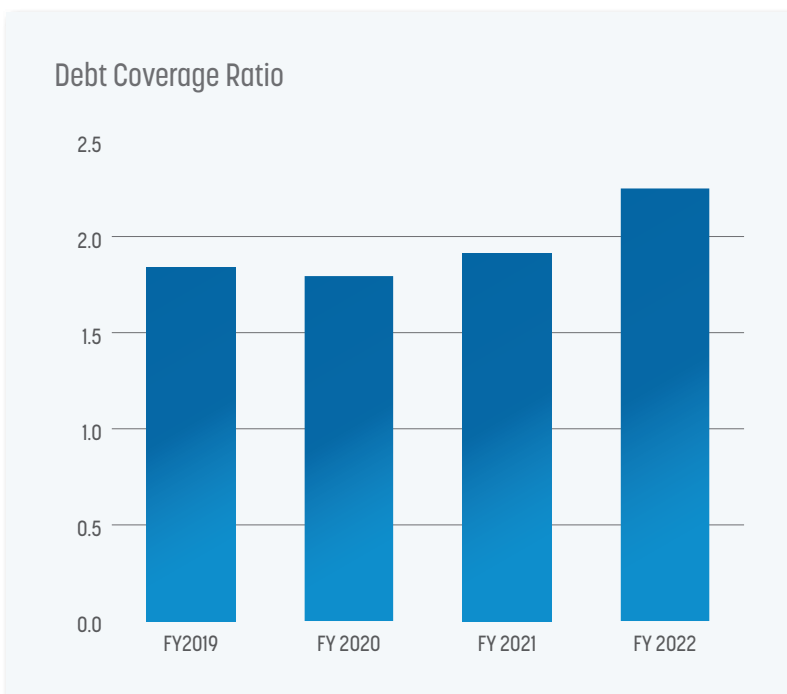
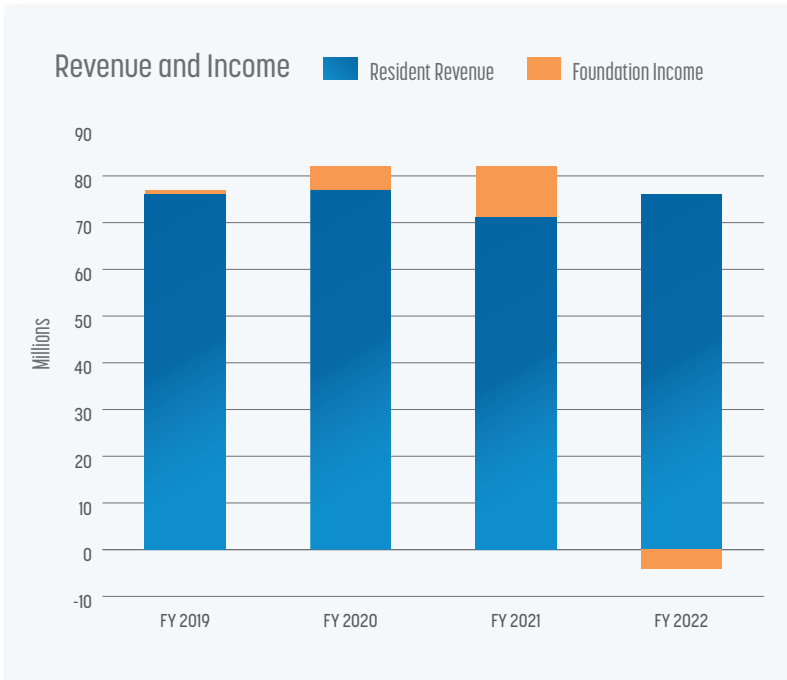
Award Winning
Courtyard Pocket Apartments



Financial Overview

Lutheran Homes of South Carolina and Affiliates (LHSC) is proud to report favorable consolidated financial results for the fiscal year ending September 30, 2022. The challenges of COVID continued to impact occupancy and workforce. Added to these hurdles were the impacts of high inflation and a significant downturn in the Foundation investments from a poor economy. While the combined operating performance was less than budget, there was improvement over the prior year, which is encouraging. Completing the financing and beginning construction of two Courtyard apartment buildings each at Rosecrest and the Heritage at Lowman in June was an important step to future financial improvement.

Looking ahead, we will continue to manage these difficult circumstances and reinvest in facilities to remain competitive.



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.

Operations

LHSC operated five Continuing Care Communities (CCRC), both a multi-county hospice program and a non-medical home services (NMHS) program and a Continuing Care at Home (CCAH) program. Our programs and campuses are as follows:

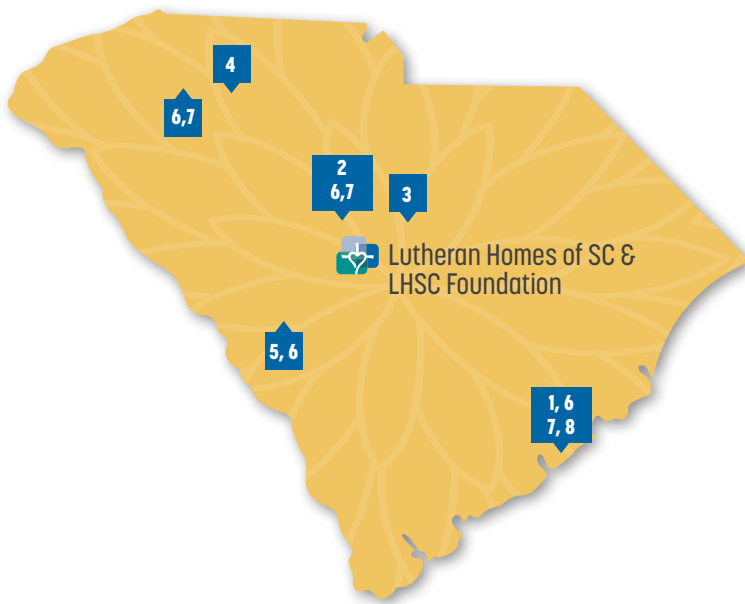
Total Priorities Served in FY 2022: 3,051

Continuing Care Retirement Communities (CCRCs)

- the Heritage at Lowman: 609 Priorities
- Franke at Seaside: 525 Priorities
- Rice Estate: 568 Priorities
- RoseCrest: 471 Priorities
- Trinity on Laurens: 95 Priorities

Home and Community-based Services

- Lutheran Hospice: 559 Priorities and 1,667 Families
- BeWell Home Services: 151 Priorities
- BeWell@Home: 112 Priorities



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

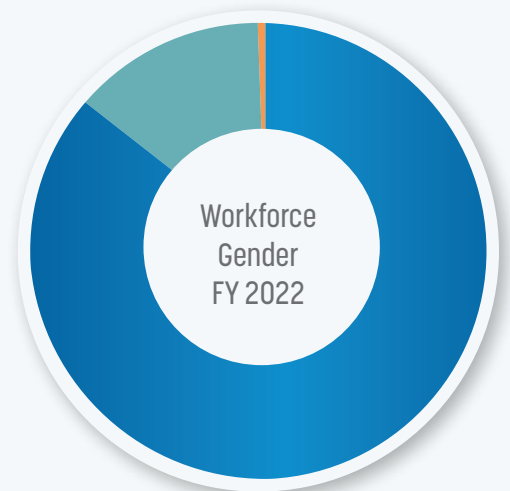
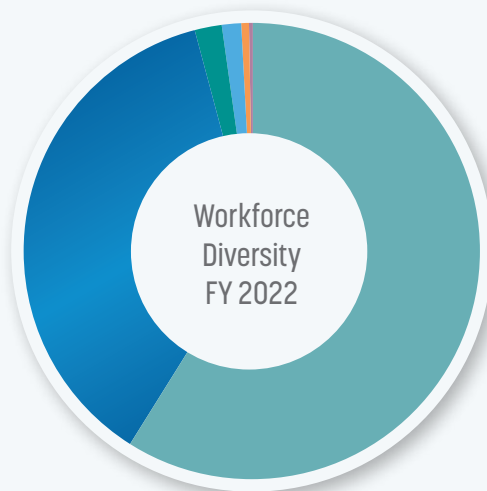
- Upstate, Midlands, Lowcountry
- 6 BeWell Home Services
 - 7 Lutheran Hospice
 - 8 BeWell@Home - Statewide

Human Resources

By the Numbers

In FY 2022, the following is a breakout of our team:

- 848 hourly TeamMates including PRN status
- 152 exempt level or management leaders



59% African American 37% Caucasian 2.3% Hispanic
1.5% 2 or More Races .4% Asian .1% Unknown

856 Female 140 Male 4 Non-binary

How Are We Doing?

Each year LHSC surveys residential and healthcare Priorities and family members about their perception of their community's staff, life enrichment activities, grounds, buildings, meals, direct care and services, and other factors that affect life at their residence. The surveys help us focus on areas to improve and celebrate our successes. Altogether our communities' two most valued questions received very high marks:



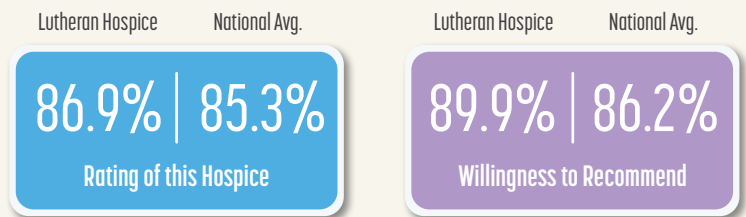
1. Would you recommend Lutheran Homes of SC to others?
2. What is your overall satisfaction with Lutheran Homes?

LHSC Priorities and families share their positive feedback:

- We love being a part of [the Heritage at Lowman](#) community! Both staff and residents feel like family.
- I give this place a big 100%. They work miracles. [RoseCrest](#)
- [Trinity](#) has been a blessing in SO many ways to our family.
- Staff are very friendly and caring attitude—RN's CNA's, housekeeping. Everyone is so nice! [Rice Estate](#)
- I have lived at Franke since 2015, and have been very happy to call it home. I intend to remain here for life. [Franke at Seaside](#)

Lutheran Hospice families share their positive feedback:

Throughout FY 2022, Lutheran Hospice remained a dependable hospice provider. Quality measures and family surveys show that Lutheran Hospice outperforms the national average in all CMS measured criteria.



Programs and Services

BeWell@Home | Being Jean's "Someone"

BeWell@Home Wellness Coordinators know how to advocate to doctors, nurses, therapists, insurance companies...you name it. They know how to understand members' medical issues, file insurance claims, facilitate transitions back home with care givers, etc.

The trickiest part of their job is finding where they fit in the picture? Does this member have family? Close friends? If so, how involved do they want to be? Are they stepping on toes by doing what they do best? For some members, they are a resource to answer families' questions. They stand by families to call to avoid "too many cooks in the kitchen." In these situations they try support members by stopping by for short visits and check in with family periodically to see how things are going and offer help. For some members, it's only the Wellness Coordinators to help steer the ship.

Jean Lucas wanted to do everything she could for her uncle. After his fall that required hospitalization and rehab, Jean found herself overwhelmed with finances, insurance, doctors' appointments, caregivers, and most importantly—the many decisions that rested with her as her uncle's Power of Attorney.

Jean turned to Katharine Hassell, his Wellness Coordinator and they established that Katharine would guide and support and be more involved if it ever was "too much." Jean needed to talk through the many care decisions with someone. Someone to tell her it was okay to be unsure and to sleep on the options overnight. Someone to handle the long

term care insurance claim. Someone to set up his home for post-hospital recovery and 24/7 care. Someone to send links for care items to order online.

Someone to help her navigate challenging family dynamics. Someone to eventually facilitate her uncle's transfer to Franke at Seaside. Someone to explain every caregiving step.



Katharine feels lucky to be Jean's "someone." "To witness

Jean's love, care, and devotion to her uncle was a beautiful reminder of why I do what I do. BeWell@Home is a source of support for the 'Jeans' of the world and our members. When members don't have a Jean, they have BeWell@Home. They have me."

Lutheran Hospice | Gameplan

What's the gameplan? This phrase focuses team players, students, and even congregations to look at what is happening in the moment, and what needs to happen in the future. Hospice caregivers often act as coaches and provide patients and families with a playbook for their end-of-life care.



Sheila Miller, RN, had the privilege of being at the bedside for our 97-year-old patient diagnosed with pancreatic cancer. He had lived a fiercely independent life helping "taking care of the elderly" (as he called it) and

doing yard work for neighbors who were 20-years younger than him. He had raised a family, retired from Clinton Mills, served in the US Navy in WWII, attended Clemson University, graduated from Presbyterian College, and remained a season ticket holder for any sporting event possible from 1948 until 2023. He attended every football, basketball, and baseball game possible to support

his Presbyterian Blue Hose teams.

When Presbyterian College Woman's Basketball Team learned he had attended his last game, every player came

to cheer for him. They stood around his bed and thanked him for standing by them all these years. They signed a shirt for him and hung it beside his bed to remind him of their gratitude. When our nurse visited him the next morning, the first thing he said was, "Do you see my shirt, they all came and they were so TALL!" He was prouder than ever of his team!

Sheila notes, "I'm grateful to be part of the Lutheran Hospice team that gave me the opportunity to offer him comfort, peace and hold his hand as his time ran out. Being able to give excellent end-of-life care is a win every time!"

BeWell Home Services | Match Makers



BeWell Home Services (BWHS) celebrated 15 years of providing non-medical home care across the state in October of 2022.

Tressy Davenport, BWHS - Midlands program director takes great pride in making the best caregiver and client Priority match. When families look for non-medical home care services they may need of help with personal care, medication reminders, meal prep, or transportation. Tressy believes that caregiving is about more than performing a list of tasks; "It's about the human relationships that foster a bond of trust. Whether someone receives care a few hours a week or 24/7, how they connect with their caregiver matters and the right caregiver/client match can make a world of difference to the whole family."

Dorothy Hart, pictured, was the first BWHS caregiver hired and in her tenure she has cared for over 125 BWHS Priorities. Dorothy brings a wealth of

30 years of experience as a certified nursing assistant and a genuine ability to connect with clients and families. Dorothy feels that her best outcome is when the client is "born again," with a renewed desire to live, go places, and do things that they may have stopped doing. She tries to encourage her client Priorities to do as much for themselves as possible. Aging can be a mental strain as well a physical strain and Dorothy does a good job motivating her care recipients to live the best possible life at every stage. She is happy to see them regain independence when they can do so. Dorothy knows when her match is a success noting that "I am able to be a support to the family as well as the care recipient. I also strive to leave them in a better position than I found them."

Continuing Care Retirement Communities

Rice Estate | Recognition and Renovations

Rice Estate resumed hoisting their annual First Responders Breakfast to recognize and thank them for their service and sacrifice to our community, and especially for the extra demands placed on them during the pandemic. TeamMates and Priorities expressed how exciting it was to see all the first responder vehicles as they arrived on campus.

It was an honor to have representation from the Richland County's Sheriff Department, Emergency Medical Services, Fire Marshalls and Fire Departments in attendance. TeamMates and Priorities offered words of appreciation and enjoyed the conversations with stories shared and safety advice from the first responders. A highlight was an opportunity for a photo with Sheriff

Leon Lott and officers from the 'On Patrol Live' television show. Visits with the four-legged responders brought many smiles.

After many months of planning, building and designing, Rice Estate renovated the main dining room to create two distinct dining spaces for both Independent Living and Assisted Living Priorities. The design of each dining room adds a more contemporary touch



with the new overall layouts, furniture, lighting, art and amenities while maintaining the warm and inviting atmospheres Rice Priorities enjoy. The independent living private dining room has a modern sliding barn-style door for added privacy.

While dining in alternate locations, and upon their return to the new space, Priorities remarked that "It feels so special to eat in such a lovely place, with such delicious food too." And "The art just makes me feel so happy to come here."

RoseCrest | Staying Alert and Taking Action

In September, RoseCrest hosted its annual collaborative with Spartanburg County Emergency Management to hold a full-scale fire disaster drill coinciding with Emergency Preparedness Month. This joint effort included S.C. Department of Health and Environmental Control (DHEC) Fire & Life Safety, North Spartanburg Fire Department and Spartanburg County Emergency Management.

The purpose of this training is to ensure that all TeamMates and local agencies are fully prepared to protect our Priorities and TeamMates, while keeping them safe in the event of a real disaster situation. Derrick Jones of SC DHEC Fire & Life Safety stated, "We all have the same mindset saving lives and property conservation."

This real time training involved a simulated start-to-finish fire emergency. The scenario started by RoseCrest staff notifying 911, fire personnel dispatching, monitoring agencies' response time, and evacuating RoseCrest Priorities and TeamMates, all while fire fighters suppressing the fire. The fire department climbed a ladder truck and simulated an evacuation removal through an opening in the roof and window. Triage tents were set up to manage real life emergency medical circumstances.

RoseCrest and agency leaders reviewed the full campus layout, observing building layout and roof access for evacuation plans for first responders,



and discussed future building expansion plans. Melissa Yetter, RoseCrest Executive Director, takes emergency preparedness very seriously noting that "This annual cooperative effort from all parties is an ideal way to bring together the local community resources to support the safety of all that live and work within the RoseCrest campus."

Franke at Seaside | A New US Citizen!

Tamara Smalls, Burgess Center Dining Room Coordinator celebrated a monumental achievement—becoming a United States citizen!

Born in Jamaica, 'T', as she is affectionately known, always wanted to move to the United States. In 2006 she joined her father in Virginia and received her Green Card, finished her schooling and worked in the hospitality resort industry. Upon moving to Charleston in 2008, she joined Franke at Seaside.

Achieving US Citizenship is not a casual undertaking. The 20-page N400 Application for Naturalization form is, itself, formidable. After submitting her application, Tamara waited sixteen months before her Homeland Security interview. As part of the process, she was required to demonstrate her ability to read and write English and to share her tax returns.

The most nerve-wracking part of the interview was to correctly answer 6 out of 10 questions, chosen from a list of 100 questions about American history, government structure and our Constitution.

While working at Franke, she also diligently studied the Bill of Rights, the other Constitutional Amendments, the primary government branch functions, and the names of prominent federal government members, including her Senators and Representatives. Tamara answered each of the first six questions correctly!



Franke Priorities and TeamMates are very proud of Tamara and feel blessed to know her. One resident shared, "Tamara always goes the extra mile to help us and do her job. She delivers meals to the residents efficiently and is in constant motion around the kitchen doing so with a smile and a

greeting. Nothing gets past her. Any need of a resident is immediately seen and addressed." Another resident wrote that "Tamara constantly strives to delight residents in their dining experience. Always a smile, always hardworking, always effective. A leader!"

Trinity on Laurens | Easy Riders

"It's as easy as riding a bike," the popular saying goes. The common expression is used to refer to a skill that you can always remember, but we wonder if riding a bike is a skill that we never forget? Relearning a skill is not the same as forgetting how to do something, it just may not be done in the same way. Riding a bike is a procedural memory, which is learning something easy for the brain to retain and that is stored in our long term memory.

The generous donors of the Lutheran Homes of South Carolina Foundation gifted Trinity on Laurens a side-by-side dual tricycle. The hope was that Trinity's life enrichment department and rehabilitation services could bring

TeamMates and Priorities together for a fun activity that offered both physical and social stimulation.

Trinity's Brian Adkison, maintenance supervisor and pastor, and Priority, Mrs. Jean Havner, enjoyed a ride around the block with lots of great conversation and many laughs. Brian reflects that "This spur of the moment spin on a bike, made me feel young again and I hope it was the same for Mrs. Havner."

Who wouldn't want to experience fresh air and sunshine while being escorted by tricycle in beautiful, downtown Aiken? The Trinity Priority's and Team-Mate's smiles show it all!



the Heritage at Lowman | Lakeside Transformation

The Heritage at Lowman's Bethany building for assisted living memory care was built in the late 1990s featuring 24 units in each of two distinct neighborhoods



with mostly semi-private rooms with shared baths. Since then, the building underwent various minor updates focusing on furniture replacement and changing paint colors to go with the times. Fast forward to late 2021 and into spring 2022 with the Heritage redevelopment team initiating plans to update campus assisted living options to best meet community needs.

The Woodside wing remains dedicated to memory care and Lakeside underwent transformation to become a

more traditional assisted living program. The original 24 units were converted to eight two-room suites and eight studio apartments with basic kitchen appliances and in-room showers. A neutral color

palette provides a fresh canvas for residents to personalize with their own décor. Renovations include new luxury vinyl plank flooring, bright, energy-efficient lighting, and updated paint, artwork, and furniture in common living and dining areas. The open concept common areas offer welcoming space for residents, families, and visitors to enjoy fellowship and activities.

An updated outdoor corner patio overlooks the stocked pond giving it a serene setting where residents visit

with families and each other, enjoy chair exercise classes, watching birds and people strolling by as the weather permits. A sail cloth shade cover helps to mitigate the heat for added seasonal comfort. It's now treated like an outdoor room with tables, chairs and container plantings that encourage Priorities to enjoy time outside. In addition to group classes, a fitness highlight is a dedicated exercise area where residents have ongoing access to an array of equipment to benefit older adults using it independently or during scheduled physical therapy sessions.

Residents and families are thrilled with the results with a campus resident noting "I may just have to move in too. The whole place is just inviting, it's so modern, light and bright." The Heritage's purposeful planning will help to ensure that Lakeside's refreshed look will remain appealing for residents to live comfortably for years to come.

High Five Club

TeamMates of the Quarter and TeamMate of the Year



Every month at each community and program, Priorities, family members, TeamMates and other individuals from places we serve nominate exceptional TeamMates

to be recognized as the monthly Five to Thrive (5TT) High Five Club monthly champion for going 'above and beyond.' These monthly community and program winners are then eligible for consideration for the LHSC TeamMate of the Quarter. At the year's end, each quarterly winner is enrolled to be selected as LHSC's High Five Club Teammate of the Year.

All winners are announced at a special 5TT High Five celebration at their workplace and receive Points of Praise also known as POP Points which are to be exchanged for a gift of their choice from Amazon. The annual winner is also a special guest to meet with the LHSC Board of Directors.

2022 LHSC TeamMates of the Quarter - \$500 POP Points



1st Quarter: Loretta Hampton, Lutheran Hospice – Midlands Certified Nursing Assistant

2nd Quarter: Tammy Hampton, Rice Estate Supply Clerk

3rd Quarter: Sherry Gibbs, RoseCrest Community Outreach Director

4th Quarter: Yvonne Campbell, Franke at Seaside Laundry Team Leader

2022 LHSC TeamMate of the Year | \$2500 POP Points

Sherry Gibbs, RoseCrest Community Outreach Director



Sherry Gibbs sets the bar high for excellence by demonstrating teamwork with her peers, and always making herself readily available to accommodate the needs of Priorities. She is knowledgeable about her job duties and utilizes her skills to educate others to get a better understanding of what it takes to keep RoseCrest running successfully.

Sherry exemplifies loyalty to Lutheran Homes, great leadership skills, and teamwork. A pleasure to work with, it is evident through her work that she thrives to maintain RoseCrest at a 5-star, and provide the excellent standards the team has achieved.

Sherry is a resource to others whether it is a billing question in regards to insurance, a family question, when nurses need additional information for patient care, or when it comes to the DHEC surveys. TeamMates note

that she changes from her high heels to her Nike prestos and jogger and is always willing to lend a hand.

Sherry was scheduled for vacation and RoseCrest had a Covid positive patient which required a special unit and testing to be set up. She could have left to start her vacation, but she put the needs of the residents above self. Sherry not only helped test every skilled resident, she stayed to ensure everyone moved into a room. While on vacation, she worked remotely to ensure admits still occurred and made herself available to her TeamMates.

Most departments have a team, with the exception of a small few. Sherry is that one woman army. We honor Sherry for her dedication and commitment to our Priorities and TeamMates and exemplifying the 5 to THRIVE principles through her work and actions.



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