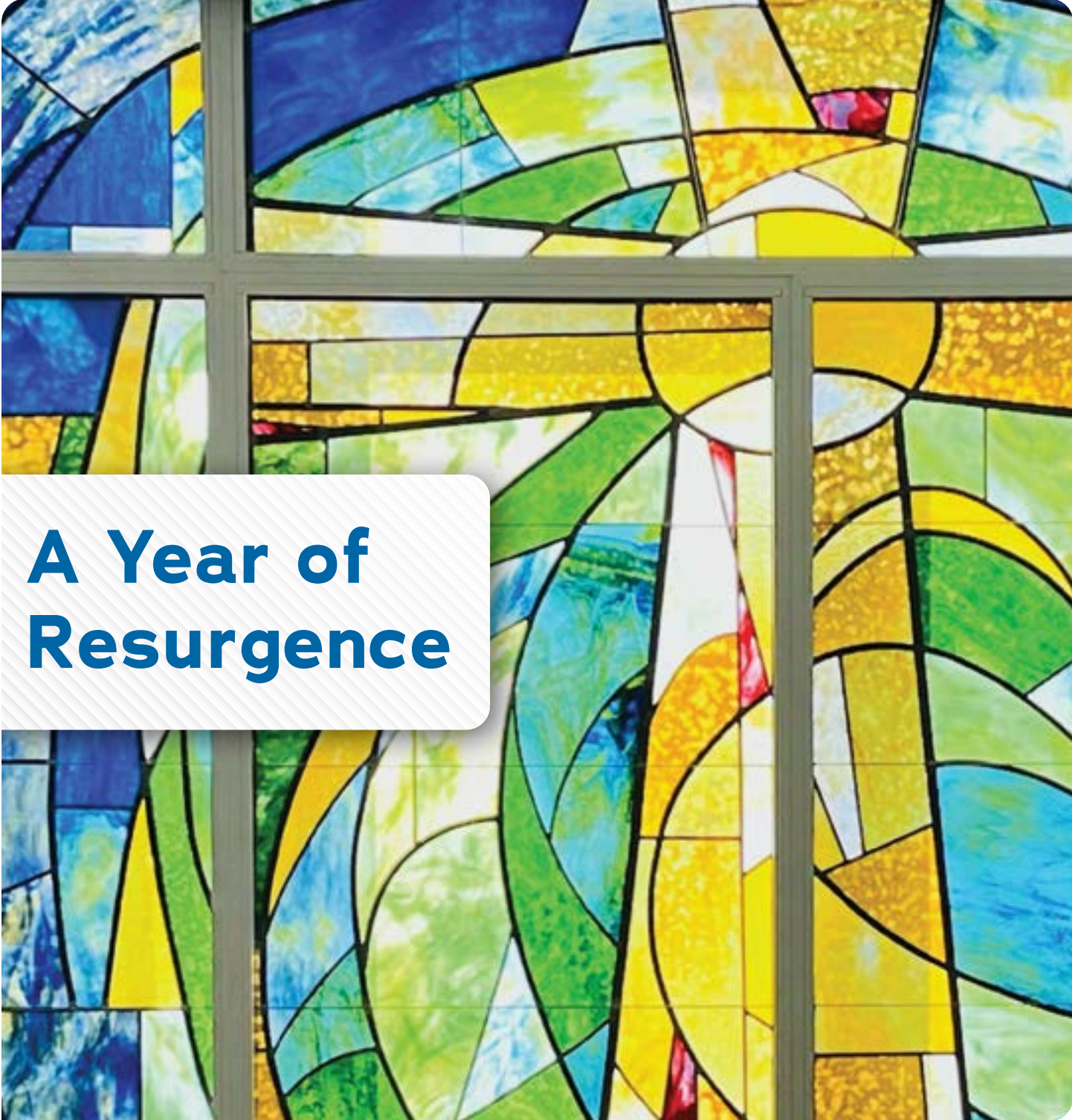




**Lutheran Homes**  
of South Carolina  
*promoting the well-being of older adults*



# A Year of Resurgence

**2024 Annual Report**

# A Year of Resurgence

Frank Shepke, President and CEO



Thank you for taking the time to read our FY24 Annual Report, highlighting the many milestones and achievements at Lutheran Homes of South Carolina over the past year. It has been a year of resurgence, growth, and continued progress following the challenging years of the COVID Pandemic.

One of our greatest achievements was finalizing our expansion project at our RoseCrest campus adding 18 of our award-winning Courtyard model apartments. We also expanded the main building to enhance dining, and the crowning jewel was our beautiful new chapel, providing a proper place of worship for our beloved residents.

We also had extensive renovations at our Rice Estate campus with our assisted living apartments. The work done was spectacular and they are certainly first class offering a beautiful and elegant living experience.

Down by the sea at our Franke at Seaside campus, our teams completed renovations and upgrades to our Oakside apartments. The results hit the mark and our folks moving in have been so happy with the quality and environment. Additional improvements continued across major apartment buildings, ensuring our coastal campus remains a top choice.

The theme of resurgence didn't stop there, as upgrades to units at our Trinity on Laurens and Heritage at Lowman campuses were undertaken to keep our offerings fresh and competitive in our markets.

Our Lutheran Hospice program had an exceptional year, providing compassionate end-of-life care at all locations across the state. The heartfelt gratitude from the families we served stands as a testament to the compassion, professionalism, and caring hearts of our TeamMates who deliver this important service.

For those needing care at home or planning for future needs, our BeWell Home Services and BeWell@Home programs served hundreds of families across the state, delivering exceptional, timely, and compassionate care and guidance.

Lastly, I want to express my deepest gratitude to our visionary Board of Directors, dedicated managers, and TeamMates, all those we serve, and, most importantly, to our Lord for the support, hard work, and grace that allow us to fulfill our mission. Serving our seniors is a blessing, and we remain committed to doing so with a servant's heart because at Lutheran Homes of South Carolina, Job #1 will always be caring for those we serve.

God bless, and thank you again!

## From the Board of Directors

Jack Balling, Chair, Board of Directors



On behalf of the Board of Directors, I extend gratitude to our management and staff for their dedication throughout the past year. Their unwavering commitment ensured that Lutheran Homes of South Carolina continued to provide award-winning care—whether on one of our five campuses or through our hospice and non-medical home care programs.

Rebounding from the challenges of the pandemic, we completed key renovations across our communities to enhance quality of life for our residents. We also celebrated the addition of new courtyard

apartments at the Heritage at Lowman and RoseCrest, keeping up with current senior living trends.

As we continue to plan for the future of senior health care across South Carolina, the management team has our full support. Whether you're looking for a welcoming senior living community or assistance at home, Lutheran Homes of South Carolina is here to support you. We encourage you to connect with us—visit a campus, explore our home-based programs, or reach out to learn how we can serve you and your family.

# Operations

Lutheran Homes of South Carolina (LHSC) provides exceptional senior living and care through five licensed Continuing Care Retirement Communities (CCRCs), also known as Life Plan Communities. In FY24, LHSC served 4,027 residents and patients across independent living, assisted living,

memory support, skilled nursing, and short-term in and outpatient rehab. Beyond campuses, LHSC extends its mission statewide through Home and Community-based Services, including hospice care, BeWell Home Services for non-medical in-home support, and BeWell at Home, a Continuing Care

at Home (CCAH) program that helps seniors age in place.

Whether in one of our thriving communities or receiving care at home, we are dedicated to enhancing the lives of those we serve—one person, one family at a time.

## Continuing Care Retirement Communities 4,027 Priorities

### Home and Community-based Services

Lutheran Hospice: 590 patients and 1,770 families

BeWell Home Services: 86,573 hours of support services for 135 Priorities

BeWell@Home: 131 Priorities

### Age

- Average age: 84 years
- Youngest resident served: 39 years
- Eldest resident served: 113 years

### Gender

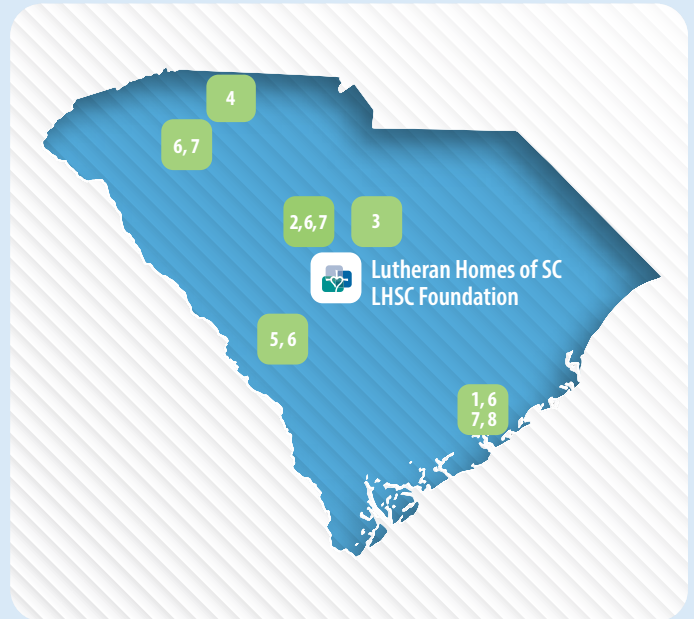
- Female: 62%
- Male: 38%

### Ethnicity

- American Indian, Alaska Native, Asian, Hispanic or Latino, Native Hawaiian, Other, Pacific Islander, Unknown: 13%
- White: 74%
- Black or African American: 13%

### Religion

- Christian 18%
- Baptist 17%
- Catholic 5%
- Presbyterian 4%
- Lutheran 3%
- Other/Unknown 53%
- Buddhist, Episcopal, Greek Orthodox, Jehovah's Witness, Jewish, Methodist, Mormon, Pentecostal, Seventh Day Adventist



### 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

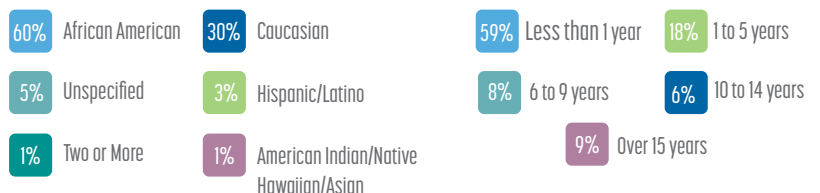
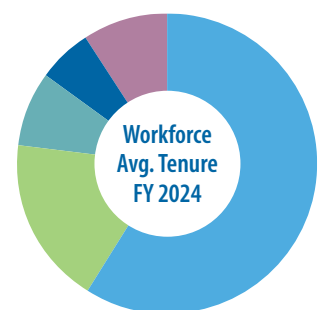
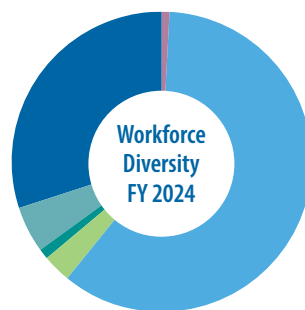
### Programs & Services

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

# Human Resources

Our dedicated TeamMates are the heart of our mission. With 1,726 employees across our communities, 41% have served for five or more years, reflecting strong retention and engagement.

To address industry-wide workforce challenges, we've expanded hiring initiatives, strengthened school partnerships, and enhanced referral incentives. Competitive benefits and career growth opportunities make Lutheran Homes a top choice for those called to serve in senior care.



# 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

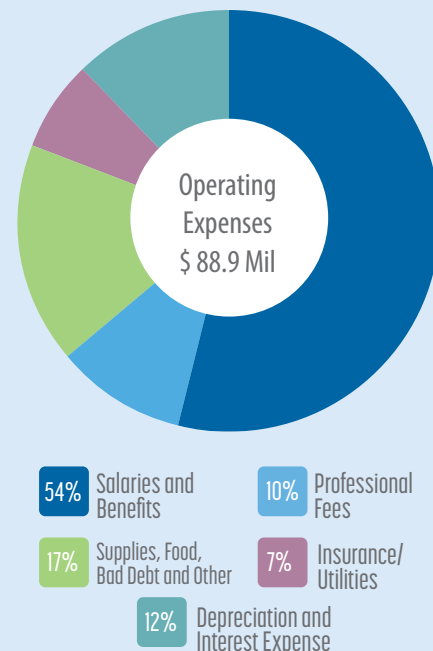
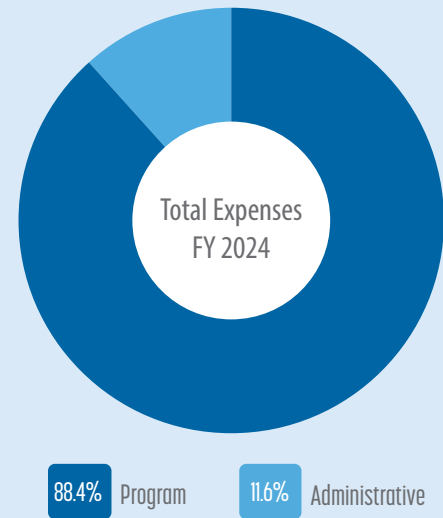
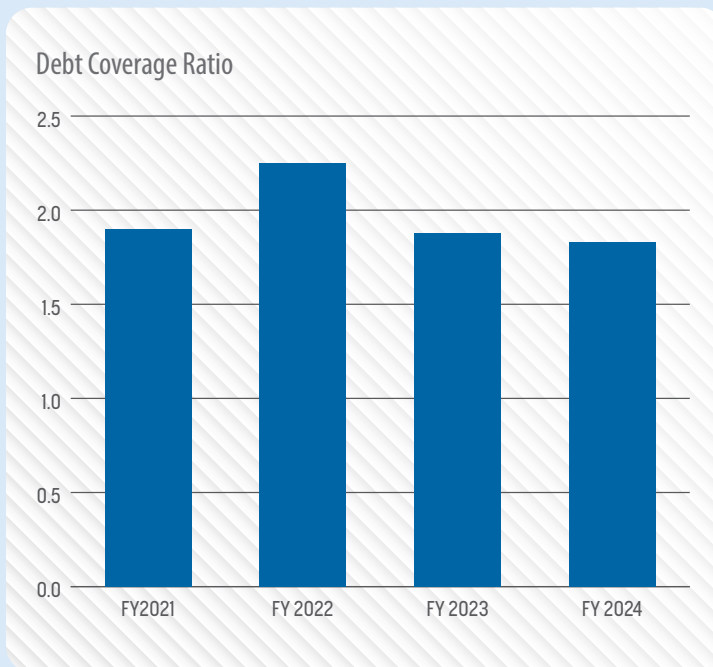
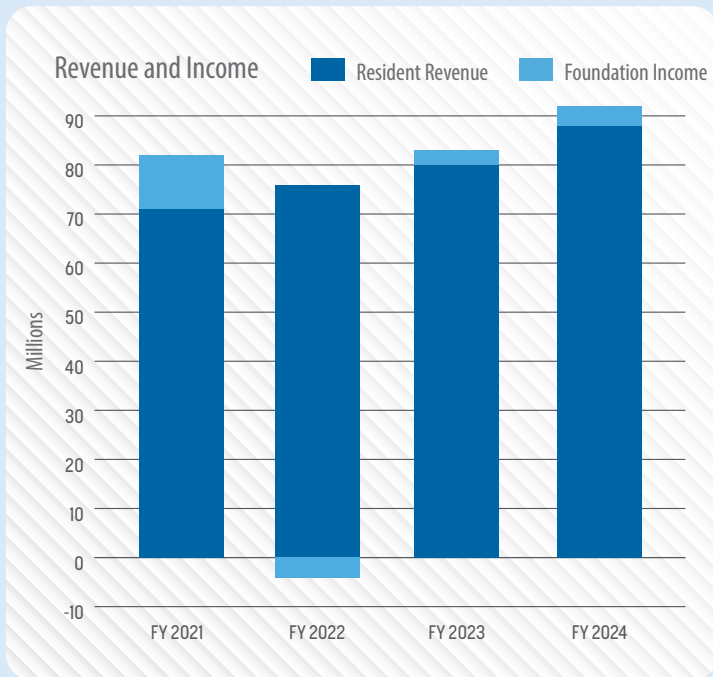
We are pleased to report that our organization continues to maintain a strong and stable financial position. Throughout fiscal year 2024, we experienced growth in occupancy as well as in community and home-based services across our continuum, reflecting the trust and confidence that residents, patients, clients, and families place in our care.

Our financial performance remained

exceptional, as we met or exceeded all key financial ratios by which we are measured. This achievement underscores our commitment to responsible fiscal management and operational efficiency. Additionally, during fiscal year 2024, we completed projects at our Heritage at Lowman and RoseCrest campuses, adding a combined 36 new courtyard pocket apartments. We also expanded our hospice program to

Newberry. By increasing our capacity, we have strengthened our ability to serve our growing communities.

As we close this year, we are proud to stand financially strong, healthy, and well-positioned for continued growth and renewal. We remain dedicated to providing outstanding service and fostering vibrant, supportive communities and programs for all those we serve.

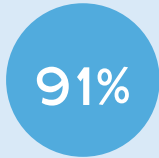


\*Consolidated financial statements audited by independent certified public accountants. The audit report can be obtained by contacting the Chief Financial Officer.

# LHSC Priority and Family Feedback

Annually, LHSC conducts surveys among residents, including family members, to assess their perceptions of various aspects of community life. These surveys cover areas such as staff performance, life enrichment activities, grounds and facilities, meals, direct care, and overall service quality. The results guide our efforts to improve and highlight our successes.

“Would you recommend Lutheran Homes of SC to others?”



Among all the questions asked, the most valued received a high mark.

“

### the Heritage at Lowman

“My mother is at Bethany memory care unit and we are very pleased with her care.”

### RoseCrest

“I am very thankful my Mom is rehabbing at RoseCrest.”

### Rice Estate

“I like Rice Very much, wonderful friends and think of it as home.”

### Franke at Seaside

“I am happy to live at Franke!”

### Trinity on Laurens

“...it has been a pleasure living here for the past 3 years.”

### BeWell Home Services

“I am so pleased with what BeWell did for me and our family—your responsiveness to our needs was quite amazing.”

### BeWell@Home

“BeWell@Home gives me the confidence to age in place, knowing I never will be alone. I have a trusted team ready to support me for whatever comes next.”

# Lutheran Hospice Receives Positive Feedback

Lutheran Hospice consistently outperformed both state and national averages across all eight criteria assessed by the U.S. Centers for Medicare & Medicaid Services.

Willing to Recommend this Hospice



Lutheran Hospice



National Score

“

### Lutheran Hospice

“My entire hospice team was wonderful.”

“Mom’s care was so professional and heartwarming.”



# Five to Thrive | Celebrating Excellence

The Five to Thrive (5TT) Initiative champions excellence in customer service and TeamMate appreciation. Through the 5TT High Five Club, Priorities—residents, patients, and clients—can recognize TeamMates who go above and beyond. A structured three-point nomination and review process leads

to monthly, quarterly, and annual TeamMate recognitions. Winners are celebrated during special 5TT workplace events and awarded Points of Praise (POP Points), redeemable for Amazon gifts. By fostering meaningful interactions, 5TT strengthens a culture of appreciation and service excellence.



## 2024 LHSC TeamMate of the Year | 2500 Points



Loretta Hampton began her caregiving journey with Lutheran Hospice – Midlands in October 2003 and was promoted to Lead Certified Nursing Assistant in January 2010. Her unwavering dedication and compassionate approach to end-of-life care have now earned her the distinguished honor of being named the 2024 5TT High Five Club TeamMate of the Year.

One family caregiver shared a heartfelt reflection after her husband passed, recalling how Loretta's presence in their home was a source of comfort. She remembered the gentle yet determined way Loretta encour-

aged her loved one to accept a bath—never accepting 'no' for an answer, but always with kindness and humor. With every interaction, Loretta transformed routine care into moments of dignity and connection, leaving a lasting impression on the family that extended far beyond her time in their home.

Loretta's dedication and kindness have touched countless lives, offering comfort when it is needed most. Her recognition as TeamMate of the Year is a testament to the profound impact of her work and the deep appreciation of the families she has served.

## 2024 LHSC TeamMates of the Quarter | 500 Points

### Quarter 1

Ms. Melinda O'Conner,  
Transportation, RoseCrest  
Ms. Rodeshia Williams, Director  
of Life Enrichment, RoseCrest  
Ms. Tawanna Hamilton,  
Financial Manager, RoseCrest

### Quarter 2

Ms. Gladys Harris,  
Environmental Services  
Assistant, Rice Estate

### Quarter 3

Ms. Loretta Hampton,  
Lead Certified Nursing Assistant,  
Lutheran Hospice – Midlands

### Quarter 4

Ms. Kuantella Chavis,  
Transportation, Rice Estate

## the Heritage at Lowman | A Legacy of 50 Years



For 50 over years, Wyman Kessler has been a dedicated caregiver at the Heritage at Lowman, following the path set by her mother and grandmother, both nursing assistants. In 1974, Wyman applied for a housekeeping job, but when none were available, she stepped into a nursing assistant role—a decision that shaped her life and career.

For Wyman, the Heritage is more than just a workplace; it is also a part of her family's legacy. Seven of her siblings have also worked there, strengthening their deep connection to the community. Wyman credits her long, fulfilling career to one simple belief: "Treat every resident like family."

Ms. Wyman's dedication has earned her the South Carolina LeadingAge "Excellence in Caring Award" and recognition as a Five to Thrive Program "High Five TeamMate of the Month" at Lutheran Homes. A Priority family expressed their appreciation, saying, "We are most appreciative for all the little extra things Wyman does."

For over five decades, Wyman's small acts of kindness have made a big difference. Frank Shepke, CEO notes "she is the embodiment of our mission." Her story is a testament to the power of compassion, family, and lifelong commitment—creating lasting impacts in the community.

## Rice Estate | Enhancing Comfort and Care

Rice Estate proudly unveiled the newly modernized Evergreen Way Suites, an inviting assisted living setting designed to enhance both comfort and a sense of shared community. With eight thoughtfully designed suites, this intimate setting provides a warm, homelike atmosphere where residents receive personalized care in a close-knit environment.

A standout feature of Evergreen Way Suites is its spacious two-room suites, a unique offering in the local market that provides residents with extra space for comfort and privacy. The refreshed design includes beautifully updated interiors, enhanced lighting, and accessible features, all aimed at creating a welcoming and functional living space. Residents also enjoy direct access from the common living room to a beautiful courtyard garden and patio, offering a peaceful retreat for

relaxation and socialization. The suites are conveniently located just steps from the renovated main dining room, ensuring easy access to delicious meals and social gatherings.

tune with the Evergreen Way name."

Rice Estate's commitment to excellence is widely recognized, as Lutheran Homes is named Best Assisted Living by Columbia Metropolitan Magazine's reader survey for an

impressive 12 consecutive years. This renovation reflects our ongoing dedication to providing the highest quality care in an environment that truly feels like home.

Discover the beauty of Evergreen Way for yourself.

**Scan the QR code or [click here](#) to take a closer look.**



Scan to Watch Video





## RoseCrest | A New Era of Living

RoseCrest blends innovation and comfort with the unveiling of its new Courtyard Apartments and The Commons community center, expanding opportunities for connection, convenience, and quality care.

The award-winning Courtyard Apartments offer a fresh take on independent living, combining privacy with a strong sense of community. These thoughtfully designed residences feature spacious layouts, modern finishes, and abundant natural light. Positioned around a charming courtyard, they provide a peaceful retreat where residents can relax, socialize, and enjoy nature



just steps from home. With easy access to campus amenities and RoseCrest's full continuum of care, residents maintain their independence while benefiting from added support.

Complementing the apartments, The Commons serves as the vibrant heart of community life. This expanded two-story hub features a beautifully

appointed dining venue, inviting lounges, and versatile spaces for programs and wellness. A standout addition is the new chapel, a serene space for worship and reflection, highlighted by stunning stained glass.

New Courtyard residents Raymond and Margery Haas share, "The floor plan is fabulous... we're enjoying the fellowship of our Courtyard neighbors and all the programs and activities here—bringing us happiness and comfort..."

These enhancements enrich residents' lives, creating a welcoming environment where they can thrive.

**Scan the QR code or [click here](#) to explore all that's new at RoseCrest!**

Scan to Watch Video



## Franke at Seaside | The Heartbeat of Franke

At the heart of Franke at Seaside, a vibrant pulse of creativity and connection thrives through our resident-generated monthly newsletter, *The Franke Flyer*. A talented group of resident editors and contributors patiently research and brainstorm story ideas focused on 'everything Franke.' It has become more than just a collection of news and updates; it is a testament to the lively spirit and camaraderie that defines our Franke community.

From heartwarming personal stories, creative literary pieces, humorous anecdotes, and insightful interviews with both residents and teammates, *The Franke Flyer* reflects the beautiful diversity of those who choose to call Franke "home." Contributions come from residents and TeamMates from all backgrounds and walks of life, fostering a sense of belonging and shared purpose.

Flipping through the 2024 editions, you might discover a feature on a

new resident who specializes in art restoration, an update on a longtime culinary staffer expecting twins, details about an upcoming resident-led "Franke University" class on the Progressive Era, or an invitation to join the Seaside Strummers, our ukulele group. The pages are also filled with creative stories, poems, and musings, highlighting the remarkable talents of our residents. Serving as both a mirror and a beacon, it reflects the vibrant tapestry of experiences and perspectives that make our community unique.

Looking back on another year of community, *The Franke Flyer* stands out as a shining example of what makes Franke at Seaside so special. It is a living, breathing testament to the power of collaboration, creativity, and shared experiences. Franke is truly blessed for this gift bestowed upon us by those we serve. Here's to many more editions filled with laughter, wisdom, and the enduring spirit of our residents.



## Trinity on Laurens | Tiny Voices Bridging Generations

Trinity is proud to partner with Mead Hall School, the parish day school of St. Thaddeus Episcopal Church and our downtown neighbor. Each month, the



4K-5K class visits with a plan and a purpose—fostering meaningful connections between young children and senior residents. These interactions help bridge the generational gap, bringing joy, laughter, and a renewed sense of purpose to all involved. The presence

of young children brightens spirits and enhances the emotional well-being of older adults, helping to reduce feelings of isolation.

Stephanie Crump, who organizes the monthly visits and teaches the class, explains:

“Our visits to Trinity are part of our service-learning curriculum. Singing and visiting with residents provide a meaningful way for 4- and 5-year-olds to engage in community service. It’s age-appropriate and entirely their own effort—not that of a parent or guardian. We prepare by selecting songs, poems, and themes that align with the season or what we are learning in class. Two weeks before each visit, we begin practicing for about 15 minutes each afternoon—short and frequent rehearsals work best for this age group.

The children take great pride in their performances and eagerly anticipate our monthly visits. It’s also an opportunity for them to practice conversation

skills. We discuss questions they can ask residents, such as their favorite color, food, candy, or animal. The children enjoy visiting just as much as performing.”

For one Trinity and Mead Hall family, these visits bring three generations together, creating truly special moments. It is heartwarming to see our resident’s face light up as he watches his great-granddaughter sing and perform.

Beyond the immediate joy these interactions bring, they instill the value of community service at a young age. Kindergarteners learn that giving back—especially by providing companionship—can be a fulfilling and rewarding experience. In this way, visits to Trinity not only enrich the lives of older adults but also nurture lifelong values of kindness and compassion in young children.

We are grateful for this partnership and look forward each month to our lobby being filled with tiny voices, big smiles, and boundless enthusiasm!

## Lutheran Hospice | Expanding 5-Star Care

Lutheran Hospice proudly celebrated two milestones—earning a 5-star rating from the Centers for Medicare & Medicaid Services (CMS) and re-establishing services in Newberry, SC. These achievements highlight our commitment to compassionate, high-quality hospice care across the state.

As the only statewide hospice in South Carolina earning a 5-star CMS rating at the time, this recognition is based on family caregiver feedback, highlighting the support and clinical

excellence our team provided to both patients and their families. Our team consistently surpassed state and national benchmarks in pain and symptom management, communication, emotional and spiritual support, and overall family satisfaction.

**Scan the QR code or [click here](#) to see our Patient Outcome Report Card.**

We are also thrilled to restore hospice services in Newberry. Thanks to the generosity of Bethany Lutheran Church and the family of Betty Jean

Long Dominick, our new office now operates from the church’s former parsonage. In August, we marked this expansion with a ribbon-cutting ceremony and community health fair, welcoming local leaders and health-care partners.

With nearly three decades of service, Lutheran Hospice remains dedicated to honoring life, providing comfort, and supporting families when they need it most. Whether through our 5-star-rated care or the expansion of our services in Newberry, we are honored to continue this vital ministry—because every moment matters.



## BeWell Home Services | Sunny Side Up



Army veteran Richard “Dick” Link retired after 42 years as a controller at HSBC Bank in Manhattan, settling in Mount Pleasant with his wife, Evelyn. After 25 years in Snee Farm, they moved to Franke at Seaside’s Active Lifestyle Community, where they thrived.

Following Evelyn’s passing in 2021, Dick sought support from BeWell Home Services after a fall. “My problem was balance,” he shared, adding that he wanted to remain in his Franke active lifestyle apartment. His first caregiver, Latarsha, made an instant impression. With a grin, he recalled, “It was love at first sight, but don’t snitch on me!”

BeWell caregivers help Dick maintain his independence. “The hard part is getting dressed—I’m not good with buttons,” he admitted. “They’re always around if I need help, and they

make me work out three days a week, keeping me going with the NuStep and chair exercises.” A devoted football fan, he proudly said, “I got Avis (BeWell caregiver) watching football, even when she’s not here—she didn’t like it at all before!”

What does he appreciate most? “It’s how I’m treated,” he said. “Breakfast is my favorite meal, and they make my sunny-side-up eggs perfectly—it starts my day off right.”

With his upbeat spirit and a smile as bright as his eggs, Dick embraces each day with humor, gratitude, and the support of his BeWell caregivers—always living life sunny-side up.

## BeWell@Home | Never Alone, Walking Together

Doris Hughes moved to Mount Pleasant about 20 years ago after her husband passed away and has since grown fond of her home, just a short walk from the Franke at Seaside campus.

Over time, Doris became interested in using the Franke fitness center and was referred to BeWell@Home to explore her options. During a home visit, the program director reviewed her long-term care policy, which was good but had some gaps. Doris was also concerned about rising premiums. “I want to stay by myself,” Doris explained, “and have people come in when I need help.”

Doris was offered several BeWell@Home options to supplement her existing policy, which also allowed her access to some of Franke’s programs. “It just made sense,” she said.

In 2017, Doris became the 26th member of BeWell@Home. For many years, she enjoyed good health, main-

taining her independent lifestyle at home while participating in Franke’s life enrichment programs. When her health began to decline and without children to rely on, Doris turned to BeWell@Home for support, especially from her wellness coordinator, Brittany Hutson-Wilgus.

Brittany coordinated transportation, arranged care for daily living, attended doctor appointments, and even filed Doris’ long-term care insurance claim. “She has never failed to come through when I’ve needed her,” Doris said, adding that Brittany often went above and beyond.

Doris says BeWell@Home helps her maintain her quality of life, but she’s especially grateful for Brittany. “I don’t know what I would’ve done without her. I can tell her things I can’t tell anyone else. When you walk alone in this world, you need one person to walk with you, and Brittany is that person,” Doris shared.

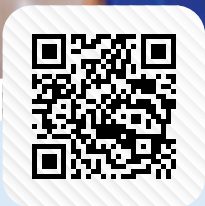




# Lutheran Homes of South Carolina

*promoting the well-being of older adults*

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