



LUTHERAN SERVICES
FOR THE AGING

A Ministry of the North Carolina Synod of the Evangelical Lutheran Church in America

January 27, 2010

Mr. Chris Taylor
The North Carolina Medical Care Commission
701 Barbour Drive
Raleigh, NC 27603-2009

Re: Community Benefits Filing

Dear Mr. Taylor:

Enclosed please find the Community Benefits Report for the fiscal year ended September 30, 2009.

If you have any questions or concerns regarding this, please do not hesitate to contact me.

Sincerely,

Annette S. Conrad, CPA
Chief Financial Officer

Enclosures

The North Carolina Medical Care Commission
Reporting for Community Improvement and Charity Care/Community Benefit by a
Continuing Care Retirement Community (CCRC)

Community Improvement Relationships is an active process CCRC linking with the community agencies and organizations responsible for assessing and planning to meet the health and other needs of the community. CCRCs are expected to connection with these agencies and organizations to better define how the CCRC can use its particular strengths and talents to meet community benefit needs.

Charity Care is the unreimbursed costs to the facility of providing health care, housing, or other services to a resident who is uninsured, underinsured, or otherwise unable to pay for all or part of the services rendered. (Session Law 2001-17; GS 105-278.6A). Most likely the first priority identified by a CCRC for charity care/community benefits would be to provide charity care for its residents.

Community Benefits are the unreimbursed costs to the facility of providing the following:

1. Services, including health, recreation, community research, and education activities provided to the community at large, including the elderly.
2. Charitable donations.
3. Donated volunteer services
4. Donations and voluntary payments to government agencies.
(Session Law 2001-17; GS 105-278.6A)

POLICY:

The CCRC shall submit at the time of borrowing and every year thereafter commencing with fiscal year ending in calendar 2001 the following information to the Medical Care Commission as long as the CCRC has outstanding North Carolina Medical Care Commission debt.

1. North Carolina Medical Care Commission, Executive Summary of the CCRCs Community Improvement Relationships.
2. North Carolina Medical Care Commission, Charity Care/Community Benefit Report
3. Any supplemental reports that describe Charity Care/Community Benefit programs and cost/expenses (e.g. IRS Form 990, Section III, annual reports, etc.)

North Carolina Medical Care Commission
Executive Summary of the CCRCs Community Improvement Relationships
Continuing Care Retirement Community (CCRC)

Organization: Lutheran Services for the Aging, Inc. Date: 9/30/2009

1. Statement of the CCRCs mission and commitment to charity care/community benefit.

Lutheran Services for the Aging, Inc. Mission Statement: Lutheran Services for the Aging is a ministry of the North Carolina Synod of the Evangelical Lutheran Church in America. We strive to express God's love in Christ to older adults by: providing multiple services for seniors including nursing care, adult day care, and retirement living; ministering to their needs in traditional and innovative ways; and demonstrating responsible stewardship.

Being that we are a ministry and a not-for-profit organization, we feel our mission is to serve older adults of all faiths, race, religions and income status. Our marketing materials indicate this.

We accept Medicaid residents and often find ourselves writing off the non-reimbursable expense for care.

2. Describe geographic service area and target populations for community benefits.

The main geographic area for service is the State of North Carolina, specifically the counties of Rowan, Stanly, Catawba, Forsyth, Buncombe, especially when we are referring to nursing residents who receive charity care. Mostly, we are targeting the senior adult who is need of immediate nursing care. A new facility will be located in New Hanover and is expected to open in October 2010.

For those who are to be recipients of charity benefits in the community at large, we target college students, young children, the homeless, EMTs, hospitals, churches and pastors and seniors in the community. Examples of outreach are attached.

3. Describe the relationships with agencies and organization with in the community.

We have a close service-oriented relationship with many local organizations including hospitals, Senior Centers, homeless shelters and food bank, local colleges, first responders, Chamber of Commerce, numerous civic groups and local churches. We make an effort to routinely develop relationships within the community in order to contribute our time and areas of expertise.

4. List current community benefit programs.

Please see attachment.

Detailed Application for Property Tax Exemption Under G.S. 105-278.6A

(C) Donated Volunteer Services

(Cost to the facility for allowing employees to volunteer in community service projects or organizations and/or actual unreimbursed facility material, space and volunteer time as documented based on wages paid by the facility for the volunteer during the service period/project)

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(D) Donations and Voluntary Payments to Government Agencies

(Amounts to be taken from Receipted donations/payments from government agency receiving donation/payment when the facility would otherwise not have to pay the agency – goodwill.)

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Total Community Benefits

(3) 153,160

Total Community Benefits and Charity Care (2) + (3)

(4) 7,208,162

Percentage of Resident Revenue

Total Community Benefits and Charity Care Divided by
Total Resident Revenue

(4) 7,208,162
(1) 56,741,686

Percentage of Resident Revenue (4) divided by (1)

12.70 %

Exclusion Percentage Based on Percent of Resident Revenue Above

% of Revenue	Exclusion %
5%	100%
4%	80%
3%	60%
2%	40%
1%	20%

Exclusion % 100

Facility

Name

Lutheran Services for the Aging County Rowan, Stanly, Catawba
Forsyth, Buncombe

Facility

Address

P.O. Box 947, Salisbury, NC 28145-0947

By Signing Below We Hereby Certify the Information Stated Above is Correct and True as Supported by Our Financial and Facility Records:

Annette Conrad
Officer's Signature

Date 1/27/2010

Community Benefits – 2009 – Trinity Oaks Campus

- Fill That Bus Campaign – collected 1,085 pounds of food for Rowan Helping Ministries as part of the National Day of Service – 31 hours
- Crafty Ladies – made afghans and quilts for Victory Junction Gang Camp – 100 hours
- Literacy Council in Rowan County – 200 hours
- Rowan Helping Ministries – serving food at shelter and other weekly service – 369 hours
- Kiwanis Pancake Festival and other Kiwanis activities – 100 hours
- Tutoring elementary students at local schools – 530 hours
- Junior Civitans – wrapped Christmas gifts for needy families – 6 hours
- Rowan Helping Ministries – conducted Christmas food drive – 10 hours
- Served on board of director for Rowan Helping Ministries – 24 hours
- Fundraiser for Rowan County Literacy Council – Scrabble Scramble – 62 hours
- Participated in National Food Drive sponsored by Rowan Helping Ministries and USPS – 7 hours
- Communities in Schools volunteers – 520 hours
- Food Over the Weekend – snack program for local children – 260 hours
- Adopt-a-School program – 104 hours
- Volunteered at local Homeless Shelter – 192 hours
- Volunteered at Spencer Train Station – 20 hours
- Participated in Magazines for the Military – 25 hours
- Participated in Tools for Schools projects and packed backpacks – 65 hours
- Trinity Oaks Ringers and Singers – provided music to numerous churches, charities, etc – 160 hours
- Sponsored Senior Health Day in May – 149 hours
- Participated in United Way Day of Caring for Rowan County – 96 hours
- Intergenerational programming with First Presbyterian Youth Group – 110 hours
- AAHSA Advocacy call – 3 hours
- Participated in Flight of Honor program – 80 hours
- Provided meeting space for community organizations – 130 hours
- Intergenerational activities with Catawba College – Harvest Moon Ball – 500 hours
- Rowan Helping Ministries – food drive for peanut butter, rice, sugar and beans – 300 hours
- Rowan County Quilt Show – 285 hours
- Held Alzheimer's Memory Walk and Fancy Footwork project to raise awareness for the Alzheimer's Association – 1,075 hours
- Served as site for Social Work intern from Livingstone College – 1,404 hours
- Participated in giving to United Way through payroll deductions or cash contributions
- Sponsored and provided meeting space for Alzheimer's Support Group – 48 hours
- Sponsored and provided meeting space for Rowan County Bereavement Support Group – 156 hours
- Participated in Cancelled Stamps Project benefiting not-for-profit entities – 400 hours

Community Benefits – 2009 – Trinity Oaks Campus (Continued)

- Served as site for Social Work intern from University of North Carolina – Charlotte – 295 hours
- Clinical site for Rowan Cabarrus Community College for Nurse and CNA programs
- Clinical site for High School Health Occupations Students to become CNA's - currently accommodating 100 students per week - 1250 hours
- Agreement with Rowan County Department of Social Services to provide emergency placement of elderly community residents (Free Services)
- Provide emergency shelter in the event of natural disaster
- Partner with Hood Seminary - 20 hours

Total number of community hours = 9,086 hours at \$10 per hour or \$90,860

Community Benefits – 2009 – Abundant Living Adult Day Services

- Collected items and assembled personal care kits for residents of Rowan County Women's Shelter – 9 hours
- Various programs at Wiley Lash Headstart – 74 hours
- Collected old phone books for Recycling Rowan County – 9 hours
- Collected soap, shampoo and various toiletry items for homeless shelter sponsored by Rowan Helping Ministries – 10 hours
- Collected can tabs for Ronald McDonald House – 8 hours
- Collected box tops for education for Rowan County Schools – 8 hours
- Participated in Festival of Trees (ARC of Rowan) – 10 hours

Total number of community hours – 128 hours at \$10 per hour or \$1,280

Community Benefits – 2009 – Lutheran Home – Albemarle

- Prepared and served lunch at Community Table for Martin Luther King Jr. Day activities – 76 hours
- Served as a referral location for juvenile court referral to perform community service – 100 hours
- Served with Stanly County Schools Transition program – 200 hours
- Served as site for court-ordered community service for individuals – 48 hours
- Participated in Thrivent Join Hands Day and planted flower beds and painted offices - 224 hours
- Collected and donated coats and jackets to Stanly County Christian Ministries – 8 hours
- Hosted breakfast for local firefighters, EMS and police – 18 hours
- Participated in area United Way campaign

Total number of community hours – 674 hours at \$10 per hour or \$6,740

Community Benefits – 2009 – Crescent View

- Participated in Make a Difference Day for Skyland Fire Department – 20 hours
- Hosted Trick or Treat for Nativity Lutheran Church – 4 hours
- Performances at Pine Park Retirement Center by Crescent View Singers – 40 hours
- Sponsored Harvest Festival for community – 11 hours
- Collected clothing and household items for ABCCM – 176 hours
- Supported Lion's Club Christmas Tree Sale – 2 hours
- Assisted Brownie Troop #88 with merit badge projects – 24 hours
- Sponsored Nativity Lutheran Pre-School Christmas gathering – 24 hours
- Hosted Women of the Evangelical Lutheran Church in America (WELCA) group luncheon – 28 hours
- Made and sold Christmas ornaments for local United Way – 8 hours
- Held month long food drive for Manna Food Bank – 48 hours
- Served as host site for Lions Club Annual Board meeting – 5 hours
- Hosted National Day of Service celebration of diversity – 44 hours
- Performance at Good Friday Service by Crescent View Singers – 36 hours
- Sponsored 1st Annual Easter Egg Hunt and Breakfast for community – 80 hours
- Held Volunteer Appreciation Reception for volunteers in community – 4 hours
- Conducted spring drive for ABCCM – 80 hours
- Performance at Arbor Terrace, a local assisted living facility, by Crescent View Singers – 42 hours
- Participated with Lutheridge Confirmation Camp in a car wash – 36 hours
- Performance at Beystone Rehabilitation by Crescent View Singers – 40 hours
- Conducted two week long food drive for Manna Food Bank – 24 hours
- Put together care packages for troops - 4 hours
- Sponsored hot dog social and set up for Relay for Life – 20 hours
- Performance at Walden Ridge by Crescent View Singers – 40 hours
- Collected school supplies for local schools – 40 hours
- Project Linus – Residents sew blankets and dolls for area hospital to give to newborn babies – ongoing
- Collected empty pill bottles to donate back to the American Red Cross
- Served as host site for Valley Springs Lions Club dinners twice per month

Total number of community hours – 880 hours at \$10 per hour or \$8,800

Community Benefits – 2009 – Lutheran Home – Hickory West

- Participated in Rotary Club – 19 hours
- Served on Pfeiffer University Alumni Board – 10 hours
- Conducted drive for school supplies for needy children – 8 hours
- Participated in Christmas Adventure with local church – 30 hours
- Served as site for blood drive for American Red Cross – 17 hours
- Conducted food drive for Cooperative Christian Ministries - 4 hours
- Collected kits to send to soldiers serving overseas – 16 hours
- Served as mentor for area student's graduation project – 40 hours

Total number of community hours – 144 hours at \$10 per hour or \$1,440

Community Benefits – 2009- Lutheran Home – Hickory

- Sponsored Meet and Greet session for community to meet local Ombudsman – 51 hours
- Sponsored health fair at St. Stephen's Lutheran School – 4 hours
- Collected cards for local hospital to use on trays – 18 hours
- Provided Halloween treat bags for homeless shelter – 14 hours
- Held quarterly memorial services for families that lost loved ones - 24 hours
- Provided meeting site for Elvis and Friends group – 58 hours
- Sponsored community-wide Ministerial Appreciation breakfast – 4 hours
- Sponsored Safe Nite Halloween for community – 163 hours
- Made cards for Adopted Soldier program – 14 hours
- Intergenerational programming with First United Methodist youth – 49 hours
- Sponsored 2nd Annual Candlelight Reflections service to honor families and caregiver coping with Alzheimer's – 45 hours
- Participated in local Memory Walk – 14 walkers participated and raised \$1,300 – 28 hours
- Served as meeting site for Catawba Valley Ministerial Association – 7 hours
- Collected water bottles and snacks for homeless – 7 hours
- Provided Thanksgiving Eve service for community – 55 hours
- Provided site for college intern – 20 hours
- Served as concert site for Carolina Moonlighters – 47 hours
- Served as concert site for Kids In Concert – 39 hours
- Served as recital site for Greater Piedmont Dance – 37 hours
- Served as concert site for local students – 45 hours
- Rehearsal site for Christmas play for Bethany Lutheran Church – 45 hours
- Made table favors for local senior citizens group Christmas dinner – 45 hours
- Served as site for blood drive for American Red Cross – 4 hours
- Served as concert site for Catawba Valley Community College chorus - 42 hours
- Served as rehearsal site for Bruce Long Orchestra – 47 hours
- Served as concert site for Suzuki School of the Arts – 46 hours
- Hosted Christmas Eve Service for community – 65 hours
- Worked with two local churches in Winterfest project by collecting and delivering 100 coats to homeless – 12 hours
- Baked and delivered cookies for homeless – 14 hours
- Hand-made Valentine's Day cards for soldiers serving abroad – 27 hours
- Hosted Sweetheart Dinner for community – 52 hours
- Hosted Valentine's Day Party with St. Aloysius Catholic Church – 75 hours
- Participated in intergenerational service project with 20 college students from across the state – 60 hours
- Served as concert site for local piano students – 37 hours
- Served as service project site for Lenior-Rhyme University students – 20 hours
- Hosted Ash Wednesday service for community – 35 hours
- Served as service project site for St. Stephen's Lutheran Church – Missouri Synod confirmation students – 35 hours
- Served as concert site for local homeschooler group concert – 44 hours
- Delivered bread and socks to local homeless shelter – 2 hours
- Delivered cards and candy to local homeless shelter – 2 hours

Community Benefits – 2009- Lutheran Home – Hickory (Continued)

- Served as project site for service project with Christian Family Academy – 25 hours
- Intergenerational programming with Friendship Lutheran Church Youth group – 28 hours
- Badge project for two area Girl Scouts – 6 hours
- Hosted community Red Hat Society Social – 38 hours
- Hosted Easter Egg hunt for community with Girl Scout Troop #847 – 32 hours
- Served as concert site for First Baptist Youth – 32 hours
- Hosted Maundy Thursday service for community – 4 hours
- Made peanut butter and jelly sandwiches for homeless shelter – 12 hours
- Hosted Good Friday service for community – 4 hours
- Served as project site for service project for St. Stephen's High School Civics class – 10 hours
- Conducted service project to benefit Humane Society – 9 hours
- Intergenerational service project for Lenior-Rhyne soccer team – 44 hours
- Hosted end-of-year ice cream party for St. Stephen's Bridges students – 32 hours
- Hosted intergenerational activity with Girl Scout Troop #847 – 24 hours
- Intergenerational community event with NC Piedmont Tractor Association – Wild West Animal Round-up – 63 hours
- Hosted Senior Games for five area nursing facilities and community – 260 hours
- Hosted Fireman/Policeman breakfast – 16 hours
- Hosted Spelling Bee competition for five area nursing facilities and community – 15 hours
- Served as service project site for Zion Lutheran Church Youth group – 19 hours
- Served as concert site for Unifour Chorus – 22 hours
- Served as service project site for People's Bank Bingo event – 24 hours
- Made craft sale items for the WELCA craft sale – 220 hours
- Hosted Unifour Social Workers' luncheon – 16 hours
- Participated in Family Christian Store's Day of Sharing – 12 hours
- Made 50 snack bags to deliver to homeless shelter – 7 hours
- Service projects for youth at East Hickory Baptist Church – 20 hours
- Participated in Hand On Hickory with Lenior Rhyne University in outreach project for US troops – 146 hours
- Hosted September 11th Remembrance service for community – 45 hours
- Hosted Shepherd Society Dinner to honor volunteers – 48 hours
- Served as meeting site for Alzheimer's Support group – 20 hours
- Served as meeting site for Western Piedmont Activity Professionals Association – 4 hours
- Served as site for Lenior-Rhyne Exercise Science Senior Fitness program – 125 hours

Total number of community hours – 2,820 hours at \$10 per hour - \$28,200

Community Benefits – 2009 – Lutheran Home –Winston-Salem

- ALS Walk – fundraiser for Lou Gehrig's Disease – raised \$200 – 4 hours
- Provided site for K-9 unite and SWAT unit training – 488 hours
- Hosted Fall Festival for community – 120 hours
- Conducted food drive for Samaritan Ministries – 10 hours
- Hosted Veterans Day event - 6 hours
- Served on Advisory Board for Forsyth Tech – 4 hours
- Served breakfast to local firefighters – 14 hours
- Participated in area United Way Campaign
- Sponsored hot dog sale to raise funds for Horizons Christmas project – 10 hours
- Sponsored children in Horizons project for Christmas – 50 hours
- Participated in health fair at Wake Forest School of Medicine – 6 hours
- Held Martin Luther King celebration for community – 10 hours
- Participated in Aging Resources Speakers Board – 8 hours
- Served meal at Samaritan Ministries Soup Kitchen – 15 hours
- Collected bingo prizes and called bingo games for Salem Kidney Dialysis – 4 hours
- Participated in Black History Month activities at Wake Forest – 2 hours
- AAHSA advocacy group – 2 hours
- Held hot dog fundraisers for local families in need – 6 hours – raised \$219
- Collected 340 books for Sheppard Center – 10 hours
- Participated in blood drive for American Red Cross – 10 hours
- Hosted cookout for Police Officer Appreciation Day – 3 hours
- Provided CPR training free of charge to Elks lodge – 6 hours
- Participated in Join Hands Day – 28 hours
- Provided site and luncheon for Coalition for Senior Adults meeting – 10 hours
- Hosted Mother's Day luncheon – 18 hours
- Sponsored Father's Day Car Show for community – 100 hours
- Sponsored Proud Patriot Day Celebration on July 4th for community – 60 hours
- Sponsored food drive in honor of Alder's Point fire victims – collected 244 pounds of food for Second Harvest Food Bank – 20 hours
- Participated in Memory Walk for Alzheimer's – 12 hours
- Collected small blankets, pillow and chew toys for Human Society – 3 hours
- Hosted luncheon for area clergy – 8 hours

Total number of community hours – 1,047 hours at \$10 per hour or \$10,470

Community Benefits – 2009 – Lutheran Services for the Aging, Inc.

- Participation in weekly Civitans meetings – 50 hours
- Participation in weekly Rotary meetings – 50 hours
- Participation in Rowan Senior Advisory Committee - 8 hours
- Volunteered at Soup Kitchen and Laundry at Rowan Helping Ministries – 12 hours
- Work at polls – 3 hours
- Participated in MLK Day Food drive – 4 hours
- Participated in United Way campaign and meetings – 16 hours
- Participated in Special Olympics – 12 hours
- Participated in Shaker's Dance for disabled adults – 4 hours
- Usher at Piedmont Players Community Theatre – 16 hours
- Donated computers and printers to Students in Training program – 3 hours
- Mentoring students at Catawba College and Hanford-Dole Elementary – 30 hours
- Served on United Way Allocations committee – 12 hours
- Participated in United Way Day of Caring – 6 hours
- Worked on Chamber of Commerce membership Drive – 30 hours

Total number of community hours – 256 hours at \$10 per hour - \$2,560

Community Benefits – 2009 – LSA Elms at Tanglewood, Inc.

- Made bookmarks for WELCA conference – 80 hours
- Served as volunteer for West Forsyth High School Anchor Club – 32 hours
- Served as site for Girl Scouts to earn merit badges – 12 hours
- Prepared Valentine Treat bags for 120 2nd graders at Clemmons Elementary – 43 hours
- Performed at neighboring facility by the Ding-a-Lings (handbell group) – 4 hours
- Baked cookies and delivered to local fire department – 6 hours
- Participated in intergenerational programming with West Forsyth Christian Preschool – 24 hours
- Provided Family Night and Caregiver Support meetings on a monthly basis – 24 hours
- Hosted breakfast for local American Legion group – 8 hours
- Provided musical entertainment for cookout for five facility cookout – 45 hours
- Conducted Food Drive for Food Pantry – ongoing project
- Hosted social for local police department – 3 hours

Total number of community hours - 281 hours at \$10.per hour - \$2,810

Grand Total – 15,316 hours at \$10 per hour - \$153,160