Four Communities. One Outreach. One Mission.
Improving lives through communities, services, and outreach
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*Honorary Life Member

Frances C. Waser
Nov. 9, 1934 - Nov. 10, 2016
A “Builder of the Dream” and Honorary Life Member of the Board of Directors, Fran was a mentor, friend, and passionate advocate for Givens’ mission and ministry. She served on the Board for more than 30 years, including 20 years as Secretary of the Executive Committee.
A Note from Doris
Commitment, Caring, Courage, and Collaboration

In 1977, we had one campus, two employees, no residents, and buildings 1 through 11 were under construction on the Givens Estates campus. Our annual budget was less than $150,000 a year. 40 years later, we now have four campuses, 540 employees, and serve 1,200 residents with an annual budget of $50 million.

As we have grown, our core values - commitment, caring, courage, and collaboration - have remained the same. We are committed to improving lives through communities, services, and outreach. We care for our residents and staff as our own. We have courage to pioneer new and innovative ways to address the increasing need for senior housing, and we collaborate with like-minded partners who help us achieve these goals.

Givens is expanding the possibilities for aging, and living out its vision statement daily. Thank you for growing with us these past years. Let’s celebrate all that has been achieved!

With Gratitude,

Doris P. Loomis
Chairperson
Givens Board of Directors
**Vision Statement**
Expanding the possibilities for aging

**Mission Statement**
Improving lives through communities, services, and outreach

**Leadership Team**
Ken Partin  
*Chief Executive Officer*

Allen Squires  
*Chief Financial Officer*

Mark Bailey  
*Director of Development*

John Cowan  
*Givens Estates Executive Director*

Ricky Foor  
*Technology Director*

Ed Hillman  
*Ministries Director*

Ken Kramer  
*Givens Highland Farms Executive Director*

Amy Staton  
*Human Resources Director*

Teresa Stephens  
*Givens Affordable Communities Director*

Cheryl Wallen  
*Givens LifeMinistries Director*

- 4 campuses (309 acres) in Buncombe (Asheville, Black Mountain) and Haywood Counties (Waynesville) with residential living occupancy averaging 95 percent.

- Rated BBB by Fitch Ratings. Only 8 of 59 North Carolina and 126 of the 1,921 nationwide Life Plan Communities are rated by Fitch.

- 1,200 residents and 540 employees

- Givens Estates’ and Givens Highland Farms’ Heath Centers both have 5-star quality ratings from Medicare. In October 2017, US News & World Report rated both health centers as “Top Performing,” a recognition given to only 15 percent of health centers in the nation.

- Through Givens LifeMinistries, over 6,000 people are impacted through outreach and collaborations with outreach partners in 13 counties.

- Resident volunteering exceeds 50,000 hours annually. If given a dollar value, this volunteer service is worth more than $1.3 million to the greater community.

- Resident Assistance Ministry - 1 in 5 residents is challenged with basic health and living expenses.

**Social Accountability Impact exceeds $6,885,000*:**
- Resident Assistance Ministry - $3,221,891
- Outreach & Partnerships - $3,664,004

*Charitable care and community benefit was reported above the state-required 5 percent of revenues. This significant investment represents benevolent care to residents of limited resources and outreach ministries in Western North Carolina.*
After four years, the third and final phase of the award-winning Creekside Apartment Homes was completed in June 2017 and is fully occupied. These homes offer one and two bedroom apartments featuring an open floor plan, large balcony, social areas, and underground parking. Residents are just a short walk to dining, the Wellness Center, and the Williams Performing Arts Center.

Future residents have reserved 23 of 24 homes for Phase Two of Meadowmont, with completion and move-ins planned for spring 2018. Phase Three is underway, with 16 of the 22 homes reserved. Construction began in late September 2017, and we anticipate new residents moving in around fall 2018. Upon completion, this three year project will add 64 new residences consisting of duplexes, fourplexes, and sixplexes to the campus. For more information, visit www.givenshighlandfarms.org.

Phases One and Three of Givens Gerber Park offer one and two bedroom apartments for annual incomes ranging between $25,800 and $29,460. Phase Three applicant qualification is in process, and we anticipate 100 percent occupancy by late January 2018. Waitlists will continue to remain open for these two phases.

Phase Two of Givens Gerber Park will open in spring 2018 offering one and two bedroom apartments for middle incomes at or above $25,801. Future residents have reserved nearly half of the 82 apartments in Phase Two, and full occupancy is expected by the spring opening. For more information, visit www.givensgerberpark.org.
Phase Two Welcomes Middle Income Seniors

Givens Gerber Park, an affordable senior living community in south Asheville, provides supportive housing for seniors with limited financial resources. Phase One opened in November 2016 with 120 one and two bedroom HUD subsidized and tax credit rental apartments. Phase Three offers 60 one and two bedroom tax credit rental apartments. And Phase Two offers 82 one and two bedroom rental apartments for middle income seniors.

As the population ages, Givens also believes that one of the most difficult challenges is providing supportive, quality, affordable housing for those with limited resources and for those with low and middle incomes. Providing housing with support services for everyone has the potential of eliminating, delaying, or minimizing the need for more costly health care. Givens remains committed to serving seniors from all economic levels.

Rental subsidies and tax credits provide affordable housing for people with incomes below $24,000 per year. However, there is a group of seniors with middle incomes of $24,000 to $40,000 per year who are unable to afford the entrance and higher monthly fees of market-rate communities. Many of these seniors are in high maintenance homes where they become socially isolated and have limited access to necessary support services. Finding ways to serve this group is one of the greatest challenges this nation faces.
The community nurse program at Givens Great Laurels and Givens Gerber Park provides a holistic approach to chronic disease management and prevention for the vulnerable population of elderly residents.

Through on site care management, advocacy, and education by a community nurse, Givens seeks to create a model which will help residents remain independent as long as possible, reducing the need for hospital admissions, readmissions, and premature admissions to skilled care facilities.

Givens Affordable Communities Director Teresa Stephens adds, “I cannot overstate the importance of our investment in this model. This is what takes us from simply being rental housing for lower income seniors, to doing what Givens communities does so well - helping older adults truly thrive in this season of life.”

Read more about this partnership with Givens LifeMinistries’ Community Nursing Program on page 12.
The New Woodshop: Crafting Memories for Years to Come

Residents have been “making sawdust” in a Givens Estates woodshop since Givens’ early years. About ten years ago, the woodshop found a home in the former Marketing Office, a three-section modular trailer. Space was limited and only became tighter as resident interest in woodworking grew and additional equipment was brought in.

To accommodate MemoryCare’s growth and plans to build a new clinic on the Givens Estates campus, the woodshop needed to be relocated once again. This time, through generous donors who funded 100 percent of the $300,000 project, a permanent, state-of-the-art woodshop was constructed along Barrett Lane, behind the greenhouse and raised gardens.

The spacious new building is 50 percent larger than its predecessor, with close to a half mile of electrical wiring and an automated dust collection system that is activated when a machine is turned on.

In July 2017, residents were invited to a Grand Opening, where they could explore the woodshop, sign up for lessons, and see some of the woodworkers’ crafts. A uniquely designed Wall of Gratitude inside the woodshop was also revealed, recognizing the volunteers and donors who made this woodshop a reality.
Williams Performing Arts Center Named

In celebration of their vision and generosity, the Williams Performing Arts Center was dedicated in honor of Givens Estates residents Hubert and Joan Williams.

Hubert and Joan have improved countless lives by supporting Givens through significant philanthropic investments in the Horace E. Bell Memorial Garden and Columbarium, named in memory of Joan’s father; Givens Gerber Park; and the newly-opened woodshop.

They also created four endowments to support the Bell Memorial Garden, Resident Assistance Ministry, future visionary programs, and outreach endeavors.

Director of Development Mark Bailey worked closely with the Williams’ over the past five years. “Hubert and Joan embody Givens’ mission. Their love for their community and neighbors is evident in their spirit of giving,” he said. “We are sincerely grateful to them and are blessed to call them residents and friends.”

(L-R) Joan Williams, Mark Bailey, John Cowan, Hubert Williams, and Ken Partin at the dedication of the Performing Arts Center.
Jamboree Brings Together Residents, Staff, Families, and Black Mountain Children

On a gorgeous Saturday afternoon in August, close to 200 residents, staff, and their families celebrated the first annual Jamboree. There was live music, arts and crafts, games, bounce houses, face painting, fairy hair, and a magician. Everyone enjoyed fair food, including corn dogs, cotton candy, popcorn, and soft pretzels.

The Jamboree came together as the result of a Givens Highland Farms resident and staff who wanted more cross-generational opportunities on campus. Residents enjoyed interacting with children during this fun-filled afternoon.

Since the Jamboree was held the week before school began, children received school supplies such as colored pencils, crayons, folders, paper, pens, highlighters, and pencil cases.

To help even more children and schools in the local community, Givens Highland Farms held a raffle with gift baskets and other door prizes donated by local merchants and vendors.
Butterfly Garden Certified as Monarch Waystation

The Monarch Butterfly Garden was created in 2015, with milkweed, blazing star, joe-pye weed, and coneflower planted in a new garden space near Givens Highland Farms’ pond.

These plantings provide Monarchs with a habitat and cover from predators, food for growing caterpillars, and nectar for migrating butterflies. Over the past two years, flowering perennials have been added to the garden that support an even larger variety of pollinators.

In May 2017, the Butterfly Garden was recognized as a Monarch Waystation, which certifies that the garden is managed safely with no pesticides or artificial fertilizers. This space is rich in plants that provide the resources necessary for Monarchs to produce successive generations to sustain their migration to and from North America and Mexico/Central America.

We are especially grateful to residents Bob and Sandy Miller and staff member Sara Surabian, whose vision for this garden brought so many butterflies to campus to be enjoyed by all.
Community Nurse Program

Givens LifeMinistries has embarked on an exciting outreach endeavor with the addition of a community nurse to provide long term wellness and support services to residents who are living at Givens Gerber Park and Givens Great Laurels.

In partnership with Givens Affordable Communities, Western Carolina University Nursing Department, and grant funding from the Health Resources and Services Administration, Givens is now able to fully implement a unique model of care that pairs housing with supportive services to our low income housing residents.

The Community Nurse is a “point of care advocate” and reassuring presence to residents. Some residents have diverse health issues and do not qualify for supporting services. Having a registered nurse working closely with Givens Gerber Park and Givens Great Laurels residents provides them with much-needed support and access to preventive screenings and counseling, wellness education, chronic disease self-management guidance, pre- and post-operative home visits, and assistance navigating the complexities of the health care system.

Working alongside each community’s Resident Services Coordinator, the Community Nurse provides residents with effective care coordination, minimizes unnecessary visits to the emergency room and hospitalizations, and helps them avoid early transitions to higher levels of care. Residents also maximize their self-care abilities, enjoy improved quality of life, and stay in their homes longer.
In the seven months following Givens Gerber Park’s opening, the Community Nurse provided more than 400 home visits to both Givens Gerber Park and Givens Great Laurels residents. This include pre- and post-procedure visits, medication reviews, and chronic disease education.

In addition to direct support to residents, the Community Nurse and Resident Services Coordinators cultivate partnerships with area organizations like MANNA Foodbank, DSS, Social Security, Council on Aging, Land of Sky, United Way, the Haywood Senior Center, and mental health providers to enrich the lives of the residents.

**Givens LifeMinistries’ Impact**

Through Givens LifeMinistries, over 6,000 people are impacted annually through outreach partners in 13 counties.

**MY Meds Medication Assistance Ministry**

In 2016, MY Meds provided 107 uninsured and underinsured clients living in Mitchell and Yancey counties with 234 prescription medications, valued at over $200,000. Through MY Meds, clients can now also access free or low cost hearing aids, glasses, nebulizers, and sleep apnea equipment.

**Baby Equipment And Resource (B.E.A.R.) Closets**

In 2016, this vital community outreach served nearly 2,162 families and nearly 4,800 children in five locations. The B.E.A.R. Closet outreach ministries will grow to six in December 2017 with the addition of the Haywood Parish B.E.A.R. Closet at Francis Cove United Methodist Church.

**Medical Equipment Loan Closets**

In December 2017, a partnership between Clarks Chapel and Alexander Chapel opened a Medical Equipment Loan Closet to serve families in Weaverville. Two other medical equipment loan closets in Swannanoa and Candler already serve more than 400 individuals and their families each year.

**Welcome Tables**

12 locations served over 88,000 meals and provided more than 3,800 free health screenings.

**Diabetes Program**

In October 2017, twenty-one Givens Gerber Park and Givens Highland Farms residents completed a 6-week series called “Pre-Diabetes and Diabetes – The Basics and Living Well.” Director Cheryl Wallen provided them with tools to prevent Type 2 diabetes and better manage their blood sugar.
# Consolidated Financial Statements
## 2014-2016

(000 omitted)

As of December 31:

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<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
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<td><strong>Assets</strong></td>
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<tr>
<td>Current Assets</td>
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<td>Property &amp; Equipment, Net</td>
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<td>Other Non-Current Assets</td>
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<td>Total Assets</td>
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<th>2016</th>
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<th>2014</th>
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<tr>
<td><strong>Liabilities &amp; Net Assets</strong></td>
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<tr>
<td>Current Liabilities</td>
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<td>Total Net Assets</td>
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<td>$14,295</td>
<td>$15,851</td>
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<tr>
<td>Total Liabilities &amp; Net Assets</td>
<td>$201,595</td>
<td>$182,839</td>
<td>$177,765</td>
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<td><strong>Statement of Operations</strong></td>
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<tr>
<td>Unrestricted Revenues, Gains, &amp; Other Support</td>
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<tr>
<td>Total Expenses</td>
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<td>Operating Income</td>
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<td>Total Non-Operating Income (Loss)</td>
<td>$1,835</td>
<td>($1,833)</td>
<td>($3,244)</td>
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<td>Excess (Deficit) of Revenues over Expenses</td>
<td>$1,902</td>
<td>($1,486)</td>
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<th>2016</th>
<th>2015</th>
<th>2014</th>
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<tbody>
<tr>
<td><strong>Change in Net Assets</strong></td>
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<tr>
<td>Change in Unrestricted Net Assets</td>
<td>$2,783</td>
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<td>Net Assets, Beginning of Year</td>
<td>$14,295</td>
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<td>Change in Temporary Restricted Net Assets</td>
<td>$3,454</td>
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<td>Net Assets, End of Year</td>
<td>$20,532</td>
<td>$14,295</td>
<td>$15,851</td>
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</table>
Endowments

Since inception, Givens has provided financial support, services, and housing to residents with limited resources. Endowments have been established to provide ongoing support for the Resident Assistance Ministry and community needs.

Resident Assistance Endowments

Mr. & Mrs. Donald Bender
Dr. & Mrs. Embree H. Blackard
Conrad and Fox Families
Divelbiss Family
Mr. & Mrs. W.W. Greene
Mr. & Mrs. Greely Griffin
James H. & Evelyn R. Hanson
Mr. & Mrs. Kenneth LaRowe
McLennan Family
Mueller Family
Howard & Franchelle Myers
John T. Nieburg
Novy Family
Virginia O’Shaughnessy
Ruth Paddock
Joseph Eugene Parks Family
Mr. & Mrs. William W. Richardson
Bill & Joetta Rinehart
Smith-Childs Family
Sales Family
Katherine G. & Ray E. Whatley
Hubert & Joan Williams
Joseph Garland Winkler

Designated Endowments

Givens

Hubert W. & Joan B. Williams Mission & Ministries

Givens Estates

Martha Avett Music
Eleanore M. Brown Life Enrichment
Melvin C. Buller Flagpoles & Meadow
Stephanie M. Coleman Landscape Beautification
The Helgoth Fund
Mr. & Mrs. Richard E. Mershon Bus
John T. Nieburg Internship Assistance
John T. Nieburg Woodworking & Woodcarving
Virginia O’Shaughnessy Bus
Virginia O’Shaughnessy Grand Piano
Virginia O’Shaughnessy Home Care
Partin Family Landscape Beautification
Austin (Russ) & Arlene Rising
Bertha S. Rymer Library

Givens Highland Farms

Karla Longree Music Appreciation

For information on planned giving, please contact Director of Development Mark Bailey at (828) 771-2216 or mbailey@givenscommunities.org.

The Heritage Society

The Heritage Society recognizes those who have invested in Givens through a will, charitable trust, gift annuity, or a residency refund.

Rev.* & Mrs. Harold L. Beaumont
Mr. & Mrs. John M. Bergman
Mr. & Mrs. Wesley Bessell
Miss Eleanore M. Brown*
Rev. Reggie Cooke*
Mr. & Mrs. William F. Depp*
Mr. & Mrs. David Doob
Rev.* & Mrs. Raymond O. Endicott
Drs. Norman J.* & Myrle Gengler
Miss Nell Harden
Mr. & Mrs. Edward R. Hardin
Mrs. Grayce F. Henry
Mr. & Mrs.* Frank Hyde
Ms. Sally Jeanne Kappler
Mr. & Mrs. Theodore A. Kirk
Dr. & Mrs.* Eric Lincke
Mrs. Dorothy D. Marlow*
Miss Helen Anne McMahon
Mr. Ronald J. Mitchell*
Mr. & Mrs.* Francis G. Morris
Mrs. Kathleen R. Pacetti*
Mr.* & Mrs. William Richardson
Mr. & Mrs. Bill Rinehart*
Dr. Martha G. Rowlett
Mr. & Mrs. E. Bretney Smith Jr.
Mr. & Mrs.* Hal F. Starnes
Mr.* & Mrs. Walter Trapp
Mr. & Mrs. Donald A. Watrous
Rev. & Mrs.* Ray E. Whatley
Mr. & Mrs. Hubert Williams
Mr. Richard A. Wood, Jr.*
Mr.* & Mrs. Norman F. Young Sr.

*deceased
Front cover: Dick Bury and fellow Givens Estates residents take advantage of a beautiful fall day to hike on campus.

Back cover, clockwise from left: Residents, staff, and the community dance at Givens Highland Farms’ first annual Jamboree celebration in August 2017. Givens Great Laurels residents celebrate Valentine’s Day with a community social. Givens Gerber Park residents enjoy the solar eclipse at 99 percent totality.