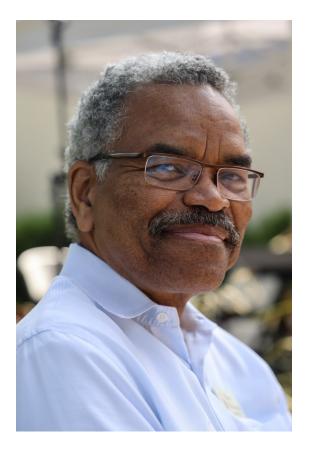


# Embracing the Journey of Resilience and Growth



### FROM RONALD BOLDING, CEO

2022 was the best of times, it was the worst of times, a Charles Dickens kind of year. It was a time of pandemic restrictions but a time of cautious opening of our campus, a winter of social distancing followed by a spring of refreshed relationships, and a period of economic pressure that identified areas to improve financial results. It was a season to grieve those lost and it was a season of thanksgiving for life. It was a time of change and a time of consistent care for each other.

The community could smile as we welcomed the return of family, friends, and neighbors to the campus. The community committed vacant land for the development of permanent supportive housing. March saw the first residents move into The Rauch Memory Care House, where enhanced support is provided by staff, Pilgrim Kin, and the Spiritual Care Team to residents with dementia and Alzheimer's.

The year began with a historic windstorm that downed power lines and 100-year-old trees. The storm crushed roofs and blocked streets in Claremont but did not crush our spirits or our intentional way of living and providing service. With the passion and spirit of our residents, staff, and leadership, the 2022 year ended with a robust enthusiasm for everything that is before us in the coming year.

"Our community is unique, and we cherish our individuality. Residents direct and guide programming, oversee committees, and work in tandem with Administration and the Board of Directors regarding the well-being of our residents and the culture within our community."

- Ron Bolding, CEO of Pilgrim Place

### MISSION STATEMENT:

Fostering a vibrant and inclusive senior community committed to justice, peace and care of the Earth.

# How Fortunate we are to be PILGRIM PLACE!

FROM ELEANOR LOELIGER, MODERATOR

While our community remained challenged by the continued COVID restrictions and precautions in place for retirement communities such as ours, Pilgrim Place forged ahead. In the spirit of our ethos of justice, peace and care of the Earth, we did not let such obstacles slow us down. Instead, we continued to approach our senior living through our values and our unique culture of communal involvement. The year led us down new, uncharted trails, and we explored and mapped out new ways of doing.

Through resident-led activities and resident governance, we proceeded to push and challenge ourselves. Some of us were impatient and ready to get out into the world, but others were still hesitant. We worked to sort out our issues and concerns as a community should. Compromise — lots of compromise!

As the world around us whipped off their masks and resumed indoor activities and loosened precautions, we remained faithful to our most vulnerable residents by continuing to be committed to their safety and well-being. This meant continued zooming, adjusted gatherings, modified dining, and reduced services. Most importantly, it meant remaining physically separated from many of our fellow residents and not being able to gather in our traditional ways. And that was the hardest part of all.

Still, with an abundance of creativity and a sense of humor, we found our way. We held our Napier Celebration via Zoom, we adapted our Festival to remain internal, we increased our outreach via social media, we raised impressive sums of dollars for Resident Health Support and other programs, and we began to use our communal space in new and different ways.

We developed new programs and took time to reflect upon those that were on hiatus.

And while other retirement communities continued to see a lull in admissions, we welcomed 21 new residents, who brought with them collected years of experience in ministry, academics, and advocacy, adding their passion and commitment to our community.

It's been said by many of our residents, "We live simply so that we may give generously of our time, talents, and means for the greater good of our planet and those who live on it." How very true these words ring for our community.

It was a great honor to serve as the Moderator for our community and I am very proud of our perseverance and fortitude demonstrated this year.

As the pandemic began to recede, Pilgrim Place Independent Living Residents began to enjoy lunch each day in Abernethy Hall. Assisted Living residents in Pitzer Lodge and Friendship Court started to see similar welcome changes. One of the best was eating with friends in the Pitzer Dining Hall for two or three meals daily — no more meals in their rooms!



# Reflection on a Year of Resilience

Rules requiring masks and other precautions remained for those in Assisted Living, especially when those few who traveled on public transportation returned with positive COVID-19 rapid tests. Very few cases developed, except for a few who had traveled. An additional booster in October was welcomed by all as continued protection for residents and staff.

Many of us are incredibly grateful for the care and concern of the COVID Response Team, which comprises some from Administration, the Board of Directors, residents, and staff. Weekly reports would inform us when standards, trends, and rules were updated.

A highlight of 2022, in March, was the opening of The Rauch Memory Care Houses. New staff and residents began to occupy the first house. There are stimulating activities and regular visits from our Spiritual Care Team and friends, and there is a garden

area for sitting and walking. It has been a successful transition for residents, and community persons needing this higher level of care.

The Plants and Produce Committee's fruit and vegetable sorting shed was rebuilt at last and became the Alice Cook Pavilion, dedicated to the memory of a beloved member of the community. She also inspired a substantial gift that created the Alice Cook Diversity Initiative formed to promote more significant conversation and outreach in the larger community, with the goal of bringing greater diversity to our campus.

We had a marvelous Earth Week in April. There were classes on composting, and bird watching, and a tree-planting ceremony. The Plymouth Garden was dedicated and renamed "Dean's Garden" in honor of resident Dean Freudenberger, who worked tirelessly on teaching residents composting and gardening.

The garden honors Dean's labors of more than 20 years here.

New equipment and updates in Abernethy and Decker Halls had everyone busy. A new walk-in freezer and coolers replaced the kitchen coolers that were over 40 years old. A new fire alarm system installation replaced a 30-year-old outdated system. Residents managed well during the installation time, as it provided increased safety for residents and staff.

Finally, during several months throughout the year, we saw new landscaping as 10,000 square feet of turf was removed throughout the campus. We admired new drought-tolerant plants in many Independent Living residents' yards and in the East Pitzer Garden, along with new lighting and concrete structure around the massive oak tree in the center — a beautiful place to walk, relax, and admire.

At Pendleton, a new garden installation honoring the Tongva people was created by the talents and efforts of many staff and residents. With this changing landscaping throughout the campus, several thousand gallons of water are captured for the aquifers below.

The path forward brought in 21 new residents in 2022. Pilgrim Place's values, location, beautiful campus, and supportive administration and staff continue to attract residents to our intentional community.



# We Move Forward with Purpose and A New Perspective

2022 FROM DAWNYELL VARELA, THE PERSPECTIVE OF STAFF

In the heart of Pilgrim Place, I find myself immersed in a vibrant community built on compassion and support. Here, a tapestry of emerging pathways unfolds, weaving the lives of its residents together. Within the embrace of Independent Living, Assisted Living, skilled nursing, and the recently added the Rauch Memory Care Houses, I feel a deep sense of comfort, knowing that I am truly cared for.

Pilgrim Place management saw something in me that I did not see in myself. Their unwavering encouragement ignited a new chapter in my life. They believed in me and helped me redefine myself, fostering resilience and purpose. That is what Pilgrim Place has given me.

Even in my seasoned years, the notion that I could forge a career seemed unfathomable. Yet, with its nurturing embrace, the Pilgrim Place community allowed me to redefine myself. As days turned into weeks and weeks into months, I blossomed, developing petals of resilience and drive. The training received challenged me, but I took every single challenge as an opportunity to grow and learn to be the best version of myself.

Soon after I resumed the role of Assisted
Living Director, I was asked to help with
the Memory Care Director position. A new
confidence emerged, and the need to help
that sparked my genuine love for leadership
was defined. Some of the training that
helped immensely in that development
was the Diversity Competencies to support
the organization's shift to a more diverse,
equitable, and inclusive culture. The tools
I received from the training are designed
to create pathways for employees to learn

and grow in the critical area of authenticity, integrating and leveraging diverse perspectives that promote innovation and collaboration.

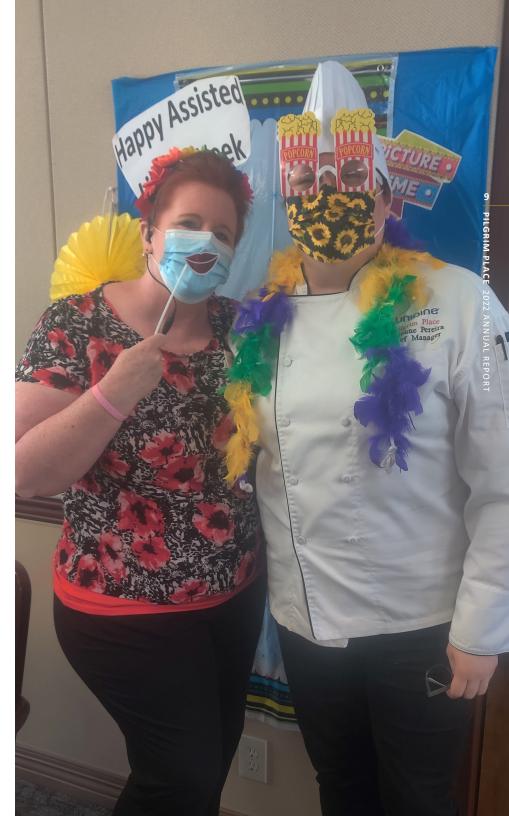
Pilgrim Place is more than just a place of personal growth; it is a testament to the solid spirit of its residents. Here, one's purpose doesn't decline with age, it flourishes. The residents, with hearts overflowing with wisdom and compassion, yearn to make a difference. They extend their hands to each other and the younger generation, bridging the gap between ages and imparting the essence of a life lived fully. They have inspired me to continue to search for my calling in leadership in ways that remind me every day of the kind of leader I strive to be. Their presence serves as a living testament and has helped me believe in myself and understand that we are never finished learning.

They are vibrant reminder that they are still *here*, pulsating with life and energy they defy the limitations imposed by time and illness, showcasing their invincible spirit.

Pilgrim Place, for me, is a haven where life finds its purpose, hearts find support, and the mark of each resident echoes throughout the generations. It reminds us that emerging pathways await those who embrace them.







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Catherine Edge Ambler and Paul Ambler •

Janice and Richard Anderson

Arlene Andrew

Georgeann Andrus

Jennifer Armstrong ₩

Ian Atwood

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Jessica First

First City Credit Union

First Congregational United Church of

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Paula Hui 
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Sarah Johnson

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Zayn Kassam **¥** Margaret Kelly

Josephine and Thompson Kimura

C K and Jeannine Kiser

Paul Lamb •

Dan and Karen Laponis ■ Allen and Joanne Laviolette

Jenna Lee

Marjorie and Robert Leonhardt

Robert Lewis

Cheryl and Russ Loar



We are confident that Pilgrim Place will continue to thrive, uniting our community and leaving a lasting impact on all who join us in this journey.

- Ron Bolding, CEO of Pilgrim Place



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# Friends (continued)

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**Brad and Susan Starr** 

Thomas Stiers

Darlene Zumo

## Residents 2022

Anonymous

Alice and Rizek Abusharr David Adams and Jani Monk

Doug Ades and Ela Dec

Jean Aigner Ruth Allin

Barbara and John Anderson Rose Ash and Glenn Goodwin

Mary Atwood Betsy Bacon Sandra Baldonado Catherine Banbury Wendy Bayer Bill and Mary Beck Anna and Jerry Bedford

Virginia Bergfalk Earl and Nijiko Bergh Mary Rose Bertucci

Pat Beswick Chris Blackburn

Joan Blocher and Jim Dunkly Gus and Martha Boesch

Gene Boutilier and Barbara Troxell

Philip and Sharon Bowles
Jim and Lenore Brashler

Donald Braue and Donna Orange

Bonnie and Rex Britt

Shirlee Bromley and Ellen Webster Raymond and Suzanne Brown

Marilyn Brunger

Frederic and Mary Ann Brussat

Margaret Burdge

Chris and Mary Caenepeel

Ramona Cass

Donald and Judy Chatfield

Cynthia Chertos and William Dodge

Nancy Clark
Pat and Tom Clark

**Betty and William Clements** 

Barbara Coates

Kimball and Pamela Coburn

Nancy Cooney

Ed Copeland and Margaret Mathies Maura Corley and Renny Golden

Sandra Costell Jim Craig

Susan Craig and Bear Ride
Janet Cromwell and Gary Oba
Marlis Daerr and Eva Von Frangue

Ken Dale Donna Danielson Stephen Davis John Denham Jean Denton

Joanna Dewey and Fairbairn Powers

Terry Dodge Mary Douglas Jane Douglass Ruth Duck Mary Duggan

Helen and James Dwyer Janet Edgar and Bob Mitchell

Janet and Ron Evans Scott Evenbeck Judith Favor Jim and Judy Fiske Jai and John Forney Joan Forsberg Carolyn Francis Betty and Ken Frank

Dean and Elsie Freudenberger

Evan and Nan Freund Lew and Mary Fry Laura Fukada Sue Gallagher Mary Gindhart Cathy Gish-Persi

Dell Gossett and Kay Kukowski

Connie Green Kathleen Greider Ruth and Terry Hager

Jeanne Halverson and Steve Jackson

Louilyn Hargett

Butch and Rosemary Henderson

Lois and Ronald Hines Joy and Phil Hofer Heidi and Joe Hough Maggie Hover John Howell

Bob Hurd and Pia Moriarty

Pat Hynds David Jamieson Bill Johnson Mary Johnson Bruce Jones

Lynne Juarez and Charlene Tschirhart

Lyn Juckniess

Fern Jo Kaukonen and Kae Lewis

Bob and Nelda Kendall

Diane Kenney Connie Kimos Annie Wu King Carol Kingshill Gwen Kirk

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Paul Kittlaus and Janet Vandevender

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Jean Minus
Flizabeth A Moore

Beryl and Stanley Moore

Diane Moore Elizabeth Moore

Bob and Elizabeth Moore Bill and Grace Moremen

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**Ruth Sandberg** 

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Sally Simmel

Sara and Stephen Simon Anelise and Bob Smith Patricia and Steven Smith

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Julie Steinbach
Anne Steinle
Alison Stendahl
Kenneth Stephens
Ann Marie Sullivan
Keith and Linda Tennis

Sally Timmel
Dick Tipping
June Totten
Dwight Vogel
Pat Wall

Douglas Wallace Shirley Washington Teresa Wilson

Antoinette and Hugh Wire

Gale Yee

Edward and Mary Yonan

# Financial Results

2022 was a year of adversity, yet during the fiscal year ended December 31, 2022, financial results were strong, and occupancy increased slightly in Residential and Assisted Living / Memory Care but decreased in Skilled Nursing. Average occupancy in Residential Living and Assisted Living / Memory Care was 92%, while the skilled nursing facility was 70%.

Overall, unrestricted net assets ended the year down at \$2.47M. Like many organizations, stock market instability contributed \$1.1M of the loss in our General Endowment. Operating income was \$843k, other income used \$315k, and net assets (net income) was \$5.45M, absorbing losses of \$2.7M in the Davis Health Endowment. Net cash from operations was \$34k. Revenue was generated primarily from rents and fees, \$17M versus \$16.5M in 2021, and PRF monies contributed \$379k.

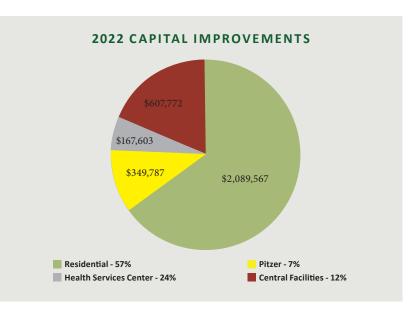
Gifts, donations, and endowment income continue to play an essential role in Pilgrim Place's overall financial health, which allows us to utilize the generosity of residents, friends, churches, and other organizations toward providing the highest quality care and services to our residents.

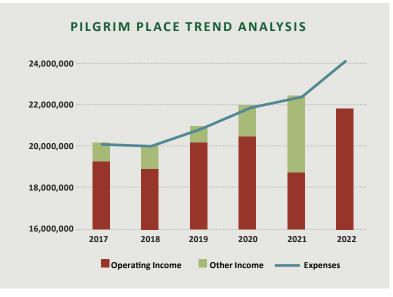
The value of our Gift Annuity Portfolio at

the end of 2022 was approximately \$479k. Pilgrim Place recognizes contributions from supporters through estate planning and direct gifts that benefit the endowment through various campaigns overseen by its Advancement Office. Many have included Pilgrim Place in their wills.

The Pilgrim Place Endowment recognized losses of 20.1% or \$3.8M in 2022. Capital calls for our Alternative Investments total \$286k. Capital calls since inception (2020) total \$617k. As a result of our contributions, the Pitzer Promissory Note has been paid in full, and we have begun to pay down the HSC Promissory Note. The balance owed is \$2.7M, down from \$3.445M, when we began repayments.

The support provided to the Residents Health and Support Program (RHSP) was \$982k. As of December 31, 2022, the total market value of the endowment was \$15.1M.





### **CAPITAL IMPROVEMENTS**

TOTAL: \$3.2M

During 2022, Pilgrim Place continued its commitment to maintain and upgrade houses, facilities, and grounds. An investment of \$3.2M went to capital improvements on campus, such as house preps and renovations, HSC and Assisted Living remodeling, and repair of other central facilities.

The financial summary is based on audited records. The independent audit report by Clifton Larson Allen, LLP, Certified Public Accountants, will be available for examination upon request.

### **OPERATIONS 2022**

Rents & Fees	21,910,404
Expenses	15,287,622
G&A	6,097,320
Depreciation	3,000,616
Operating Surplus (Deficit)	(2,475,155)
OTHER INCOME	
Endowment/Investments	(1,045,169)
Donor Support	475,693
Net Revenue over Expense	(3,044,631)
OTHER CHANGES	
Other Gifts	572,010
Net Increase/(Decrease)	
Unrestricted Assets	(2,472,621)



# Legacy League

We are immensely grateful to the esteemed members of the Legacy League, whose philanthropic foresight and generosity have led them to designate Pilgrim Place as a beneficiary in their will or through a planned gift. Their thoughtful actions have paved the way for establishing the Pilgrim Place Endowment—a testament to their unwavering commitment to our organization and its mission.

We extend our sincerest gratitude to the members of the Legacy

Alice and Rizek Abusharr
David Asai
Betsy Bacon
Wendy Bayer
Bill and Mary Beck
Virginia Bergfalk
Earl and Nijiko Bergh
Peter Bergsman and Diane Ruch
Chris Blackburn
Gus and Martha Boesch
Gene Boutilier and Barbara Troxell
Shirlee Bromley and Ellen Webster
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2020 Resident Moderator

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Lisa Grater - Advancement Coordinator

Eleanor Loeliger - 2022 Moderator

Dawnyell Varela, Director of Assisted Living & Memory Care

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Yadi Malik, Communications & Digital Content Manager

A BIG thank you to all resident and staff photographers for sharing their images!



