

Celebrating 60 years



Willamette View
2015 Annual Report



The dream became a reality

Over 60 years ago there was the dream of a place where people would experience a new way to age. . . together as actively engaged and purposeful individuals, living independently in a place designed just for their needs. In the early 1950s that was a unique idea, and many did not believe it could happen. But it did.

Groundbreaking for Willamette View Manor, as it was then known, was held on August 23, 1953.



Nearly 300 pioneering individuals moved in on January 3, 1955; creating a community in its truest sense... laying the foundation for future generations to come.



Residents Barbara Brandt, Donna Krasnow, Coralie Van Horn and Elise Meyers celebrate at the 60th Anniversary SummerBash on August 22, 2015.



Then and now.



PROFILE-1955

| | | |
|-----------------|------|---------------------|
| ACREAGE | 22.5 | ACCOMMODATIONS |
| RESIDENT CENSUS | | Apartments: 240 |
| 3/30/1955: | 279* | Infirmiry Beds: 14 |
| BUILDINGS | | EMPLOYMENT |
| Manor | | Salaries: \$84,876* |

**Per available documents*



PROFILE-2015

| | | |
|--------------------------|-----|----------------------------|
| ACREAGE | 27 | ACCOMMODATIONS |
| RESIDENT CENSUS | | Apartments: 260 |
| 12/31/2015: | 462 | Houses: 26 |
| BUILDINGS | | Supported Living: 53 |
| Manor | | Assisted Living: 45 |
| Court | | Memory Care: 15 |
| Plaza | | Skilled Care: 6 |
| The Homes on River Ridge | | EMPLOYMENT |
| Terrace / Patio Homes | | Full-time: 214 |
| Health Center | | Part-time: 105 |
| River Road Houses | | Annual Payroll |
| Silver Springs Houses | | and Benefits: \$12,698,929 |

Willamette View, established January 3, 1955 is a state-registered 501(c)(3) not-for-profit.

Celebrating 60 years

Six decades after Willamette View opened its doors we thought it was time to throw a party... or three. The occasion was too momentous for just one.

'Milkshake, Rattle & Roll' Kick-off Party January 9th



Pancake Breakfast for Employees & Families July 18th



60TH ANNIVERSARY Summer Bash



August 22nd

The big event included a roasted pig, BBQ ribs, cocktails, a photo booth, games and music by Big Night Out – all on the back lawn. Friends, residents, neighbors, community partners, employees and board members—past and present were all there to celebrate. It was a blast... a night to remember!



Celebrating the vision



Craig Van Valkenburg, CEO

A Message from the CEO

Imagine what it must have been like in the early 1950s, creating the vision for a community for seniors, an environment that did not exist in the Portland area at the time. Inviting people to share the vision, to see the possibilities, to create such a community together that only existed on paper. And to pick your apartment from a blue print, to sell your home with only faith and the belief that the community could be built... and you would enjoy it?

As Margaret Meade said "Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has."

Our founders were a small group of thoughtful, committed and visionary citizens who found others to support the vision and turn it into reality. That reality transformed Willamette View into what it is today: vibrant, vital and rich with community culture; continually improving and stretching itself to be innovative, growing to meet the expectations of today's seniors while holding to our core purpose.

The idea of a communal senior living community "out here on the west coast" was so unique and unheard of that the Saturday Evening Post, itself an icon and the most widely circulated magazine in the United States at the time, sent its Contributing Business Editor from Pennsylvania to investigate -- something had to be amiss with this concept of older people living together. Well, there was nothing wrong, in fact, the author of the article believed so much in what he saw and experienced that when he retired from the Post he and his wife packed up and moved west to live at Willamette View! That is a testimony to the vision and passion of our founders.

Sixty years later we're celebrating the accomplishments of the past and readying for our future. We renewed our purpose: expanding our mission "To Inspire the Art of Living Well" and our vision "To Transform the Experience of Aging" with robust wellness and fitness programs, new and updated residential options, an enhanced food and beverage program, and home care services. But we still hold true to our core culture while expanding the possibilities for the next sixty years.

Our goal is to leave Willamette View a better place than when we arrived, like our founders did from the beginning.

We inspire. We aspire.

Directions taken and choices made are driven by our mission and our vision. That was true in 1955 and is the same today... and will be in the future.

Our mission

To Inspire the Art of Living Well

Our vision

To Transform the Experience of Aging

Our commitments

We strive for excellence through creativity and continuous improvement.

We support each person through an engaged wellness lifestyle.

We foster a culture of community.

We build trust by keeping our commitments.

Accreditation.

A commitment to continuous quality improvement.



Senior communities are not required to be accredited. But Willamette View is. CARF-CCAC (the Commission on Accreditation of Rehabilitation Facilities-Continuing Care Accreditation Commission) is the leading independent accrediting body, recognized throughout North America and Western Europe. It sets exceedingly high standards for providers of healthcare and human services. It's similar to accreditation for a hospital or college... or a five-star rating for a hotel.

The peer review process is rigorous and not every community is awarded accreditation. We were. And have been since 1995.

Willamette View is a State of Oregon-registered continuing care retirement community and a 501(c)(3).

Purpose & Commitment



Leading the way (l-r): Rev. Edward Terry and Clyde Mummery

On September 1, 1953, Oregon Methodist Homes, Inc. was created, becoming the sponsor and developer of a "new and modern retirement residence." An office was set up in Centenary-Wilbur Methodist Church in Portland. Rev. Edward Terry was named President of the Board of Trustees for the new corporation, and Clyde Mummery appointed the first Executive Director of Willamette View Manor.



Carrying the legacy forward

2015 Willamette View Board of Directors

Michael Fraser, Chair; Healthcare Management, Retired

Greg Fitzgerald, Vice Chair; Executive Director, Clackamas Community College Foundation

Mike Middal, Secretary/Treasurer; Commercial Banking, Retired

John Hartsock, Past Chair; J.N. Hartsock Project Management

Sonja Connor; Assoc. Professor, Endocrinology, Diabetes & Clinical Nutrition, Oregon Health & Science University

Paul Barber; Human Resources Consultant / Barber Group, LLC, Retired

Carlotta Collette; Councilor, Metro Council, District 2

Ken Gustafson; CPA, Gustafson, Berg & Co., LLC

Craig Iverson; CPA and Tax Attorney, Retired

Stewardship of Willamette View



Administration

Craig Van Valkenburg, CEO

Brian Thompson, CFO

Kim Buchholz, Administrator, Residential & Campus Services

Mjere Simantel, Administrator, Healthcare Services

Leadership

Mark Hollis, Director of Sales

Julie Dimick, Director of Property Development and Asset Management

Chris Massey, Director of Plant Operations and Environmental Services

Paige Vaughn, Director of Food and Beverage

Joyce Allmon, Director of Corporate Communications and Community Relations

Jenny Sherman, Director of Human Resources

Mark Meyer, Director of Finance

Carolyn Dickman, Manager of Development and Donor Relations

Marybeth Jones, Assistant Administrator Healthcare Services, Home Care Administrator

Elizabeth Moore, Administrator, Skilled Nursing Facility

Willamette View Association Residents Council

The Willamette View Association Resident Council, which acts as the liaison between residents and administration, plays a vital role in decision making. The Council is responsible for resident life and more than 150 activity programs. It is made up of 13 elected and four appointed positions, all are six-month terms. Elections are held twice a year with an annual meeting in June and a semi-annual meeting in December. The Council Chair, Vice Chair, and immediate Past Chair are voting members of the Willamette View, Inc. Board of Directors.

2015 Chairs and Vice Chairs

January – June: Solon Stone, Chair Jean Vick, Vice Chair

July – December: Jean Vick, Chair Bob Thomas, Vice Chair

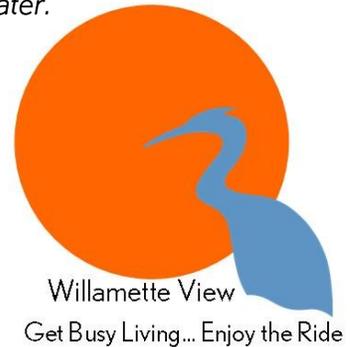
A community connected

... our engagement with others



Catch the Orange Line Welcomed MAX to our neighborhood!

Opening of the new TriMet/MAX Orange Line on September 12, 2015. Willamette View was there, celebrating a new way to travel in Clackamas and Multnomah counties: engaging children and adults with creative arts activities; and handing out free oranges and water.



American Heart Association Greater Portland Heart & Stroke Walk

Willamette View's employees, residents and family members enthusiastically walked to raise money to fight heart disease and strokes.



A community connected

... our engagement with others

Support for the Local Community and Other Non-Profits



Host for the North Clackamas Chamber's annual Christmas Giving Breakfast



Silver Level Chair Circle; sponsor of the Emergency Services/Public Safety Forum

At Christmas employees and residents collected and donated new toys and clothing to Annie Ross House, a local non-profit providing emergency shelter to families in Clackamas County.

Donations to Annie Ross House



A community connected

... being there for our neighbors



Electric Vehicle Charging Station for Community Use



In April, two electric vehicle charging stations were installed near the campus main entrance driveway – available to the public to use. Just one example of Willamette View's commitment to green living.

Veterans and the City of Milwaukie Asked for Help... We Responded

Willamette View donated buses and drivers to shuttle people to and from the travelling Vietnam Memorial Wall during the 50th anniversary commemorative tour of the country.

It visited Milwaukie, Oregon on July 23rd through 26th, 2015.



Arts for Humanity Project



Residents gathered on Monday afternoons in the artworks studio throughout the fall making quilts, baby blankets, hats and scarves for IRCO, The Immigrant and Refugee Community Organization.

Building relationships

We hosted community groups, schools and civic organizations events:

- OHSU (Oregon Health and Science University)
- North Clackamas Emergency Services Foundation
- Portland Community College / Senior Studies Institute
- Clackamas Community College Board of Directors
- North Clackamas Chamber of Commerce
- North Clackamas Education Foundation
- Milwaukie Center Advisory Board
- Portland-Milwaukie Light Rail / TriMet
- LeadingAge Oregon
- Milwaukie Rotary



Community health and community-building activities:

- Good Roots Food Bank collection site
- Community use of campus pool by Providence Milwaukie Hospital aquatic therapy and rehab patient programs
- Clackamas Community College—host for five onsite classes
- Life lab for OHSU research studies on mobility, aging and technology

- Participation with FamilyGram in research for an iPad app that connects seniors with family and friends



Health Professional Education

- Provided internship opportunities in coordination with local schools: Art Therapy and onsite clinical training for nursing students
- Created “Dialogue with Doctors” curriculum program in partnership with OHSU Medical School, Family Practice medical residents

Taking part in community life

American Legion Post 180, City of Milwaukie—Vietnam Memorial Wall shuttle transportation



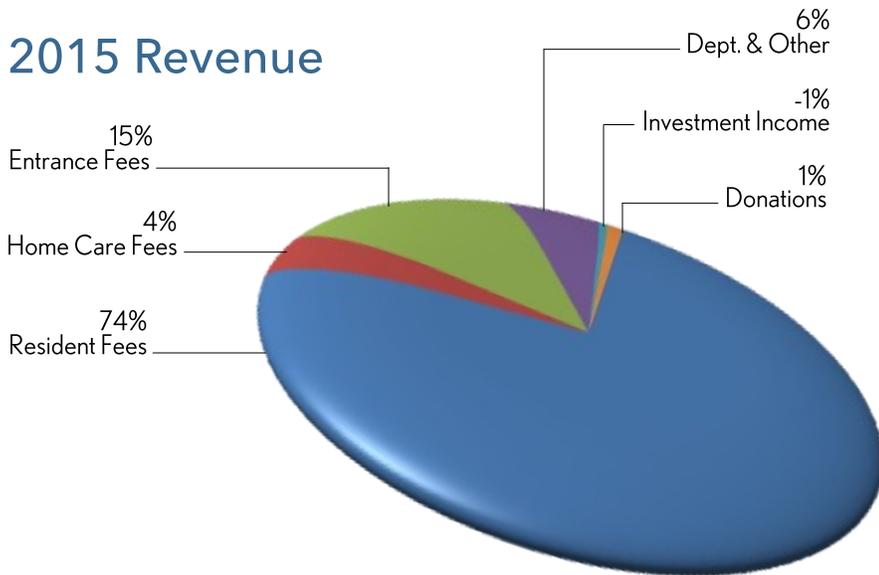
We supported others with in-kind donations and financial help:



- Sponsor of First Friday Milwaukie & Historic Milwaukie
- Scholarships for Mt. Hood Search and Rescue training
- Funded Dance for Parkinson’s Oregon program at WV
- Sponsor Friends of the Milwaukie Center
- Annie Ross House donation collection
- Free facility use for not-for-profits
- Habitat for Humanity / Store
- Rebuilding Center
- Vietnam Veterans of America

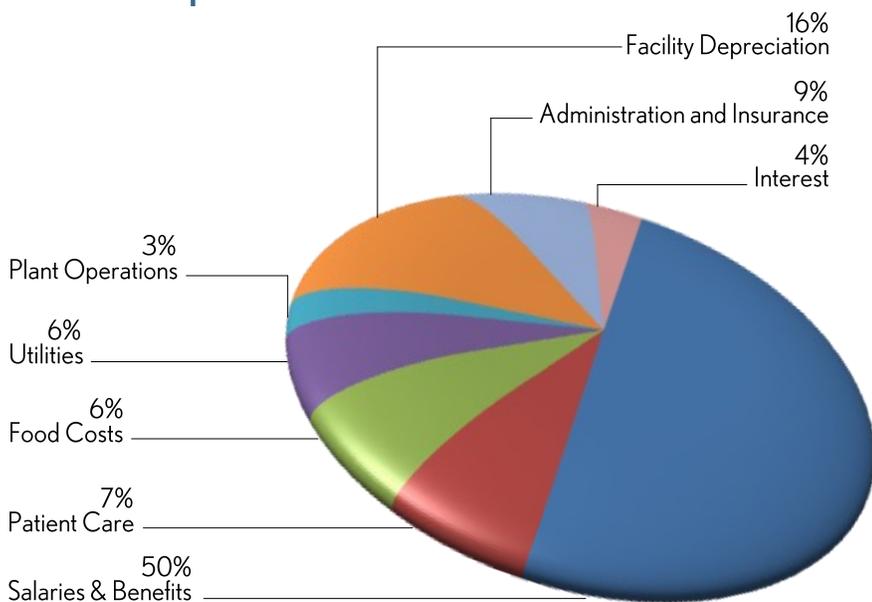
Operating results

2015 Revenue



Total Revenue: \$25,494,185

2015 Expenses



Total Expenses: \$24,762,438

1955 Facts About Willamette View Manor



The Founders

| | |
|---------------------|-----|
| Number of women: | 352 |
| Number of men: | 75 |
| Average age: | 69 |
| Oldest Founder: | 95 |
| Youngest Founder: | 48 |
| Number of states | |
| Founders came from: | 15 |



Manor Building

| | |
|----------------------|---------------|
| Cost of the Manor | \$2.5 Million |
| Number of apartments | 240 |
| Number of floors | 8 |
| Yards of concrete | 8,000 |
| Number of windows | 533 |
| Number of doors | 2,000 |
| Auditorium capacity | 460 |
| Floor space equals | 5 acres |

Staff/Services/Board of Trustees

| | |
|-----------------------|-------|
| Number of staff | 45 |
| Number of daily meals | 1,000 |
| Board members | 30 |



Statement of financial position

Year End -- December 31 2015 2014

Assets

| | | |
|------------------------------|---------------------|---------------------|
| Cash and Investments | \$12,687,158 | \$13,642,417 |
| Other Current Assets | \$2,690,372 | \$2,893,199 |
| Property and Equipment (Net) | \$51,208,151 | \$49,370,360 |
| Other Assets | \$410,578 | \$438,079 |
| Total Assets | \$66,996,259 | \$66,344,055 |

Liabilities and Net Assets

| | | |
|---|---------------------|---------------------|
| Current Liabilities | \$5,290,007 | \$5,991,275 |
| Long-term Debt | \$26,110,000 | \$27,640,000 |
| Deferred Revenues/Other Liabilities | \$31,078,860 | \$28,942,192 |
| Net Assets | \$4,517,392 | \$3,770,588 |
| Total Liabilities and Net Assets | \$66,996,259 | \$66,344,055 |

Giving forward. . .

We are especially thankful to the following donors for their support of Willamette View Community Funds in 2015.

Individuals & Families

Joyce Allmon
Anonymous
Tammy Archuleta
Cecile Baril
Ed & Gloria Biow
Dale & Barbara Brandt
Jackie Buisman
Martha Butler
James & Carol Cameron
Sonja Connor
Bonnie Daly
Davis Family Trust
della Santina Family Trust
Robert & Grace Dichtel
Carolyn Dickman
Julie Dimick
Ed Easton
Jim & Vickie Edwards
Hal & Donna Estry
Carole Fibish
June Fraley
Joana Frick
Mary Frieder
Thomas & Ruth Gallagher
Gary & Karen Genzer
Thomas & Molly Gillcrist
Linda Girard
Greg Gregory
George Grossman
Dale & Carla Harris
Hugh & Terry Haven
Grace Hawes

Thomas Henderson
Henry Failing Fund
Tom & Sandy Hill
Patrick & Kathleen Hodai
Mark Hollis
Vern Huffer
Craig Iverson
James B. Stephens Endowment Trust
Laura Jean Jory
John Kapteyn
Donna Krasnow
Linda Lamb
Robert & Alma Lamkin
Rose Lauser
Alicia L. Lee
Harvey & Ellen Leff

Michael Litt
Jeanne Magmer
Carl & Linda Marschall
Cal & Velma McConnell
Dan & Laurie Merrell
Louis & Carol Meyer
Jack Mills
Philip Mirkes
David Moore & Jacqueline Barber
Elizabeth Moore
Robert Moore & Sherry O'Daniel
Robert & Marian Morris
John & Marian Murray
Ron Nordeen
Beulah Parisi
Lloyd Peterson



Kristin Perry, recipient of the first Alan Fibish Employee Scholarship award, with her family.

We strive to publish accurate recognition. Apologize for any errors or omissions to this list.

Kristin Perry and Carole Fibish



Supporting the future

Individuals & Families, cont'd

Eva Polz
Nancy Pratt
Rosemary Quast
Earl Riddle
Ronald & Ilga Ross
Stanley & Carol Ruckman
Robert & Ruth Ryf
Helen Saulson
James & Julianne Sawyer
Betsy Seidel
David & Ann Shearer
Shishido Family
Joe & Jean Slavitt
Frank & Penny Starr
Gerald Stearns
Bill & Patsy Steimer
Pearl Steinberg
Solon & Anita Stone
Robert & Sandra Thomas
Brian Thompson
Margaret Turner
Craig Van Valkenburg
Madison & Jean Vick
Bruce Victor
Mary Waldo
Susan Watson
Tom & Beverly Whitehead
Terry & Kathryn Wiesner
Melinda Williams
Jean Gressley & Mae Wygant
Ernie ZumBrunnen

Businesses & Organizations

Ferguson Wellman Capital Management
SupplySource
Willamette View Foundation

Willamette View Residents Association

Programs & Activities

Community Stores: Carousel, Mart and Pantry
Documentary Movie Committee
Knitwits
Movie Committee
MusicWorks

Willamette View Activities

Cage Sale
Helping Hands Auction



There are four priority funds within Willamette View Community Funds, designed to allow charitable giving to match your passions. The ability to select where you want your donation to go is at the heart of Willamette View's planned giving program.

Capital Fund — gifts to the Capital Fund allows for continued vitalizing the Willamette View community.

Benevolent Fund — provides financial security to individual residents if they live beyond their resources.

Alan Fibish Employee Scholarship Endowment — supports employees in their education endeavors.

Heron Fund — includes unrestricted donations for areas of greatest need.

We owe much . . .



To those who made the dream possible

Thank you.



Willamette View
13021 SE River Road
Portland, Oregon 97222
503.654.6581
800.446.0670
www.WillametteView.org
info@WillametteView.org

