



evergreen

The Magazine of Sunnyside Communities

Vol. 1 2016



Special
TALENTS.

ENRICHED LIVES.



John J. "Jack" Broaddus
President & CEO

President & CEO's Message

Jack Welch, former chairman and CEO of General Electric, said, "No company, small or large, can win over the long run without energized employees who believe in the mission and understand how to achieve it." Any organization, regardless of size, can have a culture and a mission, but the key is to unite them so that the values of the organization shine through its employees.

At Sunnyside Communities, our organizational culture is purposefully aligned with our mission. We refer to our organizational culture as the "Spirit of Sunnyside," which is an attitude of service to each other for both residents and staff. It is a key component to how we fulfill the mission and has been embraced at all levels of the organization.

Created in 2006 as a signature program of Sunnyside Communities, SHINE is one of the many ways we ensure a strong corporate culture. It embodies an attitude of wanting to serve each other and helps guide our staff in their daily interactions with each other, residents, and in the community. You might say that SHINE is a map for how to exercise the "Spirit of Sunnyside" every day and in every situation – both inside and outside of work.

In this issue of *Evergreen* magazine, there is an article about the SHINE program. It defines the values of the program from a variety of perspectives and demonstrates the exceptional staff we have at Sunnyside Communities as well as their commitment to delivering exceptional service all the time. Most importantly, when you read the article, you will begin to see the translation – Sunnyside Communities is a good place to live and work.

John J. "Jack" Broaddus
President & CEO

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McClung Companies
Waynesboro, VA

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Evergreen is published by
Sunnyside Communities, Corporate Office,
600 University Boulevard, Suite L, Harrisonburg, VA 22801,
for residents, staff, trustees, donors, and friends of
Sunnyside, King's Grant, and Summit Square.

www.sunnysidecommunities.com
540-568-8600

Printed using Toyo HyPlus ink, a petroleum-solvent-free ink made from a vegetable oil base including soy and linseed oils.

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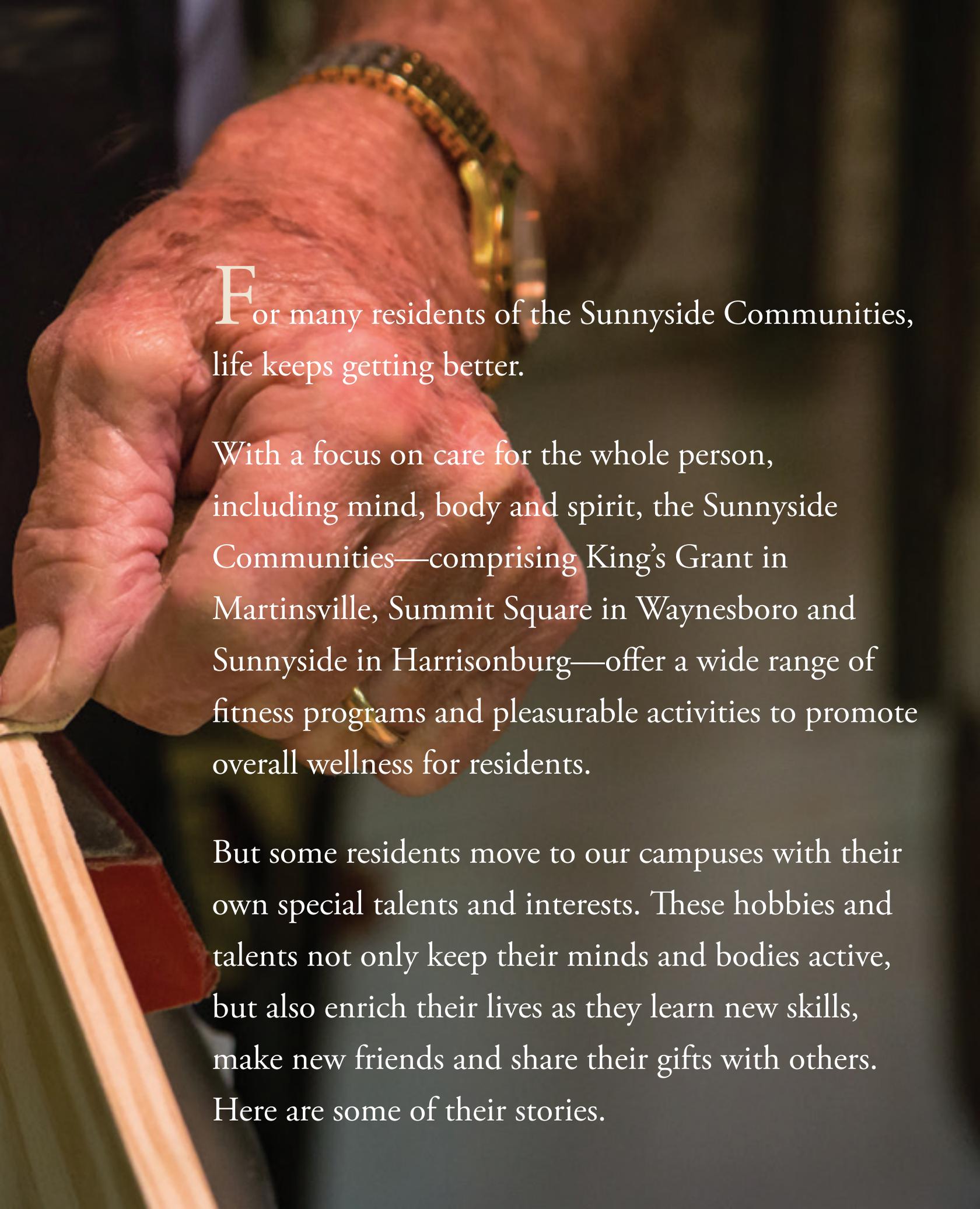




Simple. gifts

*Artistry and Special Talents Keep
Residents Busy at Sunnyside,
Summit Square and King's Grant*

BY KAREN DOSS BOWMAN



For many residents of the Sunnyside Communities, life keeps getting better.

With a focus on care for the whole person, including mind, body and spirit, the Sunnyside Communities—comprising King’s Grant in Martinsville, Summit Square in Waynesboro and Sunnyside in Harrisonburg—offer a wide range of fitness programs and pleasurable activities to promote overall wellness for residents.

But some residents move to our campuses with their own special talents and interests. These hobbies and talents not only keep their minds and bodies active, but also enrich their lives as they learn new skills, make new friends and share their gifts with others. Here are some of their stories.



THE SECRET LIFE OF

Bees

It's not uncommon for residents to bring beloved pets when they move to Sunnyside. But as Andy Sale and his wife Frances prepared for their move to the Harrisonburg campus two years ago, their request was a little unusual: Sale wanted to bring along his honeybees.

"The bees are like our pets, but the interesting thing about them is they take care of themselves," says Sale, 73, who started beekeeping about seven years ago while living in Lynchburg. "Keeping bees doesn't mean that they are dependent on me. They aren't like cats or dogs that you would have to feed every day—they make their own food. Beekeeping is the art of enhancing and utilizing the natural behavior of bees to produce something—the honey—that is beneficial to me."

The buzzy residents are the first of their kind at Sunnyside—at least formally. With three hives containing anywhere from 30,000 to 40,000 honeybees each, Sale has covenanted with Sunnyside to follow beekeeping best practices to keep the bees from disturbing their neighbors. These practices include keeping the hives in a spot with low visibility, fencing in the hives and posting a "Warning" sign, and properly managing the swarms.

A Virginia Master Naturalist, Sale enjoys educating groups of all ages about bees and has done numerous programs in the local area, including a project with some local Girl Scouts. Sale shares fascinating facts about honeybees, which were brought to America by the early European settlers. Honeybees, which are not aggressive insects, pollinate about 25 percent of the foods that humans eat. With a life expectancy of about three weeks, honeybees are the only insects that produce food for humans.

Sale harvests honey twice a year—in the spring and in the fall. Each bee makes about one-half teaspoon of honey in its lifetime, and this past year, Sale harvested eight gallons, which he sells and gives to family and friends.

"Honeybees are fascinating," says Sale, a retired Presbyterian minister. "I'm fascinated with their social structure and how they communicate, their work patterns and how they fight off predators. Beekeeping is very intriguing and very stimulating—and it's a wonderful conversation piece. I'm always learning something." ■

DREAM

Weaver

Pat Baumann enjoys the transformation of single threads into beautiful tapestries.

“It’s fun seeing the threads building up to a pattern, just seeing that develop,” says Baumann, 89, a weaver who lives at King’s Grant. “I love seeing the colors blending together to make something beautiful. It’s fun to see how a project turns out.”

With five looms of various sizes, including a table loom, Baumann mostly weaves items such as scarves, placemats, towels and afghan blankets. She enjoys weaving in the evenings, usually while watching TV.

“It’s a relaxing activity I enjoy doing after I’ve been out all day running errands,” says Baumann, who currently is making a lap robe using some leftover wool thread. “It’s a relaxing way to spend my time, and people usually enjoy receiving these handmade gifts.”

Baumann’s sister, Elizabeth “Billie” DePuy, got her hooked on weaving. Her first loom was a 25-inch wide floor model, given to her by her now-deceased husband Henry, who was a Presbyterian minister. He also bought Baumann a 42-inch wide loom when she began learning to make rugs.

After DePuy moved to King’s Grant in 1993, the Baumanns visited frequently. They fell in love with the beautiful campus and friendly residents and staff and in 2005, they left the Fairfax home they’d lived in for 50 years to move to King’s Grant. Henry died in 2011,



but Baumann still lives in the cottage they shared. DePuy now lives in nursing care at King’s Grant.

Baumann has met many people through her interest in weaving, including through the Northern Virginia co-op she used to be part of and a weaver’s group in Martinsville that no longer exists. She has taken her looms to schools to demonstrate the art of weaving as well.

“Weaving has been a wonderful thing for me,” Baumann says. “The weavers I’ve met are interesting, down to earth people with so many interesting backgrounds.”

Baumann also feels peace of mind living at King’s Grant. She’s seen the compassionate care given to her husband as well as her sister.

“I’ve met so many new friends here, and it’s been a nice experience,” Baumann says. I feel extremely fortunate knowing that when the day comes that I need help, it will be available.” ■



An Artful Life

As an artist, Jo Ann Arnold was drawn to the picturesque setting and impeccably manicured campus at King's Grant. The environment, including the lake beside her cottage, gives her plenty of inspiration for her artwork.

Arnold's talent was nurtured from the time she was a little girl by encouraging teachers—especially a high school teacher who helped her prepare her paintings for art contests. Arnold enjoys painting in oil, acrylic, watercolors, and pen and ink. She also has experimented with other techniques, including printmaking.

Though Arnold never earned a college degree in art, she's taken many courses throughout her lifetime, including classes at the High Museum of Art in Atlanta and Christopher Newport University in Newport News, Va. She also takes advantage of art workshops given by professional artists visiting King's Grant.

Arnold's late husband Jack was a Methodist pastor, and she enjoyed contributing her talents to serve their congregations, creating many banners, logos and drawings of historic buildings. These days, Arnold primarily enjoys painting animals, but she also paints people and landscapes. One of her recent projects was using oil to paint a portrait of her great-granddaughter.

"I was able to use my art in many different ways," says Arnold, 85, who moved to King's Grant in 2008 after Jack's death. "I didn't create art for money. I just did it because I loved it."

During the 10 years before Jack's death, the Arnolds lived in her childhood home in Hampton, Va. Two of the three children they adopted and raised are still living, including a daughter who lives in Martinsville and encouraged Arnold's move to King's Grant.

"I loved living in my parents' home, but after enduring the floods from three hurricanes, I'm happy to be on higher ground in the foothills of the Blue Ridge Mountains," Arnold says.

When Arnold isn't painting in her art studio, she enjoys gardening and participating in the many activities offered at King's Grant. But her artwork keeps her grounded.

"Painting is just something I love to do," Arnold says. "It's very absorbing. I'll just be in the moment and lose track of time. It's something I always look forward to getting back to. And it seems to bring enjoyment to others, too." ■

A Rose By Any Name

From spring through early fall, Jim Arrington's yard at Sunnyside is bursting with color from the 75 rose bushes surrounding his cottage. The display of red, pink, yellow, white and shades in between brings much joy and pleasure to Arrington and his wife, Gretchen—as well as their neighbors.

“The rose is the queen of the flowers,” says Arrington, a retired high school history and geography teacher. “I don't think any flower beats the rose for beauty.”

Arrington's interest in growing roses began years ago, while he lived in Springfield, Va. He has learned as much as possible about roses and cultivated his own green thumb through trial and error. The majority of his roses are hybrid teas, which bloom repeatedly throughout the season. He also has some shrubs and climbing varieties.

Also a woodworker, Arrington has fashioned wooden markers to indicate the names of the various rose plants, which include Forever and Ever, Camelot, Bewitched, California Dreaming, JFK and Peace. His favorites are the Queen Elizabeth and Double Delight hybrid varieties.

The Arringtons, who have been married for 11 years, have lived at Sunnyside since 2008. They liked the



retirement community's setting in the Shenandoah Valley, which is within a couple hours of many of their family and friends. They have made many new friends in the community as well.

During the winter season, Arrington will keep busy with woodworking. He's currently building a harp and hopes to learn to play it once completed. His roses have been pruned, but he'll look forward to caring for them again in the spring.

“Roses can be hard to grow if you don't study and know what's best for them,” Arrington says. “I've learned a lot, and I do right by them. There's a certain amount of physical exercise with gardening, and I also have the enjoyment of beautiful flowers. It's rewarding to prune and coax the rose plants to help them develop and have maximum blooms.” ■



Savings for the Troops

Betty Allen is helping military families stretch their dollars by clipping coupons.

A member of the Alpha Chi chapter of the national service sorority Epsilon Sigma Alpha, Allen leads an effort at Summit Square to clip coupons for Save The Troops. Every Sunday, five other residents come to her apartment, and they make an evening of clipping coupons. Two other residents also cut coupons on their own and send them to Allen each week. She sorts and mails the coupons to the organization.

In October, the group clipped coupons valued at about \$9,000, for everything from food to prescriptions and baby care items.

“These families are sacrificing so much for us, I wanted to do something good for them,” says Allen, 82, who worked for 30 years at Woodrow Wilson Rehabilitation Center, retiring as volunteer director. “I hear from the organization how much these coupons are appreciated, so we really enjoy doing it.”

Allen, who never was a coupon clipper for herself, started out clipping them on her own several years ago, spending up to seven hours a week cutting them.

“That really made my arms sore,” Allen says, with a laugh. “I asked around and was able to find other residents willing to help. Now this group of us gets together to cut coupons, and we combine it with fellowship and fun. I thoroughly enjoy it.”

Allen, a self-described “hugger,” also has volunteered for various activities at Summit Square since moving to the community in 2013. She teaches residents how to play UNO—the card game—one day each week and keeps the coffee fresh for the Koffee Klatch. A frequent volunteer for Summit Square open houses, Allen is known among residents as “Betty the Baker” for the tasty treats she shares through the Koffee Klatch or monthly Bingo games. She also has been a leader at the local, regional and national level for Epsilon Sigma Alpha, including serving a stint on the organization’s national board.

“I try to stay busy because that keeps me happy,” says Allen, who also enjoys line dancing. “I absolutely love it here at Summit Square and can’t say enough good about it. The people here are wonderful, and I’ve made so many new friends here. We have so much in common, we do things together and enjoy each other’s company.” ■

Enjoying the Ride



Former Summit Square resident Raymond Huntley found great joy in his 1937 Austin Seven four-seater tourer. So much so, that he detailed their journey – from the time he and his wife, Shirley, acquired the car to the day he completed its restoration. Here’s their story, told from excerpts of writings by Huntley.

Assembled in October 1936 and crafted in maroon and black colors, the car was built to be a U.S. Army Jeep. However, the introduction of Willys-Overland changed the car’s function and it ended up becoming a junior officer’s car throughout World War II. That’s when the car’s colors changed to Army green.

Following the war, the car had two owners prior to the Huntleys. By the time the Huntleys acquired the car in 1980, it had been altered to be more like a pickup truck for farm use. Since 1957, it had been stored in a shed and had not been on the open road with its 750cc engine and speeds of up to 52 mph.

Following is how the car was restored, told in Huntley’s writings—from the car’s perspective.

“In 1980 when my shed was sold, Ray and Shirley Huntley took me to Southern Maryland. I spent the next several years in a small garage where unbelievable things happened to me. Ray disassembled every one of my precious nuts, bolts, rivets and all of my other

unmentionables. He then proceeded to have my thin rusty skin sandblasted, boy! did that hurt. After many hours and days of searching, Ray found replacements for many of my missing and worn parts – the most of which came from my Ruby relatives in England. What items he could not find, he manufactured in his workshop. After reassembling my chassis, I went for a short run on the open road and boy! did I perform like a youngster. Ray then went to work on my disfigured body: gave me back my maroon and black paint, restored my rusty chrome parts, gave me a new interior and, pardon my expression, rebuilt my “cut up rear end.” Then came my new hood and all of the many other finishing touches. In June 1988 I felt like a newborn and ready to go forth at my original pace. I’m still not 100 percent original and I do have a few vital transplants, but at 70+ years of age I’m in pretty good shape. I’m very proud of the way I look and feel. I truly love my new job of going to car shows and driving in parades. However, the thing I like most is hauling around the Huntley’s grandchildren and just acting my age.”

Sadly, Raymond Huntley passed away before the magazine published, but his family was grateful for the opportunity to share his story. ■



We Saw You

SHINE

Sunnyside Communities' Employees SHINE

*Exceptional People Delivering
Exceptional Service*

BY KAREN DOSS BOWMAN

Jeff Hylton had never heard of SHINE before he started working at King's Grant eight years ago, but the values the program represents were familiar to him. A cultural cornerstone for all three Sunnyside Communities—including King's Grant—SHINE simply encourages employees to give their best for the residents and to demonstrate pride in their work.

“It's the way I was brought up,” says Hylton, a maintenance technician at King's Grant. “I was always taught to be kind to others, to help others and to encourage others to do their jobs well. You treat people right and do your best every day.”

What is SHINE?

Created by management and a cross-section of employees, SHINE is a signature program of Sunnyside Communities that distinguishes the three campuses—King’s Grant in Martinsville, Sunnyside in Harrisonburg and Summit Square in Waynesboro. From day one on the job, employees at all three campuses are introduced to the SHINE concepts as guiding principles for “adding life to the years” of the residents. When employees at all levels appreciate and demonstrate these values, they provide compassionate care for each resident’s needs and meet the highest standards for quality service.

“Overall, SHINE represents our culture on campus of how we live and work together,” says Josh Lyons, executive director at Sunnyside. “It’s in lock step with the spirit of all three Sunnyside Communities.”

Laura Perry, human resources director at Summit Square, adds, “SHINE is an excellent program that really gives our employees a guideline for how to conduct themselves and how to handle different situations. It really ties into our mission as an organization.”

A big part of that culture is cultivating a spirit of cooperation between employees of different departments and between supervisors and the employees who report to them. Whether the need calls for all hands on deck to remove snow, or for staff members from different departments to pull together to decorate for a special event, SHINE is about working as a team to make the environment pleasant and inviting for the residents and employees alike.

“As managers, we try to model the behavior we want to see from our employees,” says Summit Square executive director Annie Fellers. “SHINE represents a tangible spirit that welcomes people into the organization and guides how we treat our residents and how we treat each other.”

SHINE brings out the best in employees and cultivates leadership skills, says Lynn DeCair, executive director at King’s Grant. One Sunday at King’s Grant, he recalls, the volunteer pastor for chapel service didn’t show up. A group of employees on duty that morning took it upon themselves to quickly put together and lead a worship service—complete with hymns, scripture and prayers.

Launched in March 2006 as a signature program of Sunnyside Communities, SHINE is a set of service standards for all employees to follow and exhibit in their daily interactions with residents, each other, and the general public. The acronym stands for:

Service before self

Hospitality with heart

Inspiring excellence in each other

Nothing less than the best

Enjoy your journey

“That’s a true example of what SHINE means on our campus,” DeCair says. “Our employees care deeply about our residents and contribute to making life meaningful here at King’s Grant.”

Promoting SHINE

SHINE is introduced during new employee orientation. From there, the program is constantly put before employees, from departmental meetings to annual personnel evaluations. Every SHINE recognition becomes part of an employee’s personnel file and can be used to make decisions about promotions and merit raises.

“We simply incorporate SHINE as part of our expectation for all employees,” says Tina Dellinger, human resources director at Sunnyside.

At King’s Grant and Sunnyside, any employee can give out SHINE recognitions in the form of special certificates that are located near the employee time clocks. They can be given anytime an employee notices a co-worker—or supervisor—doing a great job. The certificates, called “Kudos” at King’s Grant, are posted in



Jeff Hylton, maintenance technician at King’s Grant.

“I’m just doing my job, but it feels good when you do something well and get a pat on the back,” says Hylton.

the hallway where employees clock in so that others can see the recognitions. Hylton estimates that he has 15 SHINE awards in his locker, given to him by co-workers and supervisors who wanted to recognize his efforts that go above and beyond his job description.

“I’ve never worked for a place where you can get recognized for just doing your job. It really makes you feel appreciated.”

“Summit Square employees can earn silver dollars or gold coins when they’re noticed doing a good job,” Fellers says. The campus tends to do more group SHINE recognitions and recently held a pizza party for employees to celebrate a “Zero Deficiency Survey,” which indicates a high level of quality care for residents served.

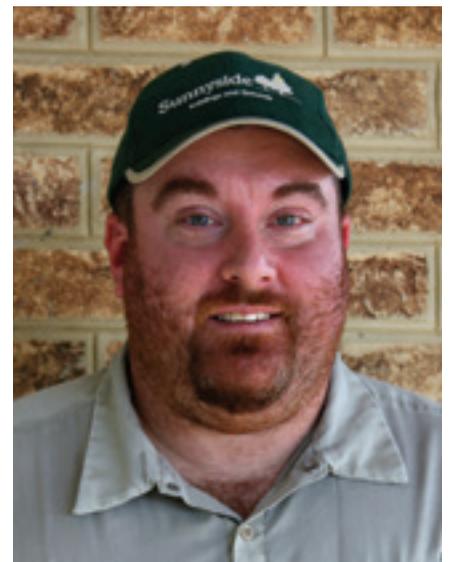
Sunnyside also gives two special awards to employees annually. The Wind Beneath Our Wings Award is given via staff nominations, and the Spirit of Sunnyside Award recipient is chosen from resident nominations.

“These awards show the employees that their work is appreciated and that what they do matters,” Lyons

says. “SHINE embodies the spirit of Sunnyside, and these recognitions validate the passion our employees show when serving residents and being good team members. It brings full circle their day-to-day efforts.”

Sunnyside maintenance technician Michael Caplinger has received several SHINE recognitions since joining the staff almost four years ago. Though he says he was just doing his job, he says it feels good when people appreciate his work.

“I feel like I’m just doing what needs to be done, but



Michael Caplinger, maintenance technician at Sunnyside.

it is nice to know that others appreciate what I've done enough to recognize me," Caplinger says. "I feel like I'm helping my fellow employees, and that builds up our team. And that team spirit helps the residents to have a good quality of life."

At Summit Square, Rita Bennett, floor maintenance technician, received a SHINE award in honor of "exemplifying all aspects of SHINE," says her supervisor, B.J. Thompson, director of plant operations at Summit Square.



Rita Bennett, floor maintenance technician at Summit Square

"Serving residents first before completing other daily tasks, Rita is kind and hospitable to coworkers, inspires others to give their best and puts in the extra work to make a difference," Thompson says. "Rita does her best on any and every project assigned. She loves her job and enjoys being at Summit Square."

Bennett recalls the SHINE program being introduced to her during orientation and strives to offer excellent service each day for residents and her fellow employees.

"I hope I can be a beacon for others as I continue to put my best foot forward and SHINE each and every day," Bennett says.

A Positive Culture

The executive directors agree that SHINE encourages teamwork within departments and across the organization. Everyone likes to be recognized for a job well done, and SHINE provides opportunities for employees to receive praise between annual reviews—and it gives a valuable opportunity for peer recognition. Those efforts improve morale and reduce absenteeism and turnover.

"SHINE shows employees that their efforts matter," DeCair says. **"Too often, stellar performances can be overlooked. Receiving praise for one's work can encourage more good efforts. The ultimate beneficiaries are our residents."**

And the enthusiasm is contagious.

"When employees see their fellow coworkers being recognized, it encourages them to go the extra mile as well," says Melissa Carter, human resources director at King's Grant.

SHINE is a value system that sets Sunnyside Communities apart from other continuing care retirement communities. It promotes employee satisfaction, which ultimately leads to a positive living environment for the residents. Managers at all three Sunnyside Communities hope that every employee will adopt the SHINE value system not only in their jobs, but also in their daily lives.

"Shine inspires you to be a better person—not just at work, but also out in the community," Lyons says. "We have a happy culture here," Fellers adds. "Our employees enjoy coming to work, and by attaching principles to a tangible program like SHINE, employees know how we want to deliver customer service. We try to make the culture as positive as possible so that we can succeed in making our residents happy." ■

Wellness Program Wins a “Most Innovative Active-Aging Program” Award

Sunnyside’s BLOOM (**B**ringing **L**ife **O**ptimizing **O**pportunities **M**ainstream) program won the Interactive Council on Active Aging (ICAA) Innovator Award for 2015 and was chosen as one of North America’s most innovative active-aging programs by the ICAA!

The ICAA Industry Innovators awards program honors excellence and creativity in the health and wellness field by recognizing organizations that have created cutting-edge wellness programs. The ICAA highlights these innovative solutions for industry leaders and governmental organizations to learn from by publicly recognizing the efforts of individuals and organizations that make outstanding contributions in industries serving the older-adult market. This award gives Sunnyside national recognition in the industry as an innovator and leader as well as national media coverage. Sunnyside’s wellness director, Annie Shaffer, created the BLOOM initiative to educate residents on the dimensions of wellness and support them in pursuing a higher level of personal wellness. BLOOM began as a seven-month initiative, but evolved into a dynamic approach to wellness and culture change. A wellness dimension was spotlighted and showcased each month through “acts of wellness” challenges, book recommendations, inspirational quotes, programs, speakers, and more. The enthusiasm and momentum created from BLOOM has continued to inspire an amazing wellness culture on our campus.



Apple Butter Festival

Sunnyside’s annual Apple Butter Festival was a huge success again this year. In addition to Sunnyside’s famous apple butter, other items for sale included baked goods, Brunswick stew, themed gift baskets, artwork, a Christmas shop and the “Sunny Treasures” gift shop was open. Local vendors and craftsmen were on site featuring a wide selection of hand-made items including scarves, jewelry, crafts and artwork.



Themed Dinners



Left: An Evening in Paris. Residents enjoyed a themed dinner in the Bethesda Theater where it was transformed into a Paris-like atmosphere complete with street lights, trees, and an Eiffel Tower. A French menu, including Julia Child's Sole Meuniere (butter fried sole) and scrumptious dessert Ile Flottante (floating island: a baked meringue drizzled with caramel and floating on vanilla custard) was served. **Right: Boots and Bling.** Residents kicked up their heels at a "Boots and Bling" themed dinner. Guests enjoyed a pig roast with all the fixings while enjoying music from the band Cantrell and Cash.

First Big Snowfall



The Sunnyside campus saw its first big snow of the season in late January. Staff worked long hours to keep the snow removed from roads and residences during this historical snowfall.

Tribute to Sinatra



Residents enjoyed professional crooner Matt Macis as he paid tribute to Frank Sinatra by singing hits such as "Come Fly With Me" and "My Way."

King's Grant Invitational Golf Tournament

King's Grant hosted its 21st annual invitational golf tournament for residents and guests. It was a fun day for all! SAVE THE DATE for the 22nd annual King's Grant invitational golf tournament to be held October 5, 2016.



Irma Smart, Ken Boward, Phyllis Parent, Paul White



Ron Rebman, Don Howe, Sandra Coleman, Wayne Slate

Veteran's Day Celebration of World War II Vets

King's Grant is home to 16 World War II Veterans and on Veteran's Day this year "The Greatest Generation" were honored in a ceremony. Each veteran was recognized and given a cap identifying him or her as a veteran. Afterwards several of those in attendance stood and talked about their experiences during the war.



King's Grant residents shared their WWII experiences on Veteran's Day.

WWII Presentation

King's Grant residents enjoyed a presentation on WWII by Bernard Marie of Roanoke, formerly of Normandy France. He spoke to the group about WWII from the perspective of himself as a child witnessing it firsthand in Normandy. He also spoke of his father as a French Resistance fighter and his continuing efforts to honor WWII vets today. Bernard brought several pieces of memorabilia such as an old newspaper from the day Japan surrendered, a helmet signed by WWII vets from Normandy and many pictures.



Bernard Marie with his WWII memorabilia.

King's Grant Clubhouse

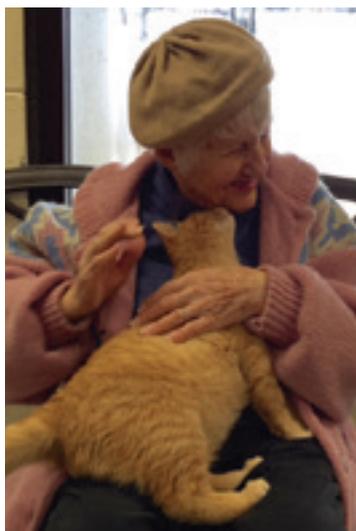


King's Grant is gearing up for the opening of its new clubhouse in the spring. Residents will soon enjoy a theatre, café and pub, arts & crafts room, business center, and a multi-purpose room that can be transformed into a dance floor. The outdoor area will include a deck, fire pit, bocce ball court, and a putting green.



For the Love of Animals

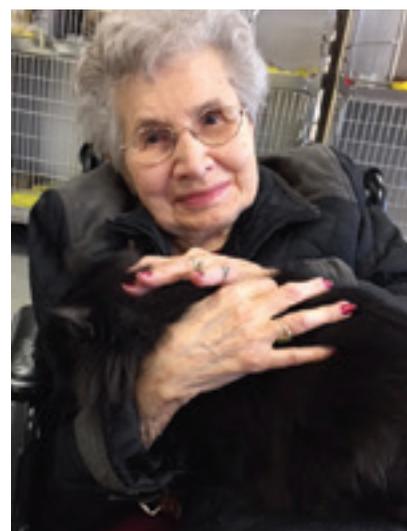
A group of King's Grant residents volunteered at the SPCA of Martinsville and Henry County. They helped to socialize the cats and puppies, rolled newspapers and put together information for mailings. This was wonderful therapy for the residents as well as the cats and dogs.



Pat Jordan



Jo Ann Arnold



Marie Thompson

Lobby Renovation

The main lobby at Summit Square recently went through a major renovation. New paint, furniture and lighting were added. The residents are enjoying the open space as well as the new “Koffee Klatch” where they gather for coffee and conversation. A Celebration of Blessings was held in November to re-open the lobby.



Care Packages for Veterans

On Veteran's Day, residents assembled care packages to honor veterans and show gratitude to troops serving our country overseas. It was a celebration for those who have served and a show of support to those who are currently serving. Donations were taken for several weeks. This project was part of Summit Square's wellness challenge to residents to focus on the positivity around them with an "Attitude of Gratitude" which highlighted five ways to create a positive attitude and encourage a grateful mindset.



Spirit Week

Summit Square held its annual "Spirit Week" where each day held a different theme. Themes included a twin day, sock day, autumn day and a decade's fashion show. The week rounded out with the crowning of a King and Queen at a dance held for participants.



Berenice Archambeault and Lorain Kent dressed as twins.



Bill and Polly Thomas were named King and Queen during Spirit Week.

High Tea is Served



Residents enjoyed their first "High Tea" in the newly renovated lobby.

Art Lesson



Volunteer Darin Docekal led residents through a step-by-step art lesson in mixed media painting.

Donor PROFILES

MOVING GIFTS

BY KAREN DOSS BOWMAN



Meg Haislip

As Meg Haislip headed to church one Sunday morning, her 1996 Ford Taurus sputtered and hissed. She thought it just needed gasoline. But the next day, after filling up the gas tank, the car shivered again while stopped at a traffic light. A frustrated Haislip decided to get rid of her car.

“I realized, ‘I don’t even need this car,’” says Haislip, who moved to Summit Square in 2005. “It’s a pain in the neck. The insurance has gone up, AAA has gone up and gas is sky-high. Summit Square takes me everywhere I need to go. I decided to give it to someone who needed it.”

Haislip and her son began calling charitable organizations, trying to find an organization that would take donated cars. No one would return their calls. Finally, she called Rob Murphy, Sunnyside’s director of development, who was happy to take the car off her hands. Sunnyside then sold the vehicle

and contributed the proceeds to the Fellowship Fund, which provides financial support for residents whose resources have run out.

“The staff at Sunnyside handled everything in the process so that all I had to do was go to the bank to get the title—it was so easy,” says Haislip, a retired elementary school library clerk who is now Summit Square’s librarian. “It’s important to keep the Fellowship Fund going strong. If I was ever in a situation where I didn’t have enough money to pay for my expenses to live here, it’s comforting to know the Fellowship Fund will support me.”

“The donation of a car does a lot of good for both Sunnyside Communities and for the donor,” says Murphy. “The donation can be used to support Sunnyside’s Fellowship Fund which helps residents whose resources have run out, or the donated car can be a budget-saver by providing transportation



Charlie Bell

for taking residents to their appointments or can be an option for staff who need to travel between campuses for meetings or training programs. The donors not only receive tax benefits, but also receive peace of mind when they are no longer tied down by the responsibility of car ownership. It's a win-win all around."

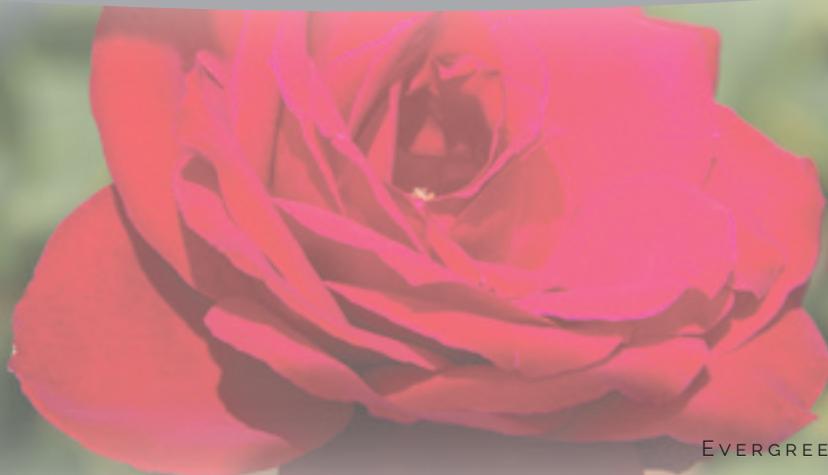
When Charlie Bell received his last auto insurance bill in 2014, he cringed. He realized car ownership was becoming more and more expensive.

"I got that insurance bill and thought, "There's more of this coming in the mail,"" says Bell, who goes out on Sunnyside's shopping shuttle every Tuesday. "I thought of all the expenses I had because of this car and realized it wasn't worth it. There are people here who will take me anywhere I need to go, to doctor's appointments or shopping or on day trips."

Bell contacted Murphy to inquire about donating the fire engine red, 2005 Ford 500 he had purchased to transport his late wife Gwendolyn to doctor's appointments during her battle with brain cancer. The car was comfortable and still in good condition. Sunnyside kept the car for staff use, and Bell will receive a tax credit based on two official appraisals.

For Bell, whose active lifestyle includes regular bowling and singing in the Sunnyside chapel choir, giving the car away has been freeing. He no longer carries the financial burden, and he doesn't have to worry about oil changes, he says.

"I'm happy living here, and Sunnyside takes good care of me," says Bell, a U.S. Navy veteran. "I'd recommend for any resident to consider giving up their wheels." ■



Get to Know Us

TINA SALCEDO

SUNNYSIDE

Working at Sunnyside for nearly five years as a marketing sales counselor, Tina Salcedo enjoys helping people start the next exciting chapter in their lives. “It honestly makes my day when residents I had the pleasure of working with stop in my office to say how happy they are at Sunnyside. They really make me feel appreciated and that I had a positive impact on their life,” she said.

“Joy” is the word that comes to mind for Salcedo when describing what it means to be a part of the Sunnyside family. “It is a feeling you get just walking around campus. Everyone is so friendly and warm. It’s like we are all here, residents and staff alike, to make life a little better for someone else,” she commented.

Spending time with her three children, taking college classes, traveling, and spending time on the water with family and friends are just a few of the things Salcedo likes to do. She also has an adventurous side, sharing that she once jumped out of an airplane, on purpose!



DORIS BIGA

KING'S GRANT

Doris Biga has been a part of King’s Grant since before it opened its doors. For 23 years, she has served as King’s Grant’s marketing director, and she knows just about every person who has made King’s Grant their home.

Getting to know prospects and residents, hearing their unique stories, and helping them make important decisions about the next chapter in their lives are just a few of the things Biga says she enjoys most about her job. “I’m grateful to be a part of the King’s Grant community and appreciate being able to share my life’s journey with the wonderful residents and staff of King’s Grant,” she commented.

Outside of King’s Grant, Biga enjoys spending time with family, traveling and gardening. Her love for traveling goes way back. Before starting a family, she and her husband, Bill, spent two months traveling across the United States – staying in a tent!

BETSY THORPE

SUMMIT SQUARE

Betsy Thorpe got her start with Sunnyside Communities in high school when she worked as a front desk receptionist on the Sunnyside campus and later as the food and beverage manager of the Tartan Grill. In March, 2011, she became the marketing director at Summit Square.

Thorpe says she enjoys interactions with people the most. “I feel so honored to be in a position where so many different life experiences are shared with me,” she said. “When I walk through the doors of Summit Square, I’m part of a family.” Reflecting on the quote by Confucius – “Choose a job you love and you will never work a day in your life.” – Thorpe commented that it means everything to have found her passion at a young age.

When she’s not at Summit Square, Thorpe and her husband, Jay, are often found on the sidelines of soccer fields or basketball courts cheering on their two on-the-go daughters. “Cheering mom is most definitely my favorite role,” she said.





Make a Gift and Leave More FOR YOUR FAMILY

A charitable lead trust (CLT) is an individually managed trust that holds your gift of appreciating assets, pays income to Sunnyside for a period of years and then returns the remaining principal to you.

This gift plan enables you to leave more for your loved ones and make a gift to Sunnyside Communities at the same time.

There are two types of CLTs. If the lead trust returns its principal balance to you, it is called a **grantor lead trust** (see sidebar). But say you prefer to pass assets to your heirs. Not a problem. Many donors choose a lead trust that pays its principal balance not to themselves but to other remainder beneficiaries. This version of the CLT is called a **non-grantor lead trust**.

Reduce the tax burden for your heirs

Non-grantor lead trusts reduce the cost of passing property to your heirs in two ways:

1. First, the estate- and gift-tax value of assets you place in your lead trust will be reduced by the present value of the income the trust will pay to Sunnyside Communities. The longer the lead trust pays us income and the more income it pays us, the larger your tax deductions will be.
2. Second, the taxable value of the lead trust assets is fixed as of the time you establish the trust. Any subsequent increase in the value of the assets will pass to your heirs outside your estate and thus free of estate and gift tax.

This combined reduction in the taxable value of the lead trust assets means your family often receives more from an estate plan containing a lead trust than from an outright bequest from you. Your heirs will thank you. And so will we.

Planning Points

- A non-grantor lead trust can be funded with shares in a growing family business, lowering the cost of passing ownership to the next generation.
- The income earned by a non-grantor lead trust while it is in operation is not taxable to you.
- The trust can run for a term of years or the lifetime of an individual.
- Unlike most other gift plans, a lead trust provides immediate benefits to Sunnyside Communities. Payments from a CLT can be used to fund capital projects as well as our endowment.
- A lead trust can pay Sunnyside a fixed amount of income every year or pay us a fixed percentage of the value of trust principal, as revalued annually. Format choice has some effect on your tax savings.

Let us help you and your advisors model the different options as you consider your gift plan. We're ready to show you how a lead trust can work for Sunnyside Communities, for you, and for your family.

Concerned about high income tax liability?

Are you in a high earnings period? Redirecting some income to charity could make good financial sense. If you want to accelerate future deductions into the current year but don't want to permanently part with a valuable asset, consider a **grantor lead trust**.

This creative gift plan holds your gift of appreciating assets, pays income to Sunnyside Communities for a period, and then returns the assets to you. You receive an upfront income tax deduction for creating the grantor lead trust, which is the present value of the total income payments to us. (You receive no income tax deduction when you establish a non-grantor lead trust.)

The trust's annual earnings (minus the distributions to us) will be taxable to you. However, if the amount of our income and the length of time we receive it are balanced correctly, the upfront deduction can offset this subsequent tax.

QUESTIONS? WE CAN HELP.

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This article is intended to provide general gift planning information. Sunnyside Communities or its employees are not qualified to provide specific legal, tax or investment advice, and this publication should not be looked to or relied upon as a source for such advice.

Consult with your own legal and financial advisors before making any gift.

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To order your limited edition print, please contact Rob Murphy, Director of Development,
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www.sunnysidecommunities.com