

Revolutionizing the experience *of aging*



WesleyLife Annual Report

2024

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2024



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A Message *from our CEO*

Our vision, which is central to everything we do, remains focused on **revolutionizing the experience of aging.**

As I reflect on the past year, I am reminded of how much we have accomplished. It has been a year of growth, learning, and resilience. And as always, I'm deeply grateful to everyone who has contributed to our success.

First and foremost, **I want to extend my sincere thanks to our board of directors.** Your strategic guidance continues to be vital to our success. Your leadership has helped us navigate both opportunities and challenges, and your unwavering commitment to our vision is a constant source of inspiration.

I also want to express my gratitude to our team members. Each one of you plays an essential role in our daily work, and your efforts do not go unnoticed. Whether you're directly serving our residents, supporting operations behind the scenes, or contributing in countless other ways, your dedication makes a real difference. It's because of you that we can create a place where those we serve can thrive, find purpose, and, most importantly, pursue their joy.

Our vision, which is central to everything we do, remains focused on revolutionizing the experience of aging. We aim to be the most dynamic and inclusive champion in this effort, changing how society views aging and ensuring that everyone has the opportunity to live with dignity, purpose, and joy. **This year, we made great strides in realizing that vision.**

One of the key milestones of 2024 was the welcoming of residents to Neighborhood 19 at Brio, our new single-family home and townhome development in Johnston. An exciting example of how we're thinking in a new way about aging, Neighborhood 19 was designed with the future in mind, utilizing smart technology to make living more efficient and comfortable. It's a model we hope to replicate and expand upon in the future. We also made important strides at The Village, where we've set the stage for a major redevelopment, and at Park Centre in Newton, where we're taking significant steps to enhance our memory care services. And WesleyLife at Home continues to lead the way in serving clients in their homes with the introduction of Des Moines' only home-based palliative care service (read more about that on pages 10-11.)

Fundamental to much of this work is **WesleyLife Foundation**, which experienced an impactful year in 2024. The Foundation's efforts have been instrumental in supporting our work, and we are deeply grateful



for its continued commitment to our mission. Funding provided by the Foundation ensures that **we can continue to innovate and grow, and we thank our generous donors for being difference-makers.**

Looking forward, we remain focused on expanding our reach and impact. We are determined to broaden our vision, making it available to more people who can benefit from a fundamentally different perspective on aging — one that emphasizes joy, fulfillment, and a sense of purpose at every stage of life. I am excited for what lies ahead — and for the chance to create real change in the aging experience for generations to come.

Rob Kretzinger
President and CEO, WesleyLife

Leading *the way*

WesleyLife Board of Directors

WesleyLife is governed by an all-volunteer board of directors. Since 1947, the Board has led the growth of WesleyLife from a single retirement community to a comprehensive network of health and well-being services and initiatives for older adults, wherever they call home. Drawing upon both life experience and areas of professional expertise, members provide oversight for the entire organization and define the ways WesleyLife lives its mission.



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Broadening our *reach* by doing good in 2024

More than **600 people**
were provided
meaningful, compassionate
end-of-life services
through WesleyLife Hospice.

**Educational
scholarships**
provided by WesleyLife helped
20 team members
enhance their careers.

More than **2,000 dedicated team members** served more than
13,000 residents and clients throughout the organization.

In our
communities
and through
our programs,
we proudly served
**nearly 500
military
veterans.**

A record 
428,116 meals
were delivered to
older adults and military
veterans — **a 20% increase
over 2023's numbers.**

Unparalleled generosity

In 2024, WesleyLife Foundation secured a **noteworthy number of donations to benefit services and programs** throughout the organization and impact thousands of lives.

D

ear Friends and Neighbors,

As we reflect on the past year at WesleyLife, **we are grateful** for your support of our mission. Because of you, older adults in our communities received critical services that helped them remain **safe, nourished, and connected**.

This year, your generosity helped:

- **More than 200 residents** stay in their homes through our Good Samaritan Promise
- Deliver **nearly 430,000 meals** to homebound older adults and veterans
- Provide hospice care to over **600 individuals**
- **Save 8 lives** through Meals on Wheels wellness checks

Each number represents a life you've touched.

Like Rita, who hadn't eaten in three days before finding Meals on Wheels.

Or Patricia, who shared:

"When my nurse, Pam, noticed a decline in my health, she increased wellness visits to make sure I was OK. Losing my husband has been hard, and we are grateful for WesleyLife."

Or Mildred's family members, who value that our memory care team supports her with understanding and respect. And the many military veterans who rely on Meals on Wheels not only for nutrition, but for human connection.

As the need grows — with rising food costs, increasing isolation, and a growing older population — your continued partnership is essential. Whether through a one-time gift, monthly support, or including WesleyLife in your will, **your generosity helps meet these challenges**.

Every meal, every visit, every extra day someone remains at home — these are made possible by you. On behalf of everyone at WesleyLife and the individuals we serve together, **thank you for delivering not just needed services, but love and hope as well.**



Sophia S. Ahmad
Vice President of Philanthropy

P.S. As you review this report, please consider how you might continue your support — through advocacy, volunteering, or giving.



Scan the QR code to learn more.

WesleyLife Foundation Board of Directors

WesleyLife Foundation is governed by an all-volunteer board of directors. Drawing upon both life experience and areas of professional expertise, board members provide oversight for the Foundation and define the ways the group helps to execute the WesleyLife mission.



A



B



C



D



E



F



G



H



I

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Philanthropist and Community Leader





The WesleyLife
Promise

AT WESLEYLIFE,
"home" means "forever" —
thanks to the Promise

Rooted in Christian compassion, WesleyLife is guided by the belief that all older adults deserve opportunities to thrive — to continue growing, connecting, and living with joy, no matter their financial circumstances. One of the most impactful ways we uphold this belief is through the WesleyLife Promise.



Since 1947, the Promise has offered peace of mind to residents across WesleyLife's Communities for Healthy Living: If they outlive their financial resources through no fault of their own, they will not be asked to leave their homes or see a reduction in the care they receive. **This safety net is made possible solely through the generosity of donors – and it changes lives every day.**

In 2024, Lena M., a resident of one of our communities in the Des Moines area, experienced the power of the Promise firsthand. Following a series of health challenges, Lena needed to transition from independent living to long-term nursing care. Though she had planned carefully for retirement, the unexpected shift brought with it financial uncertainty — **until she learned that the Promise would help cover her expenses, allowing her to focus on recovery rather than worry.**

In a community outside the metro, Thomas W., a beloved neighbor and Air Force veteran, was navigating a lengthy short-term rehabilitation stay following a stroke. As medical costs began to outpace his savings, Thomas feared he would need to leave the community he had called home for more than a decade. Thanks to donations to his community's Good Samaritan fund, Thomas received the help he needed to remain in place — with the dignity and support he had earned.

And at a WesleyLife community in eastern Iowa, Eva* and Glenn T.* found themselves in unfamiliar territory. **Married for more than 60 years, they had never imagined a time when their nest egg wouldn't be enough.** As Glenn's health care needs intensified, their expenses grew — but thanks to the Promise, they were able to stay together in their apartment, supported by the care they needed and the community they loved.



Each WesleyLife community supports the Promise through its own Good Samaritan or Good Shepherd fund, sustained by philanthropic giving. These donations not only help residents afford care not covered by government programs, but also provide everyday essentials and comfort items — often during life's most vulnerable moments.

As people live longer, even the best financial planning may not fully account for the cost of extended care. That's why the WesleyLife Promise is more important than ever — ensuring that residents can remain in the communities they love, surrounded by friends, neighbors, and care teams who feel like family.

Thanks to the generosity of those who believe in our mission, WesleyLife continues to stand by the Promise — because for us, "home" truly means forever.



Please consider donating to the Good Samaritan/Good Shepherd fund at the community of your choice to help keep residents safe and healthy at home. Whether you are giving for the first time or have supported these funds previously, we appreciate your compassion and generosity!

The *impact* of the WesleyLife Promise

Preserving dignity through the Good Samaritan Promise

Good Samaritan and Good Shepherd funds uphold our fundamental commitment: No resident will ever be asked to leave their home with WesleyLife due to financial circumstances beyond their control. Gifts to a specific community's fund directly support residents on that campus, helping to preserve their security and dignity.

Good Samaritan/Good Shepherd total endowed funds, including amounts raised in 2024:

Wesley on Grand	\$4,341,929
The Village	\$1,351,956
Park Centre	\$1,072,712
Heritage House	\$693,941
Halcyon House	\$1,244,107
Edgewater	\$3,143,158
Hearthstone	\$44,336
Brio of Johnston	\$30,567
WesleyLife (Network Support Center)	\$579,677



Anonymous Park Centre Good Samaritan Endowment Park Centre **\$4,729,136**

Scholarship Endowments Dahl Adult Day, a WesleyLife Adult Day Center **\$5,674**
Willowbrook, a WesleyLife Adult Day Center **\$29,460**

Honoring through endowment

Creating a legacy that endures

Contributing to an endowment is a powerful expression of a donor's values and vision for the future. Those who give to a WesleyLife endowment become part of a perpetual source of support that will touch lives for generations to come.

Endowment gifts are invested carefully and permanently in accordance with our investment policy. Each year, up to 5 percent of the rolling 36-month average fund value becomes available to fulfill a donor's designated charitable purpose. This approach ensures a donor's legacy continues in perpetuity while making an immediate and ongoing difference.

Endowed funds, including amounts raised in 2024, are included below.

\$109,354 **Baker Employee Assistance Endowment** Provides funds to help team members at Wesley on Grand in their greatest time of need.

VanDyke Memorial Nursing Scholarship Established in memory of Helen Messenger and Gerald Van Dyke to provide nursing scholarships to team members at Park Centre. **\$74,479**

Other Endowments **\$2,314,671**

Total of all endowments:

\$19,765,157



WesleyLife palliative care nurse Amber Dvorak visits client Carole Peterson in her home.

EVOLUTION

of the **revolution:**

**WesleyLife introduces
palliative care**

As part of our ongoing commitment to **helping people live well wherever they call home**, WesleyLife at Home has introduced a meaningful new offering to the Des Moines area: home-based palliative care.

While many people associate palliative care with hospice, the two are not the same. Palliative care is designed for individuals living with serious illnesses — not necessarily those at the end of life — and focuses on relief from pain, stress, and other symptoms to support comfort and quality of life. With this new service, **WesleyLife becomes the first organization in the Des Moines metro to provide palliative care directly in the home**, meeting people where they are in every sense of the phrase.

"Palliative care can be an essential layer of support for someone dealing with the challenges of chronic illness," Aaron Wheeler, vice president of WesleyLife Home and Community-Based Services, says. "It's appropriate at any stage of illness and can be delivered alongside curative treatments. Our goal is to help people feel better — physically, emotionally, and spiritually — while continuing to live life on their own terms."

For Carole Peterson of Grimes, Iowa, that support has made all the difference.

"Before I started receiving visits from Amber [Dvorak], my palliative care nurse, I honestly didn't think I'd ever live independently again," Carole says. "I'd had a couple of near-death experiences, and I ended up in hospice. I thought that was it."

Today, Carole is back in her home — and thriving.

"Now I'm able to get out, to be in public again, and I don't have to worry so much," she says. "Before, I felt like I didn't have a life. When you're in a hospital or receiving care somewhere else, you're stuck staring at four walls. Now I can get around more. Palliative care has been a godsend."

The model of care is a team approach. A person receiving palliative care may be supported by physicians, nurses, social workers, chaplains, dietitians, and other professionals, often working in tandem with a person's existing health care providers. This interdisciplinary focus allows for expert symptom management and open communication about care goals within the familiar comforts of home.

Before, I felt like I didn't have a life. Now, I can get around more. Palliative care has been a godsend.

— Carole Peterson, palliative care client

WesleyLife is uniquely positioned to offer palliative care in this way. With a broad range of in-home services already in place — from skilled nursing and therapy to nutrition support and adult day services — we've strengthened our holistic approach with the addition of this service. For clients and families, **that means fewer hand-offs, more consistency, and a trusted partner through the journey.**

Bringing care into the home removes another significant barrier: transportation. For someone experiencing a serious illness, traveling to and from appointments can be both taxing and impractical. By offering palliative care where people live, we make it easier for them to receive the support they need — without compromising their independence.

"People want to age at home," Wheeler says. "By expanding the types of services we can provide there, we're helping make that not only possible, but sustainable."



Revolutionizing through **generosity**:

We thank our donors

LEGACY

THE LEGACY CIRCLE represents individuals who have named WesleyLife in their wills or estates. We are deeply moved by the decisions of these individuals to impact our mission beyond their lifetime.

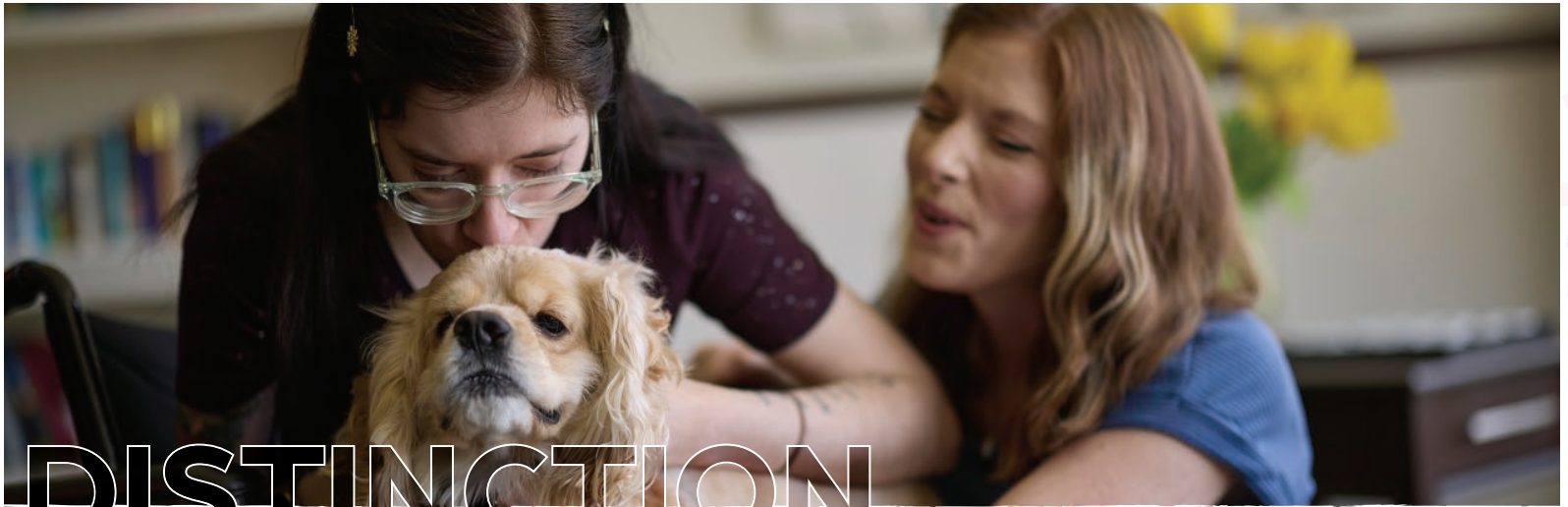
We work closely with current and future Legacy Circle members to ensure the impact they intend will be realized, and we are honored to recognize and thank them.

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WesleyLife recognizes living donors and organizations with a lifetime giving total of \$100,000 or more through 2024 as Donors of Distinction. By achieving this level of giving, these donors have demonstrated trust in and commitment to WesleyLife's mission, vision, and values.

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Revolutionizing through generosity: *We thank* our donors



ANNUAL

ANNUAL DONOR CIRCLES

We gratefully acknowledge the following individuals and organizations for their 2024 contributions to WesleyLife. The donor levels include all gifts and pledges made from January 1 through December 31, 2024. Future pledge installments are recognized in the year they are originally committed.

Visionary \$500,000+

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John Fisher and Jann Freed
Mark and Diane Funk
Frank and Shari Gargano
Melvin and Kim Gawley
Ms. Ruth Gorter
Marlene and Mark Hakes
Angie Haney
Janet Harvey
Dana Hashman
Heidi Heath
Onnalisa Heck
Ruth A. Hiatt
David Hoeksema
Barbara Hudson
Lori Hughes
Allie Johnson
Gabrielle Johnson
Matthew and Maureen Johnson
Julie Juffer
Bianca Kanis
Roy and Carolyn Kaye
Karie Kesterson-Gibson
Marion and Glenda Klyn
Amy Knight
Ginny Krichau
Lisa Lange
Carl and Dixie Larson
Nancy Lasell

Mary Lawyer
Ruth and James Lee
Amanda and Kyle Leinen
Wendy Lemke
Elaine Malek
Robert and Joan Matheson
Paul J. Meginnis
Miller Electrical Services
MMHF E-Commerce
David and Rita Moeller
John and Karen Moenck
Brianna Mooers
Elodie Morrison
Northwest Bank
Robert Osuch
Realf and Ann Ottesen
Overton Funeral Home
Judy Palko
Laura Paplow
Pella Cincinnati and Louisville
Pella Northland
Pence-Reese Funeral Home
Peoples Bank
Ward and Alyssa Phillips
Sandra Prendergast
Lisa Price
Principal Financial Group
George and Twilah Raes
Mary Rice
Keith Ringelestein
Sherry Robinson
Bob and Patricia Roehm
Jean Rommes
Kristy Rosenthal
Wavern and Norma Rozenboom
Charles Rus
Carol Sachs
Sharon and David Schlitter
Annette Sheehan-Lumley
Donna Simmons
Ford Singbush
Donna and Bob Smith

Roy and Lorane Smith
Valerie Sondag
Christopher Sorensen
Aimee Spores
Deloris and Elmer St. Clair
Audrey Stark
Adam and Amy Taylor
Laraine Taylor
Susan Terry
William Tomlinson*
Kimberly Townsend
TruBank
Kevin and Mona Ulmer
Roger and Connie Underwood
United Church of Crawfordsville
Fred Van EE
Krista and Mike Van Hooser-Perin
Leo Van Vark
Charles Vander Waal
David and Doris Wait
Walker Family in memory of Marlene
Ruth Walker
Wallace Family Funeral Home
Barry Wallerstedt
Donna Walther
Veronica Waterman
Leona Wetsch
Judy Winkelpleck
Patricia and James Wistrom
Gretchen Woeste
Michelle Young
Sharon and Bill* Young

Gifts in Kind

Hy-Vee
La Mie Bakery
Allen and Donna Ricks
Mary Anne Rigali
SCHEELS
Twisted Bean
Jarene Wilch

Enhancing **health** and **well-being**
in 27 counties throughout Iowa:

Where We Serve



WesleyLife Communities

Brio of Johnston – Johnston
Edgewater – West Des Moines
Halcyon House – Washington
Hearthstone – Pella
Heritage House – Atlantic

Park Centre – Newton
The Village – Indianola
Wesley on Grand – Des Moines
Fieldstone of DeWitt – DeWitt
The Summit of Bettendorf – Bettendorf

WesleyLife At Home

Home health care, in-home services, nutrition, hospice care, palliative care, public health services (adult day services available in Polk and Jasper counties), and WellAhead

2024 financials

at-a-glance

Audited Balance Sheet

ASSETS:

Total cash and investments	\$ 101,861,286
Receivables	\$ 11,709,843
Other investments	\$ 225,430
Pledges	\$ 2,379,809
Right-of-use assets	\$ 594,151
Property and equipment	\$ 291,425,814
Other assets	\$ 2,453,127

Total Assets	\$ 410,649,460
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NET ASSETS:

Net assets without donor restrictions	\$ 8,835,398
Net assets with donor restrictions	\$ 32,357,947

Total Net Assets	\$ 41,193,345
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Audited Statement of Operations

REVENUE:

Net direct services revenue	\$ 155,638,427
Use of contributions	\$ 6,901,898
Non-operating revenue	\$ 7,162,220

Total Revenues	\$ 169,702,545
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EXPENSES:

Salaries, benefits, and contracted expenses	\$ 102,373,465
Depreciation and amortization	\$ 18,203,828
Interest and amortization of bond issue costs	\$ 8,103,732
Other expenses	\$ 49,426,105

Total Expenses	\$ 178,107,130
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Excess (Deficit) of Revenue over Expenses	\$ (1,242,365)
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TOTAL CHARITABLE CARE:

Total Charitable Care	\$ 6,860,400
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STEWARDSHIP RESPONSIBILITY NOTE

As a non-for-profit organization, we strive to secure resources that sustain and advance our mission in multiple ways: providing charitable services to those in need, bridging occasional operational gaps, investing in essential facilities and equipment, enhancing our programs, and planning for future growth.

The generosity of our donors is vital to this work. Donor contributions directly enable us to fulfill our mission today while building capacity for tomorrow's challenges and opportunities.

Growing the revolution



Redevelopment at The Village

As we move through our 78th year, WesleyLife continues to illustrate our reach-broadening mindset with a period of unprecedented growth and development!

We're proud to have welcomed residents to **Neighborhood 19 at Brio**, a thriving development of single-family homes and townhomes on the campus of Brio of Johnston in Johnston, Iowa. With zero-step entryways, ample gathering spaces, and life-enriching floor plans, the homes encourage vibrant and independent living just steps away from Brio's services and amenities.

Projects under way in 2025 include a sweeping redevelopment of **The Village**, our campus in Indianola, Iowa, to add independent living apartments and townhomes, a modern health center with private suites, a new entrance to the campus, updated culinary spaces, and a wellness pavilion, among other enhanced amenities. And at **Park Centre** in Newton, Iowa, we're answering the call to provide enhanced memory care services to Jasper County residents with a redevelopment that will pave the way for the brand of person-directed living for which our communities have become widely known.

In addition, we continue to build on the 2024 launch of **WellAhead**, a WesleyLife well-being experience that gives members the opportunity to continue to live independently at home while enjoying programming designed to help them stay healthy.

The program also assures residents that if they need care at some point, they will be able to access it immediately from WesleyLife at no cost other than their membership and monthly fees.



Household renovation at Park Centre



Neighborhood 19 at Brio



WellAhead member Mary Robertson and team member Samantha Snider

We are grateful for the dedicated team members and philanthropic support that make it possible for WesleyLife to continue to unveil further opportunities to revolutionize the experience of aging! Make sure to follow us at wesleylife.org and on social media as we continue to extend the reach of our vision.



Revolutionizing
the experience
of aging