

FY24
Annual
Report

Elevate Innovate Relate



John Knox
Village

FY24 Annual Report

April 1, 2023, to March 31, 2024



I love that members of the John Knox Village community are not interested in just “getting by” in our work and volunteerism. We strive every day to be the best we can be because our actions make the lives of the special people we serve as wonderful as possible. It’s this mindset that has enabled us to provide care and services for 54 years. During fiscal year 2024, we took steps to further ensure our ability to provide quality care and services for the long haul.

We outlined several strategies that will allow us to continue our tradition of enriching lives and building community. To create clarity in our priorities and help keep us all moving in the same direction, we are focusing on about 30 initiatives that will **Elevate** the customer experience, **Innovate** service and care and inspire us to **Relate** to enhance a positive culture. After a tremendous amount of work, we completed multiple projects tied to our goals throughout the continuum of care. A few examples of the great projects we are working on for our community include the following.

- We continue our campus redevelopment program by completing another phase of our popular villa homes, as well as renovations and updates to the Villager Inn and Villager Complex. We also announced the construction of the Courtyard E Building.
- To enhance care as well as to create more operational efficiency at the Village Care Center, we made the strategic move to consolidate the skilled nursing center’s various care neighborhoods into two wings.
- We formed a partnership with a health care provider to open an on-campus medical clinic for Village residents and members of the surrounding community.
- To create safer environments, increase customer service and support our health care coordination efforts, we are implementing more and varied technology throughout the continuum.

Elevate Innovate Relate

- We continue to support a culture of P.R.I.D.E. by encouraging all members of the Village community to take Personal Responsibility in Delivering Excellence.

Achieving these and other foundational strategies are important to the Village in both the short and long term. First, these initiatives will help prepare us to serve the growing and changing senior population. Secondly, they will help us differentiate ourselves from other retirement communities. Finally, successful implementation of these and the other projects you will read about in this report will ensure our financial sustainability into the future.

However, I must point out that accomplishing these goals is not as important as what we will become as we achieve these goals. The Village will be a better place for the people we serve, especially since all our ideas and decisions are guided by our vision to be the leader among senior living communities in the Greater Kansas City area and our mission to enrich the lives of older adults through community living, “Enriching lives, building community.”

Dan Rexroth, President and CEO





Members of the executive leadership team recently gathered to exhibit the keywords that are helping the Village remain focused on its strategy to fulfill the John Knox Village mission.

ABOUT THE FY24 ANNUAL REPORT

This report offers a glimpse at how the Village community is united in its goals to **Elevate** the customer experience, **Innovate** service and care, and **Relate** to enhance a positive culture. Employing these three actions in all that we do helps the Village stand out as a leading provider of senior care and housing. We are prepared to serve the growing and changing senior population and to ensure financial sustainability into the future. In other words, our focus is to find ways to Elevate, Innovate and Relate because the outcomes provide us with the keys to achieving our mission and vision.

Elevate

THE CUSTOMER EXPERIENCE

Focusing on the needs of today's residents, patients and associates and anticipating their wants and expectations in the future

Strategic Campus Redevelopment Projects

NEW E BUILDING

After the successful completion of The Meadows expansion, John Knox Village set its sights on another redevelopment project, this time in the Courtyard neighborhood.

The new E Building is being built in the location of the former Lindbergh Building. It will have 52 beautifully appointed one-bedroom, one-bed-plus-den, and two-bedroom apartment homes, all of which are entry fee units. The five available floor plans are spacious, and the layouts are based on popular apartments from recent projects.

"In addition to moving in to new homes with beautiful finishings, E Building residents will have easy access to a wonderful array of services and amenities, including a concierge, restaurants, salon, movie theater, community center and more," said Marybeth Roberts, director of sales, marketing



Demolition of the Lindbergh Building

The demolition process started in mid-FY24 and included salvaging reusable materials, much of which was donated to the Hobby Hut. After 70% of the 52 E Building apartments sold, construction of the new building began.

and communications.

The project also includes the construction of additional parking spaces and a new dog park. The Village anticipates it will begin welcoming new residents to the four-story E Building in late summer 2025.

POPULAR VILLA PROGRAM CONTINUES

The Village recently built 14 new villas, including single family homes, duplexes and triplexes, in the most-recent phases of the popular villa program.



VILLAGER INN AND VILLAGER COMPLEX

With the aim of improving resident satisfaction and enhancing first impressions, the Village transformed multiple areas of the Villager Inn and Villager Complex with projects ranging from touch ups to complete renovations.

"We are so excited about the results of the renovation of this popular campus destination," said Maria Timberlake, vice president of senior living. "Offering a variety of amenities for residents, not to mention the number of visitors we welcome via the sales area and guest rooms, the Villager Inn and Complex are high-traffic buildings that have been beautifully transformed with modern colors, finishes and design."

• EXTERIOR IMPROVEMENTS

Projects included new landscaping; the installation of an irrigation system; new windows; construction of a bus drop-off lane; and repaving the west parking lot

• PLACES LOBBY

The area was redesigned and refurbished to accommodate a new concierge desk and the addition of a window to create a better view of the drop-off lane; lobby restroom updates; and new paint and flooring.

• PLACES RESTAURANT

The enlarged waiting area accommodates the new host stand and Places Market Essentials – a kiosk offering milk, bread and other pantry staples. The dining room underwent a transformation with the removal of walls and the addition of translucent panels, brightened lighting, paint and flooring, as well as new tables, chairs and booths. The Plaza and Gallery private dining rooms also received new flooring and seating. Finally, the kitchen acquired a new hood and combination oven to increase efficiency.

• VILLAGER SALON

The salon was transformed with new paint, flooring and decorative tile, which together highlight the three stylist stations, two pedicure chairs and two nail stations. An ADA-accessible restroom also was added for customers.

• MARKETING LOBBY AND HALLWAYS

New paint, flooring, lighting, furniture and artwork refreshed the lobby and corridors.

• BOWLING ALLEY AND BILLIARDS HALL

In addition to new paint and flooring, the bowling alley received upgraded seating; refreshed lanes, gutters, bumpers and lane caps; and a new scoring system.

• VILLAGER HALLWAYS

Updates to the corridors on each floor of Villager East, Villager North and Villager West included paint, wallpaper and carpet. Luxury vinyl planking installed by the elevators replaced the original tile flooring.



Places Restaurant



Villager Salon



Bowling Alley



Villager Concierge

Elevate

Village Care Center Moves Increase Community and Efficiency

The Village Care Center made moves to increase operational efficiency that, in turn, helped to strengthen the sense of community among long-term residents, short-term patients and staff.

In early FY24, the skilled nursing successfully moved patients from the short-term rehabilitation unit as well as the residents of the memory care neighborhood across the building to the 100 unit, also known as the Garden View Neighborhood. The Garden View wing has larger, recently renovated private rooms; more spacious outdoor courtyards; and roomy common areas. The rehab unit also has its own outside entrance for visitors.

There are many benefits associated with consolidating the two distinct neighborhoods, such as decreasing staff duplication. In addition, residents and patients receive even more personalized care because the new area is more compact, which makes it easier for staff to maneuver, according to Tami Hoversten, Village Care Center administrator.

"Our staff, whether they are in dining, housekeeping, maintenance or nursing, is much more efficient as they go about their daily tasks, which gives them more opportunities to spend time and build bonds with our residents and each other," Hoveststen said.

LOOKING FORWARD

Parkinson's Treatment and Services

John Knox Village is addressing a gap in treatments and services for people with Parkinson's Disease in Eastern Jackson County. Initially, the Village introduced specialized therapies, LSVT BIG® and LSVT LOUD®, through Village Outpatient Therapy. Because of the program's success, the Village plans to expand the outpatient therapy clinic and continue to add Parkinson's services.

By the end of fiscal year 2025, John Knox Village aims to establish a center that offers treatment and services for those with Parkinson's Disease. It will feature:

- Expanded outpatient therapy options;
- Enriched fitness programs, including Parkinson's-specific classes like Rock Steady Boxing;
- Enhanced educational opportunities for residents, associates and members of the surrounding community; and
- Strengthened collaborations with local and national Parkinson's experts.



Village Hospice Seeks to Expand

With its Level 5 status from We Honor Veterans, Village Hospice continues its efforts to serve veterans and underserved communities throughout western Missouri. Assisted by new marketing strategies, the hospice agency is working to expand its services in the greater Kansas City market and is in the process of procuring a license to operate in Kansas.

TECHNOLOGY

John Knox Village's technology department, Information Technology (IT), unveiled a variety of projects that are helping both associates and residents more successfully navigate daily tasks.

For example, IT supported the Village's investment in upgrading the network hardware by replacing outdated equipment and increasing network bandwidth and availability for all users. The department also assisted Village Home Health and Village Hospice in rolling out new electronic medical record software from AXXESS Systems. Both agencies began experiencing greater operating efficiency shortly after the system's full implementation.

"Because the software assists with everyday tasks such as charting and reimbursement, we've been able to adapt new processes and orient staff more quickly," said Anthony Columbatto, vice president of health and community services.

In addition, the IT staff has been working on other technological projects that enhance efficiency, such as launching a desktop dashboard that provides Village leaders with real-time access to department finances. They also implemented scheduling software to help the salons better manage their business and potentially increase revenue and are searching for a replacement for the current point of sale system.

IT also is contributing to resident safety across the continuum of care. At Village Assisted Living, they are supporting testing of the SafelyYou fall prevention technology. In addition, the department is supporting the Village as it invests in upgrades to the independent living resident safety system. Finally, they rolled out a resident subscription service called Candoo. The service provides in-home and remote tech support and training specifically designed to help older adults remain connected through technology.

Barbie Movie Screening



Super Bowl Party - Go Chiefs!



Lei'd Back Luau



Golf Clinic with MCC-Longview



Theatre Group



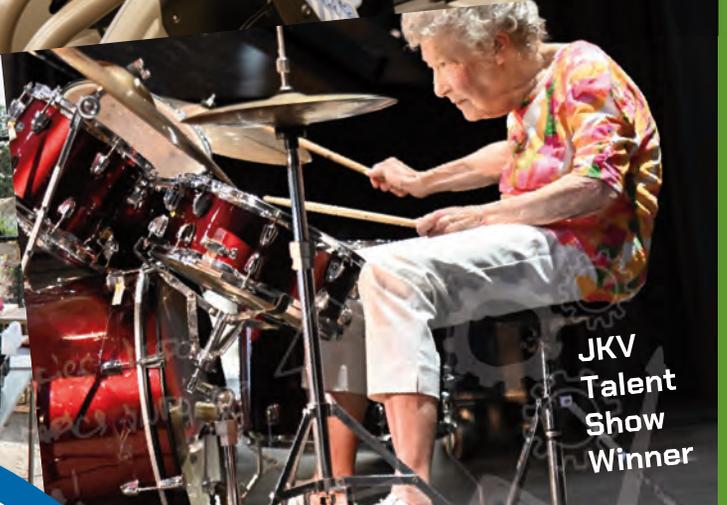
Fitness Center Challenges



Gardeners Association



JKV Talent Show Winner



John Knox Village also made a commitment to **Elevate** the resident experience via its life enrichment activities. Staff, with input from residents, focused on offering a greater variety of fitness classes, wellness education, intergenerational/educational opportunities, lifelong learning classes and more. With an eye on being good stewards of the Village's finances, Village associates recruited passionate volunteers to assist with bringing quality and beneficial on-campus life enrichment programs to Village residents.

Innovate

SERVICE and CARE

John Knox Village's innovative approach to enhancing the well-being of residents, patients and members of the surrounding community is redefining health care services in Lee's Summit, Kansas City and beyond.

Village Assisted Living Celebrates Multiple Years of DEFICIENCY-FREE ANNUAL SURVEYS

Village Assisted Living and Memory Care continues its streak of deficiency-free state surveys, passing this year's state inspection with zero deficiencies, marking a remarkable six consecutive years of achieving this distinction!

A zero-deficiency rating is the gold standard. Conducted by the Missouri Department of Health & Senior Services, the surveys are rigorous and comprehensive with inspectors evaluating all aspects of assisted living. Surveyors arrive unannounced and spend several days observing care procedures and interactions between staff and residents. They also conduct interviews with residents, families and staff.



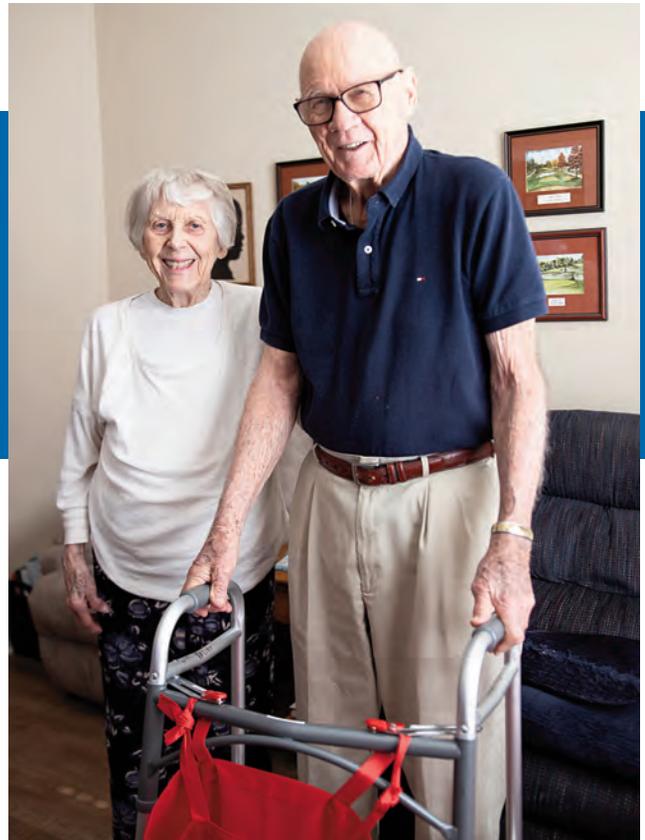
VILLAGE ASSISTED LIVING MEMORY CARE EXPANSION

Village Assisted Living (VAL) recently expanded its memory care service with the conversion of assisted living apartments into memory care apartments.

Throughout fiscal year 2024, VAL worked to incorporate a total of 14 assisted living apartments into the Memory Care 2 unit. VAL started with eight apartments, which quickly sold out, and added six more once the first section stabilized, said Melanie Heydon, marketing coordinator for Village Assisted Living.

"Village Assisted Living was one of the first assisted living facilities in the state of Missouri to offer memory care services and has become well known for our 'person-centered care,'" Heydon said. "Since then, we consistently have a waiting list for apartments. Creating new homes enables us to help our residents and their families and it was just the right thing to do."

Village Assisted Living Memory Care apartments are about 450-square feet and include a kitchenette and private bathroom.



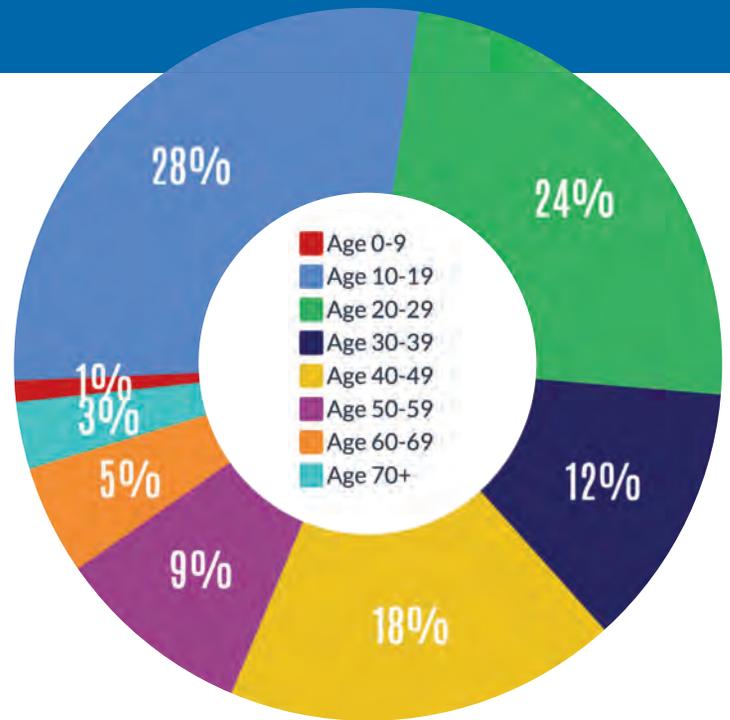
Fall-Detection Technology Pilot Program PRODUCING EXCITING RESULTS

Village Assisted Living has completed its trial of a new fall-detection and prevention technology called SafelyYou. Marie Winter-Calvillo, administrator, said it was a huge success in detecting and addressing falls quickly, and reducing unnecessary trips to the emergency room. The 65-day pilot, which included a sampling of rooms in assisted living and assisted living memory care, resulted in a 62% reduction in undetected falls.

BEHAVIORAL HEALTH VAN TRANSPORTATION SERVICE

AGES OF PATIENTS SERVED

2023 Demographics



A little after a year since it started offering transportation services to the Greater Kansas City Area (and sometimes beyond), the Behavioral Health Van Transportation Service is exceeding expectations.

The service, which is novel to the Kansas City area, helps people having a mental health crisis receive more timely care while concurrently freeing up emergency room beds and ambulances. It is successful because of the partnerships formed between the Village and 12 metro-area health care facilities in multiple health care systems. The newest partnership is with Lee's Summit Medical Center, which started in late FY24.

"We are working with organizations in both Missouri and Kansas and getting busier and busier as hospitals become more acquainted with what we offer and comfortable connecting their patients with our service," said Brian Opoka, director of public safety.

The service's success can be attributed to a proven record and strong relationships within Kansas City's health care community. From January to early April 2023, the service transported 308 patients. During the same period in 2024, it assisted 515 patients.

"For the most part, we are taking people to specialty facilities so they can get the help they need faster when they need it the most," Opoka said.

The service also frees up ambulances, enabling them to handle emergency medical and trauma calls rather than the non-emergent patient transfers.

... "WE ARE TAKING PEOPLE TO SPECIALTY FACILITIES SO THEY CAN GET THE HELP THEY NEED FASTER WHEN THEY NEED IT MOST."

Brian Opoka, director of public safety



Award-Winning Service

LeadingAge Missouri named the JKV Behavioral Health Van Transportation Service the winner of its 2023 Excellence in Service Award.

"THE 18 YEARS I'VE BEEN LIVING AT JOHN KNOX VILLAGE HAVE BEEN IDEAL. OUR ACTIVITIES HERE IN ALL AREAS OF LIFE HAVE DEFINITELY ADDED TO MY 98 YEARS OF ENJOYABLE LONGEVITY."

Virginia Levin, John Knox Village Resident

John Knox Village residents came together to display the words frequently used in the recent resident satisfaction survey to describe the care and services the Village provides.



Innovate

ON-CAMPUS HEALTH CLINIC

John Knox Village residents have a new, on-campus health and wellness care option with the opening of a walk-in clinic by Curana Health.

Conveniently located at the Villager Inn, the clinic offers a variety of services, such as wellness visits, primary care services, preventative care, annual physicals, minor wound care, chronic care management and a monthly podiatrist clinic.

Blood pressure checks and minor wound care services are free for Village residents. Curana bills additional services to most major insurances. A nurse practitioner, who is overseen by Kate Twenter, DO, provides care to Village residents and members of the surrounding community. Dr. Twenter, the Village's long-time medical director, also is a member of Curana Health Group.

"Curana has been providing senior-focused health care for many years in clinics located throughout the nation, and we believe our strong relationship with them will enable residents to more easily maintain their good health as well as address small problems before they become big problems," said Anthony Columbatto, vice president of health and community services.

Between September 2023 and March 2024 (the end of the fiscal year), the Curana Clinic had 1,512 patient encounters.



Dr. Twenter



Easy Access to Quality Health Care

The Curana Clinic is located in the former bank space at the Villager Inn and can easily be reached by the Village's on-campus transportation service, Dial-A-Ride.

For many years, the Village offered its own on-campus Resident Wellness Clinic. However, it offered limited hours of operation and fewer services.

"Residents now have greater access to quality health and wellness care and Village staff has been able to shift their focus to providing home health services," Columbatto said. "We've created a win-win-win situation with the Curana partnership."



"OUR RESIDENTS DIRECTLY BENEFIT FROM HAVING A PLETHORA OF HEALTH AND WELLNESS CARE RIGHT HERE ON OUR CAMPUS AND, IN TURN, ARE EMPOWERED TO LEAD HEALTHIER AND MORE BALANCED LIVES."

Anthony Columbatto, Vice President of Health and Community Services



Relate

TO ENHANCE A POSITIVE CULTURE

John Knox Village is more than a lovely campus with beautiful buildings – it is a community of people built on positive relationships that are cultivated daily for continued success.

John Knox Village Celebrates A DECADE OF P.R.I.D.E.

In 2014, John Knox Village unveiled its plans to “Redefine the Village Experience,” a multi-faced initiative that consisted of strategies to redevelop the campus and transform the Village’s culture.

“Beautiful buildings are great, but we knew that what happens inside the buildings is more important than the physical structures. We pledged to create a culture that would build community,” said Dan Rexroth, Village president and CEO.

To kickstart their efforts, Village leaders consulted with a company with a track record of helping organizations with cultural transformations. The Village created a committee of associates from across the organization to steer and offer advice, a group that is still going strong today. The grassroots effort incorporated the tenets of hospitality and customer service that is now known as “service excellence” punctuated by P.R.I.D.E. – Personal Responsibility In Delivering Excellence.

From the beginning, the Village worked to fully incorporate service excellence into every aspect of daily life, including



Associates show their P.R.I.D.E. with themed T-shirts.



job descriptions, interviewing, orientation, training, performance evaluations and, most importantly, celebrations. P.R.I.D.E. cards written by residents and associates commemorate daily interactions of times when someone exhibited Personal Responsibility In Delivering Excellence.

According to results from the last two all-associate engagement surveys, 100% of associates are aware of and understand P.R.I.D.E. What’s more, overall associate satisfaction is up, as is overall resident engagement. Finally, associate turnover is decreasing year over year and resident satisfaction is increasing.

“During the last 10 years, service excellence and P.R.I.D.E. have had a significant, positive impact on our community,” Rexroth said. “Today, our culture is stronger than ever, and we plan to keep the ball rolling well into the future.”

Associate Recognized for 45 YEARS OF SERVICE

In the 45 years since he first stepped foot on campus, Greg Maxon, renovations supervisor, has made measurable differences in the lives of the thousands of residents and associates he has served through the years.

“Greg is always thinking of others and always remembers birthday cards or gifts to celebrate special days – he is so thoughtful that he’d do something

every day of the week for folks if he could, and he never expects anything in return,” said Jeff Hobbs, manager of renovations. “He enjoys making people happy, and at the end of the day, he cares about the residents and the people who work around him.”

Maxon started working in the dietary kitchen of the original Village Care Center in 1978, where he worked for six years. In 1984, Maxon transferred to maintenance/operations and has held a variety of roles throughout the years. Today, Maxon is the renovations supervisor. He oversees a team of five associates who work on campus renovation projects.

“JKV has always been a great fit for me – it’s close to home, there are great residents and employees, and I appreciate all the relationships I have with both.” Maxon said. “It truly is my second family.”





Members of the service excellence committee display the nine characteristics of P.R.I.D.E., which have been a cornerstone of the Village's positive culture for a decade.

BUILDING COMMUNITY WITH P.R.I.D.E.

John Knox Village associates exhibit Personal Responsibility in Delivering Excellence with every interaction. The culture of service excellence makes a difference for associates and in their interactions with residents.

Relate

SURVEY RESULTS HIGHLIGHT SUCCESSES AND OPPORTUNITIES

Each year, John Knox Village asks associates to voluntarily complete an all-associate engagement survey. The statistics collected help direct the Village with its community-building initiatives, an effort that makes a positive difference in the lives of all members of the Village community. In fiscal year 2024, 80.3% of eligible associates completed the 30-question survey. The questions about relationships merited the highest scores.

"Happy and engaged associates create happy residents, and the survey answers provide us with a roadmap that helps us focus on the areas that will make the associate experience even better, and in turn, our residents even happier," said Laurie Johnson, vice president of human resources. "We are so thankful for the time and information our associates shared with us."

The survey confirms that associates **embrace service excellence** and **understand the expectations of P.R.I.D.E.** – an astounding 100% of respondents answered "yes" to this question.

Associates also revealed that there is a **real camaraderie** between individuals – with 99% of respondents affirming their **loyalty to their immediate team or work group** and 95% of respondents indicating there is good teamwork with co-workers.

SURVEY SAYS ...

Associates participated in the 30-question engagement survey in December 2023.

- 100% of respondents embrace Service Excellence and understand the expectations of P.R.I.D.E.
- 99% affirm their loyalty to their immediate team or work group
- 98% are passionate about the work they do
- 97% often leave feeling good about their work
- 95% indicate there is good team work among the people with which they work.
- 93% have a strong relationship with their immediate supervisors.

What's more, 93% indicated they have a strong relationship with their immediate supervisors.

Associates also affirmed they **feel comfortable and safe** in their work environment – 98%; and 97% responded they **often leave feeling good about their work.**

Finally, 97% of respondents feel as if they are **making a difference** and 98% **are passionate about the work they do.**

Associates also provided ideas via the survey's comments section that has spurred change in the organization. For example, the Village has expanded its selection of associate benefits, such as adding pet insurance, based on feedback.

ENRICHING LIVES WITH PERSONALIZED CARE



With new software in place to help create greater operational efficiency for Village Home Health and Village Hospice, compassionate care for many residents and members of the surrounding community navigating health challenges starts with support from Resident Care Coordinator Melanie McGraw.

A licensed social worker, McGraw brings a personal touch to community health services, working with individuals to help them get the care and resources they need, including palliative care.

For example, McGraw worked with a spouse struggling to care for their partner. She organized at-home physician visits, arranged counseling sessions and coordinated assistance from Village Helpers.

"I connect them to resources that will help them continue living independently for as long as they can in a healthy supportive environment," she said. "Long-term planning is crucial so they can make informed decisions about their future."

Collaboration is key in McGraw's work. She works closely with area managers, admissions teams, nurse managers and public safety associates to identify those in need of specialized resources.

"People want to stay in their homes longer," McGraw said. "They want their services brought to them, and today, more services are available than ever before to help meet that need."

JKV RECRUITERS *are Village Ambassadors*

In recent years, John Knox Village Human Resources recruiters have been pounding the pavement to find great candidates for open positions by attending recruitment events around the Kansas City area – and sometimes beyond.

“These events are an incredibly important part of our job,” said Kristin Harris, recruiter. **“The recruiters travel far and wide, not only all over the Greater Kansas City Metro, but up to two hours away.”**

In addition to attending employment events and job fairs, recruiters also serve in an educational capacity by going to schools and community groups to assist with mock interview practice, resume writing, skill building and career exploration. They even visit area grade schools and middle schools to talk to the kids about careers working with older adults.

Recruiters attended about 60 events during fiscal year 2024, a number that will increase during FY25 (April 1, 2024, to March 31, 2025).



John Knox
Village



“EVERYONE HERE IS SO FRIENDLY AND HELPFUL. I’M SO GLAD I’M HERE.”

Sarah Short,
John Knox Village Resident





Football Spirit Day

2023 John Knox Village Gala



2023 Holiday Appreciation



All-Associate Picnic



All-Associate Picnic



Ice Cream Day



Associate Appreciation Reception



All-Associate Picnic

“SERVING WITH P.R.I.D.E. MEANS TREATING OUR RESIDENTS WITH COMPASSION AND INTEGRITY AND FOLLOWING THROUGH. I TELL NEW HIRES THEY DO NOT WORK FOR ME BUT FOR OUR RESIDENTS AND TO SHOW THEM RESPECT AND KINDNESS AS WELL AS THEIR CO-WORKERS.”

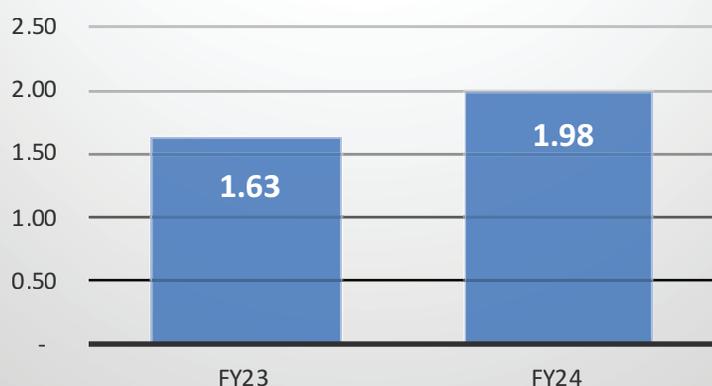
Robin Benge, Village Care Center Housekeeping Supervisor, 35 years of service at John Knox Village



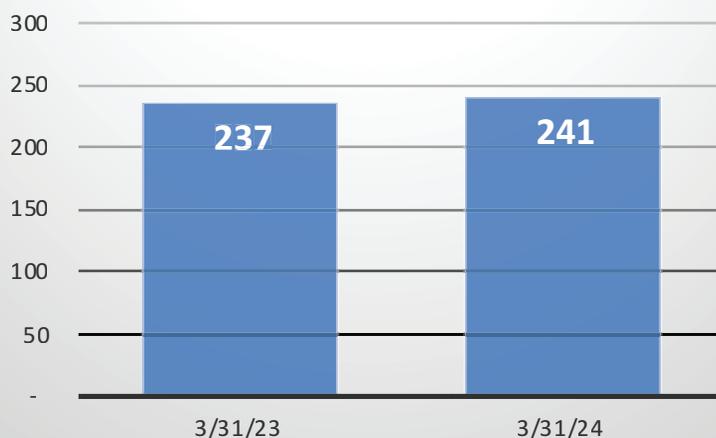
Financials

John Knox Village is working to Elevate, Innovate and Relate to ensure financial stability today and far into the future.

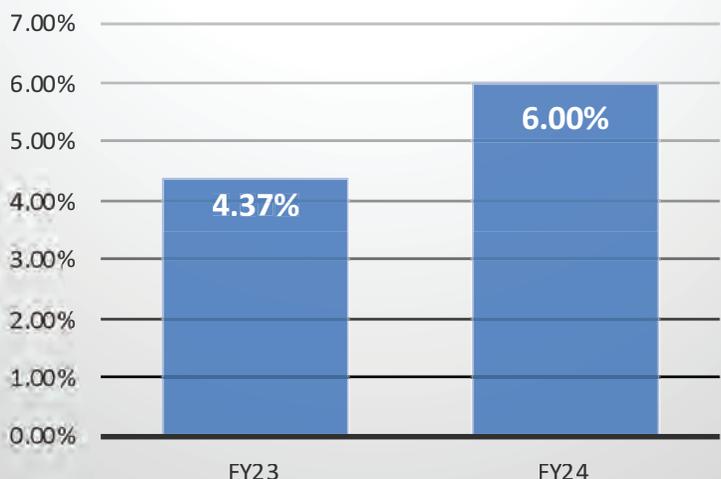
JKV Debt Service Coverage Ratio



JKV Days Cash on Hand



JKV Net Operating Margin



JKV Financial Report Balance Sheets - As of March 31, 2024 and 2023

| (in 000s) | FY24 | FY23 |
|---|------------------|------------------|
| Cash and Cash Equivalents | \$5,872 | \$6,496 |
| Accounts Receivable | \$4,665 | \$5,141 |
| Other Current Assets | \$9,340 | \$8,337 |
| Total Current Assets | \$19,877 | \$19,974 |
| Investments and Reserves | \$67,060 | \$62,453 |
| Net Fixed Assets | \$127,896 | \$128,110 |
| Other Long-term Assets | \$2,575 | \$2,136 |
| Total Assets | \$197,531 | \$192,698 |
| Long-term Debt | \$125,074 | \$127,384 |
| Other Liabilities and Net Assets | \$72,457 | \$65,315 |
| Total Liabilities and Net Assets | \$197,531 | \$192,698 |

Statements of Operations Years Ended March 31, 2024 and 2023

| (in 000s) | FY24 | FY23 |
|--|------------------|-------------------|
| Operating Revenues | \$75,656 | \$66,791 |
| Operating Expenses | \$68,031 | \$62,485 |
| Operating Income | \$7,625 | \$4,306 |
| Investment Income | \$1,097 | \$1,474 |
| Other Investment Income and Grant Revenue | \$3,932 | \$(2,853) |
| Interest Expense | \$6,315 | \$5,842 |
| Depreciation Expense | \$10,955 | \$10,958 |
| Change in Unrestricted Net Assets | \$(4,616) | \$(13,873) |
| Transfers from Affiliates and Capital Contribution | \$98 | \$56 |
| Change in Net Assets | \$(4,518) | \$(13,817) |

JKV Foundation Financial Report Balance Sheets - As of March 31, 2024 and 2023

| (in 000s) | FY24 | FY23 |
|--|----------------|----------------|
| Cash and Current Assets | \$1,080 | - |
| Investments | \$3,871 | \$3,867 |
| Charitable Gift Annuities and Trust | \$168 | \$157 |
| Total Assets | \$5,119 | \$4,024 |
| Due to JKV | \$224 | \$269 |
| Payment Due on Annuities and Trust | \$66 | \$69 |
| Total Liabilities | \$290 | \$337 |
| Unrestricted Net Assets | \$936 | \$751 |
| Restricted Net Assets | \$3,893 | \$2,936 |
| Total Unrestricted and Restricted Net Assets | \$4,829 | \$3,686 |
| Total Liabilities, Unrestricted Net Assets, and Restricted Assets | \$5,119 | \$4,024 |



John Knox Village Foundation

The John Knox Village Foundation takes pride in selecting projects and initiatives that achieve the goals of Elevating, Innovating and Relating as it aids the Village in fulfilling its mission of "Enriching lives, building community."



2023 John Knox Village Gala A FAIRYTALE ENDING!

What an evening. Nearly 600 members of the John Knox Village community gathered at The Pavilion for "A Storybook Gala . . . where you are never too old for a fairy tale!"

Thanks to multiple sponsors, including presenting sponsor Curana Health Clinic, esteemed guests, staff and volunteers, the 2023 John Knox Village Gala was a smashing success. The Foundation raised a record-breaking \$270,000, which will be used to expand Village Outpatient Therapy and enhance the Village's Parkinson's treatment programs.

In addition to the popular wine & bourbon pull, attendees participated in live and silent auctions, entered prize drawings and played fun games to support the cause.

"We are truly humbled by the outpouring of support friends of the Village generated for this year's gala," said Gail Benne, JKV Foundation president. "We are so excited about how the funds we raised will make a positive difference in the lives of so many of our friends and neighbors – both on our campus and in the surrounding community – who need the services and support offered by Village Outpatient Therapy and the Village's Parkinson's programing."

Innovate

John Knox Village is Taking Steps to Expand Parkinson's Care

In only a few short years, Village Outpatient Therapy has evolved into a thriving therapy clinic for assisted living and independent living residents as well as members of the surrounding community.

With the increase in the number of patients served, plus the addition of LSVT BIG® and LSVT LOUD® therapies for Parkinson's disease, clinic space was getting tight, so the Village put together a plan to expand the clinic in its current location with assistance from funds raised at the 2023 John Knox Village Gala. However, in the months since the September gala, new opportunities helped the Village grow the Parkinson's program into a Village-wide health and wellness initiative that includes Village Home Health, Village Palliative Care, the fitness centers, life enrichment and more.

With this expansion, it quickly became evident that Village Outpatient Therapy needed a new clinic that



SCAN TO WATCH VIDEO

offered even more space. After examining several locations, the Village Care Center's unused 400 unit was selected to be converted into a new clinic, including a gym and private treatment rooms, that will open in fiscal year 2025.

"By bringing together Village Outpatient Therapy – a full-service senior-focused center for physical, occupational and speech therapy – and a separate wellness space for Parkinson's-focused exercise classes, education and support, we are creating something that exists nowhere else in Eastern Jackson County," said Anthony Columbatto, vice president of community health services.

Elevate

New Dog Park Coming Soon Thanks to Generous Donors



John Knox Village will soon be among the handful of senior living communities that provide a dedicated common area for its residents and their furry friends.

An anonymous donation to the John Knox Village Foundation in late fiscal year 2024 provided seed money to start the campaign to raise \$125,000 to build a dog park.

"We always knew we had a lot of dog lovers who live and work on our campus, and we are beyond excited about the support we've received for the Barks and Rec Campaign," said Gail Benne, president, JKV Foundation. "We have met our fundraising goal thanks to the generosity of Village residents and associates and can't wait for the ribbon cutting for this new resident amenity."

The grassy area just west of The Pavilion is being transformed into an area where resident dogs can be off leash. Plans include separate areas for small and large dogs, water fountains for dogs and their humans, and several benches for residents to use while their canine companions play.

EMS Building Project AWARDED GRANT



The largest capital campaign the John Knox Village Foundation has overseen in its 40 years of supporting the Village is inching toward its goal.

The Community Lifeline campaign recently received a \$500,000 grant from the "Victor E. Speas Foundation, Bank of America, N.A., Trustee". The funds will be added to the money already raised via past galas and other grants and gifts to create a new headquarters for the Village's emergency medical services department. The Foundation continues its work to submit grant requests to community partners to raise the funds needed to start construction.

"We are so appreciative for this grant as it gets us one step closer to raising the funds needed to create a larger and more comfortable space for our EMS department," said Gail Benne, president, John Knox Village Foundation.

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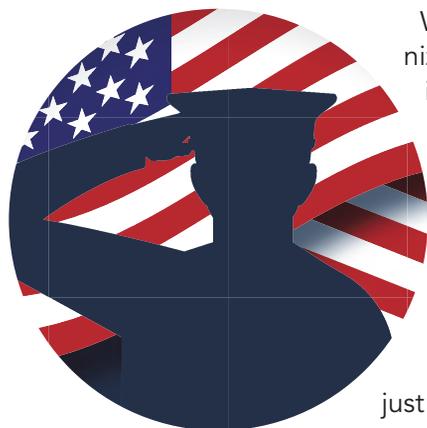
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Relate

Construction of Veterans Memorial Will Bring Generations Together



Wanting a permanent location to honor and recognize members of the Village community who were in the United States armed forces, the John Knox Village Veterans Group, assisted by the Foundation, set out to raise money to construct an on-campus memorial.

Less than a year after announcing the project, the group exceeded its goal of raising \$60,000 to build the permanent monument in honor of area veterans.

The Veterans Military Memorial will be located just south of The Pavilion. It will consist of six marble monuments representing the different branches of service.

Flags for each branch will be installed next to the corresponding obelisk. A larger monument will be installed to denote the memorial and recognize each military conflict. Flagpoles for a POW-MIA flag and the Missouri state flag will be erected. The site will be used as a place of remembrance and ceremonies. Construction will occur during fiscal year 2025.

"Veterans from every branch of the military who have served during times of peace and conflict have called the Village home," said Maria Timberlake, vice president of senior living. **"This memorial provides a connection from the present to the past and will enable members of the Village community to remember and honor those who have served and sacrificed for years to come."**

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John Knox Village

Mission

To enrich the lives of older adults through community living,
"Enriching lives, building community"

Vision

To be the leader among senior living communities
in the Greater Kansas City area

Values

- We value older adults and their importance to our society.
- We foster an environment that nourishes supportive, trusting and caring relationships with our residents, their families and our associates.
 - We promote a community that encourages meaningful involvement and personal fulfillment.
- We emphasize an open community that welcomes and celebrates diversity in all its aspects.
 - We value business practices that promote careful stewardship of resources – human, physical and financial.
- We encourage active involvement in the local communities in which we operate.

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