

# ENVISIONING

## A Lifetime of Longevity

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THE JOURNEY 2025

# The Journey 2025



**Frances Salinas**  
President & CEO



**David Schmitt**  
Board Chair

Fiscal Year 2025 was a time of tremendous achievement for our communities. We advanced our mission in several ways and strategically positioned ourselves to be leaders in the aging space for years to come.

Our most notable achievement was welcoming Highview in the Woodlands into our family of communities. Highview has provided Assisted Living and Memory Care services to seniors in our region for over 100 years. We admired the hardworking team there and recognized the opportunity to enhance the services and programs they offered to their residents. The work our team has done to renovate that community in less than a year has been nothing short of extraordinary.

We also saw exciting growth at our Wesley Willows campus, where Willows Health and Rehab Center had a banner year. The revenue from our Medicare unit jumped from \$900,000 in FY24 to nearly \$2.5 million in FY25. This dramatic increase is no accident. It happened because of a concerted effort to increase the exceptional staff and services in the Medicare unit. Our incredible team served three times as many residents and community members as the previous year.

At Peterson Meadows, we celebrated the successful completion of 19 new duplex homes on Meadows Court. The homes at Peterson Meadows are now 100% occupied with a

waitlist of people who are eager to be part of this tight-knit, active, and independent senior living community.

While it is exciting to have so many new residents and so many more eager to join our communities, we also understand that with great growth comes great responsibility. We have talked to many of the incoming residents and the overwhelming desire we hear repeatedly expressed is the desire to age in place.

Our desire is for Wesley Willows, Peterson Meadows, and Highview in the Woodlands to be communities in which all residents enjoy access to everything they need for a lifetime of joyful and healthy living. While this may sound like a lofty goal, we firmly believe we can achieve it in the coming years.

Recently, we convened our Leadership Team to create a strategic plan for achieving this vision. The plan we came up with is a three-pronged approach to making holistic care available in our communities—care that nourishes the mind, body, spirit, and soul of each resident. You can view an overview of the strategic plan in this report.

Too many people still assume senior living communities can be nothing more than institutionalized nursing homes. We know better at Wesley Willows, Peterson Meadows, and Highview in the Woodlands. Our communities are spaces for equipping seniors to celebrate life, both now and for a lifetime. We are convinced that as we follow our strategic plan, more people both in the Northern Illinois region and beyond will realize this extraordinary truth!



## VISION 2030:

# STRATEGIC PLAN

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**VISION STATEMENT:** We inspire the well-being and life journey of those who live and work in our communities.



### **FOSTER WHOLE-PERSON WELLNESS** THROUGH INTEGRATED & BRAIN HEALTH STRATEGIES

1. Cultivate a Culture of Well-Being
2. Develop an Integrated Healthcare System
3. Establish a Cognitive Wellness Brand



### **EXPAND SERVICE REACH** AND MARKET PRESENCE

1. Target New Geographic and Demographic Markets
2. Expand Programs and Services into Middle-Income Markets
3. Evaluate Potential Opportunities for Growth



### **TRANSFORM CAMPUS INFRASTRUCTURE** & TECHNOLOGY TO SUPPORT A SMART, SUSTAINABLE FUTURE

1. Develop a Comprehensive Master Plan for  
Infrastructure and Facilities
2. Enhance Technology and Create Smart Campuses



# Accomplishments

- Affiliated with Highview in the Woodlands to add another product offering to the Wesley Willows family.
- Increased Medicare rehab revenue by \$1.5 million due to measurable progress in operational performance.
- Provided \$23,000 in tuition reimbursement to staff members for continuing education.
- Increased Memory Wellness Center program census and staff to provide services three days a week.
- Received \$161,500 for the Good Samaritan Fund from forty-nine businesses through the Corporate Partnership Program.
- Formalized new partnerships with Saint Anthony College of Nursing and Rockford Public School District 205.
- Enhanced the Dining Services experience by bringing leadership staff in-house to increase our ability for flexible buying and cooking.



## Mission Statement

We promote active, secure lifestyles for seniors through ongoing, personalized care.



## Vision Statement

We inspire the well-being and life journey of those who live and work in our communities.

## Core Values

### Integrity

We always do the right thing for our residents and employees, staying true to our mission.

### Relationships

We build a caring community through respect, compassion, and meaningful connections with each other.

### Excellence

We hold ourselves to a high standard of performance, always striving to be best-in-class.

### Fiscal Responsibility

We use resources wisely, and are fully transparent about our finances.

### Safety and Security

We prioritize the well-being of all members of the Wesley Willows family.

### Accountability

We own our actions and responsibilities; we honor our commitment to others.

# Continuing a Legacy of Care

## Highview in the Woodlands Joins the Wesley Willows Family



For over a century, families have enjoyed peace of mind knowing their aging loved ones are well cared for at Highview in the Woodlands. The team at Wesley Willows had long admired Highview for its similar mission and care philosophy. However, it had become apparent in recent years that Highview needed help to continue fulfilling its mission.

The Wesley Willows Corporation affiliated with Highview in the Woodlands in October 2024 to expand the exceptional programs and services it offered to seniors. Highview was especially appealing to Wesley Willows because it provided an alternative product as a standalone community of 36 Assisted Living and 26 Memory Care private apartments.

The Wesley Willows team immediately began helping the team at Highview to enhance the services, programs, and amenities offered to its residents.

Over the next eight months, the team replaced 10,000 square feet of flooring and applied 400 gallons of paint throughout the campus. They also made substantial improvements to the HVAC and refrigeration systems and performed a complete overhaul of the internal computer network. Wesley Willows also helped the Highview community fill several crucial staff roles.

Longtime Highview employee Anne Roe is impressed with the community transformation she's witnessed since October. "I feel like we're more efficient than we've ever been at helping

residents," she says. "Wesley Willows has given us the support and resources we need to give residents the specialized care they need right away."

The new Highview has also already attracted several new residents, including Mary Kessler. Mary cites the professionalism of the staff as a central reason for her coming here: "The staff here is fabulous. They're professionals from start to finish.... There's not one thing that made me wonder if I made the wrong decision."

Highview in the Woodlands hosted a ribbon cutting ceremony organized by the Stateline Chamber of Commerce on July 2, 2025, to commemorate the completion of the campus renovations. Wesley Willows President and CEO Frances Salinas did the honors of cutting the ribbon alongside Rockton Mayor John Peterson, Highview Director Katie Kinson, and members of the Wesley Willows leadership team. Several members of the local community and partner organizations were also in attendance.

In an interview with local news after the ceremony, Director Katie Kinson perfectly summed up the significance of the occasion: "This has been a labor of love the last eight months. We have done renovations inside and outside, and the residents, family members, and staff have been so appreciative. It looks great, but we're also providing the exceptional care inside, which is our most important piece."



# By The Numbers

## Condensed Combined Financial Summary

Year ended June 30, 2025

### Financial Position

|                              |                       |
|------------------------------|-----------------------|
| Cash and Equivalents         | \$ 2,421,053          |
| Receivables and Other Assets | \$ 3,402,525          |
| Investments                  | \$ 60,845,592         |
| Property and Equipment, Net  | \$ 120,143,423        |
| <b>Total Assets</b>          | <b>\$ 186,812,593</b> |

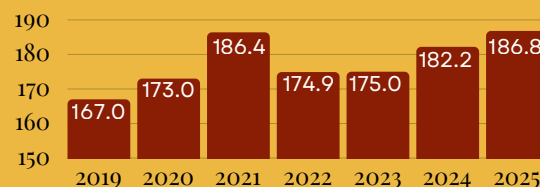
|                               |               |
|-------------------------------|---------------|
| Accounts Payable              | \$ 1,461,996  |
| Accrued and Other Liabilities | \$ 3,175,768  |
| Bonds Payable, Net            | \$ 32,351,927 |
| Refundable Entrance Fees      | \$ 50,848,447 |
| Deferred Revenue              | \$ 32,001,425 |

|   |                       |
|---|-----------------------|
| <b>Net Assets</b>                       | <b>\$ 66,973,030</b>  |
| <b>Total Liabilities and Net Assets</b> | <b>\$ 186,812,593</b> |

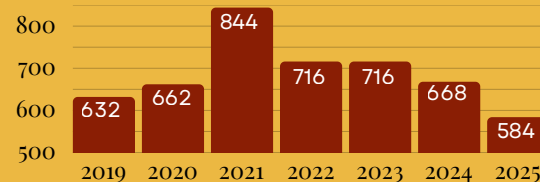
### Financial Results

|                                     |                     |
|-------------------------------------|---------------------|
| Revenues                            | \$ 40,182,977       |
| Operating Expenses                  | \$ (43,065,775)     |
| Investment Earnings                 | \$ 6,946,986        |
| Contributions                       | \$ 2,238,346        |
| Interest Expense                    | \$ (1,593,325)      |
| <b>Excess Revenue Over Expenses</b> | <b>\$ 4,709,209</b> |

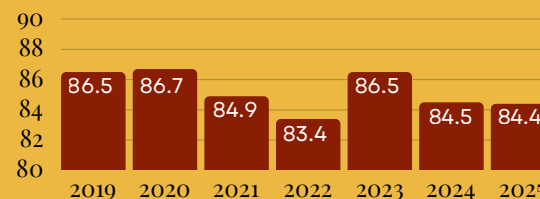
Total Assets (\$ millions)



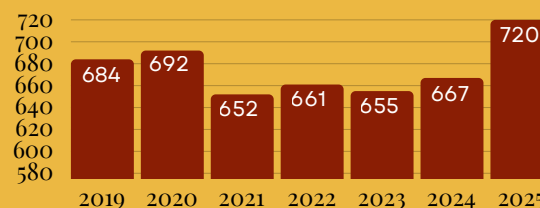
Days Cash on Hand



Total Occupancy %



Total Occupied Units at 6/30



Resident Services Revenue (\$ millions)



## 2025 Report Card

| Subject                                 | Goal          | Actual        | Achieved |
|---|---------------|---------------|----------|
| Overall Occupancy                       | 87.1%         | 84.4%         | No       |
| Increase in Unrestricted Net Assets     | \$ 2,750,000  | \$ 4,727,709  | Yes      |
| Good Samaritan Endowment Fund           | \$ 16,597,774 | \$ 18,518,959 | Yes      |
| Provided Appropriate Charitable Support | \$ 1,015,000  | \$ 1,045,480  | Yes      |
| Total Gifts Received                    | \$ 850,000    | \$ 2,256,846  | Yes      |
| Board Member Attendance                 | \$ 80%        | \$ 89%        | Yes      |

# A Lifetime of Care for a Lifelong Servant

## Spotlight on 31-Year Resident Gene Skoglund



It is a beautiful privilege to serve residents who have spent their lives serving others. For over 31 years, the staff at Wesley Willows have had the pleasure of caring for resident Gene Skoglund. All it takes is to hear Gene's life story to understand what an honor it is to serve him.

Gene was drafted into the army out of high school and faithfully served overseas. When he returned to the U.S., he went to college, got married, and took a teaching job. He later worked at a foundry for 39 years. When he wasn't working, he was volunteering. He taught kids to play tennis at the YMCA, helped troubled youth at the juvenile court, and discharged patients at Swedish American Hospital for 26 years.

Gene's heart for helping didn't diminish when he came to Wesley Willows. He volunteered for many years at the on-campus card shop. With his help, the store earned thousands of dollars for resident programs and services provided by the Wesley Willows Auxiliary. Gene also used his time at Wesley Willows to paint thousands of cars for the toy ministry at Aldersgate

United Methodist Church of Rockford, which makes toys for children in hospitals, shelters, crisis nurseries, and foster care.

It is only fitting that such a caring man has experienced decades of care at Wesley Willows. He has lived in the same home since he moved to Wesley Willows and appreciates the convenient meal delivery and in-home care services he has received. When Gene could no longer take care of his wife Carolyn, she was able to receive assisted living and skilled nursing care in Willows Arbor and Hunt Terrace. Gene appreciated the ability to visit her on campus and the peace of mind, knowing she was well cared for until she passed away after 67 years of marriage.

When asked what he wants his legacy to be, Gene humbly downplays his accomplishments. He says he wants to be remembered as someone who enjoyed helping others and playing tennis. He adds that he has more admiration for the people who serve him every day than for himself. The staff at Wesley Willows could say the same thing about Gene.



## Celebrating Three Decades of Service

On March 26, 2025, the Wesley Willows family gathered to celebrate the retirement of one of our longest tenured employees: **Denise Good**. Denise served as an LPN on our Nursing Team for **over 37 years!** Thank you, Denise, for the countless lives you've touched over the years. Our residents and staff will miss you greatly! We wish you all the best in your retirement.



## Board of Trustees

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Board Chair

**Jack Croffoot**

**Joseph Garry**

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**Denise Popp**

**Dennis Roop**

**Frances Salinas**

**Joe Scandrol**

**Samuel Schmitz**

**Don Williams**

**Tammy Zurfluh**

# Thank You...

to all of our residents, friends,  
and partners for your generous  
giving in Fiscal Year 2025.

**Interested in Giving to Our 501(c)(3)  
Not-for-Profit Organization?**

Please use the QR code to learn more.



## Executive

### Leadership Team

**Frances Salinas**

President & CEO

**Annie Boltz**

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Operations

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**Jenny Frystak**

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