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## INTRODUCTION LETTER

#### Dear Partners,

It is with immense pleasure and pride that we present the Volunteers of America National Services (VOANS) Fiscal Year 2022 Impact Report. In this report, we collected a snapshot of our impressive results and heartfelt testimonies from people that we serve through our work in affordable housing, senior health care, social and resident services, and community development across 38 states, the District of Columbia and Puerto Rico.

The VOANS fiscal year is one to celebrate. VOANS served over 33,900 individuals and housed over 10,000 residents across 241 properties. We are proud to report that 91% of our residents engage with service coordinators to improve overall resident health and well-being. With a VOANS investment in staff training, over 2,100 classes were taken by the housing team to ensure quality customer service leading to 87% of our residents stating they would recommend our housing to a family or friend.

Throughout the industry, affordable housing production was challenging with rising interest rates, increased construction costs, disrupted supply chains and access to capital resources, but VOANS emerged as a top developer of affordable housing ranking #29 on the annual Affordable Housing Finance list with over \$250 million in development costs and just over 800 units under construction throughout the year.

As we reflect on the successful and inspiring year, we must say what an honor it is to lead the tremendously talented staff of over 2,600 individuals who show up to serve every single day. This special team earned certification as a *Great Place to Work* for the fourth Year. We realize that we do not do this work alone. Our work is only possible through our partnership with our industry partners and collaboration with our local Volunteers of America affiliates.

Thank you for helping us accomplish what we continue to do each year; we look forward to further work together as we join forces with our aligned missions, knowledge, advocacy and finances to take action for positive impact to produce high quality affordable housing, provide senior health care with excellence and strive for equitable communities.

We are capable of exceeding our greatest expectations when we work together.

Yours in Service,



Mike King
President & Chief Operating Officer



Kimberly Black King
Interim Chief Operating Officer
Chief of Real Estate Development





Volunteers of America National Services (VOANS), an affiliate of Volunteers of America, Inc., is a affordable housing developer and senior healthcare provider with operations nationwide and in Puerto Rico. VOANS has a long-established national presence as a quality provider of both housing and health care. The two business lines were merged to provide the financial and administrative strength needed to support these complex businesses in 1997. VOANS serves a wide variety of clients facing challenges due to income, age, physical or mental disability, with a special focus on seniors. The dramatic projected increase in the number of older adults in the United States who are living longer with fewer resources, coupled with the emergence of managed healthcare, has created a demand for providers that can efficiently and skillfully integrate affordable housing, healthcare and other supportive services. VOANS is one of the few organizations with a proven track record in both serviced enriched affordable housing and senior care, thus it is uniquely positioned to take advantage of the increasing opportunities to leverage strengths from each business line.

#### Over 33,968 served annually in 38 states and Puerto Rico

75% Senior

**20%** Family

5% Special needs (disabled, Veterans, etc)

#### Affordable housing owned and operated by VOANS

**241** Properties

**13,587** Units

#### 2677 Employees

**2440** employees in senior living/healthcare

**237** employees in housing development // residents services // operations

#### 169 properties utilize the service coordination model

These dedicated team members enable residents to live independently, longer in their homes, decrease hospitalization and nursing home admissions and improve residents' quality of life.

Out of 10,026 residents at the properties with service coordinators, 91% of the residents use the service coordinator program.

The program or Coordinators connect residents to benefit checkups, health and transportation services, meal programs, social activities, exercise and educational opportunities.

## WHO WE ARE



## Senior living and healthcare snaphot 5269 people served in 7 States

- 8 Home Health Agencies
- **3** Program of All-inclusive Care for the Elderly (PACE)
- 1 Meal Program
- Adult day services
- 1 Senior Behavioral Health Hospital
- **11** Skilled Nursing facilities
- **12** Assisted Living facilities
- 7 Independent Living facilities
- **10** Memory Care Units



#### **SENIOR LIVING**



"My wife had a stroke in mid-August. We were told to prepare for the worst. In mid-October, she came here to *The Preserve* and that is when our journey really began. The progression and rehab/recovery lifted her spirits. **She was determined to get better and return to her independence, as much as possible.** Our favorite CNA that comes to mind was Penny. Her diligence in working with my wife when she had no appetite was appreciated.

Tish the nurse and so many others really contributed to her success. Therapy.... WOW. Lisa in Speech Therapy worked on her enunciation and her mind. She worked on forming sentences, putting words together, and simply worked miracles.

The last 3 months she was here we both remembered every person. They all made an impact on us and they cared 100%. The staff truly didn't just see this as a job- it was a calling and a passion. It was an outpouring of love and belief in her abilities to get better that made all the difference. She had good days and bad days, but the understanding and response was just amazing. I can't say enough good things. The therapy group has been fantastic. In situations like this- people can come across caregivers they don't like, but that didn't happen to me here. Everyone was upbeat and wanting to work with her. The facilities and the amenities have been awesome. She looks forward to coming back here for outpatient therapy. She is beaming to see all her friends again.

Recently, on one of our most recent trips to outpatient therapy, the team had her in the Tollos lift system and surprised me with a dance to Elvis' I Can't Help Falling in Love. Elvis was her favorite since childhood and the smile in her eyes as she danced hand in hand with me spoke volumes. The dancing was above and beyond for both of us in our spiritual healing journey, beyond the physical therapy. This simple gesture of arranging this for us came from a place of love, not a job duty.

I have worked in the National Hockey League for over 50 years, and the therapy team here at *The Preserve* functions as smoothly as some of the Stanley cup teams I've been around for decades. The team work was on par with professional teams.

My wife's stay here at The Preserve couldn't have been any better".

- "Jiggs" McDonald

### I CAN'T HELP FALLING IN LOVE



Innovate...

Integrate...

Cultivate...

Elevate...

VOANS'
OVERARCHING GOAL
is to be a nationally
recognized leader in the
continuum and intersection of
housing and healthcare services
to lift up seniors, families, veterans
and others in need of service. Action
is at the core of the VOANS strategic plan.
This plan is designed to position VOANS as
an effective, nimble, creative agent of change
in an increasingly dynamic environment. The four
strategic elements are:

#### **Elevate Organizational Infrastructure**

Maintain a strong organization that supports improved integration of housing and health care expertise.

#### **Innovate in Housing and Health Care**

Implement quality cost effective programs to better serve communities.

#### **Cultivate Partnerships**

Grow VOANS reach and capacity by collaborating with others that bring financial means, thought leadership and opportunity.

#### **Integrate Well-being**

Promote all aspects of well-being for our clients, our team and the communities we serve.



VOANS STRATEGIC PLAN





### YEAR IN REVIEW



**Acquired 455 units** of family affordable housing in Puerto Rico.

The Oaks in Dallas, TX **closed on \$50M project** with 260 senior units.

**Awarded \$5M** from CDFI's FY21 Capital Magnet Fund allocation. This makes our 6th award, totaling over \$28M. To date, has supported the construction, acquisition or preservation of over 2,700 units of affordable housing.

**Top 50** 

List of Affordable Housing Finance #29

on the list of Top 50 Developers

#8

on the list of Top 50 Affordable Housing Owners

**Launched HOME**, Housing Operations Metrics of Excellence. Includes: New benchmarks to evaluate property management, Edge2Learn training platform for property management and maintenance and OneSite, property management software.

**Over 2100 classes taken** by housing team members on Edge2Learn platform so that everyone is more confident and skilled in property management. Training topics range from Accommodating Assistance Animals to Time Management to Leasing to Curb Appeal to Risk Management.

Process Improvement, Value and Optimization Team **(PIVOT) launched** its intake process for organizational process improvement project submissions. The team is actively working on and projected to facilitate 12 projects.

Kicked off implementation of **M-Files**, an organizational-wide document management solution for document creation, management, retention and destruction practices.

**Strengthened our IT system controls and security**, adding such items as VPN and multi-factor authentication.

86%

of our residents feel safe in their communities

YEAR IN REVIEW

87%

of our residents would recommend their community to a family member or friend

90%

is the average REAC score for the housing portfolio (national average is 85.9%) Real Estate Assessment Center (REAC) is the U.S. Department of Housing and Urban Development's housing quality performance assessment.

#### HRIS (UKG system)

Implementation of UKG (Ultimate Kronos Group) is underway — integrates HR functions into a unified system.

- Reduce the number of disparate systems for HR and Payroll
- Improve and maintain data integrity of the system to allow for data-driven decisions
- Enhance manager and employee access

#### PACE expansion to three new sites:

- Jefferson County, Kentucky
- Northern Kentucky
- Prince George's County, Maryland



#### HOME HEALTHCARE



A resident of Parker Skyview in Minneapolis, MN, Rohan Campbell exemplifies how residents and the VOANS team work together to make a home, even with the most challenging of circumstances. Parker Skyview offers affordable, subsidized home healthcare for low income adults 50 years and older.

Rohan came to VOANS with significant medical issues including Diabetes, Polymystostis and Interstitial Lung Disease. With individualized care and compassion, the team at Parker Skyview helped Rohan get back to playing the guitar and enjoying his life again. Rohan highlights how simple questions such as "is there anything you need?" to more complex task management of his medications and medical appointments demonstrate VOANS commitment to residents and their healing and wellness. Daily check-ins by the VOANS team allow for needed adjustments. Rohan says he "marvels at the attentiveness to my physical healing." Rohan describes how blessed he is and how he appreciates the team "they offer compassion, transparency, efficiency and the highest possible care in pursuit of my happiness and peace of mind. Thank you."

Rohan is a native of Guyana, South America. He learned to play the guitar from Dr. Elizabeth Schlenker from Silverdale, PA who was a missionary at the time. Rohan later immigrated to the United States and enjoyed his career as a securities Investment Analyst for Mutual of Omaha, and Investment Banking Manager for Lutheran Brotherhood. He is a proud father of three girls and a grandfather of two granddaughters. He again has a home where he is comfortable, and his family knows he is safe.

### ROHAN CAMPBELL





Together with Volunteers of America, Inc. and six (6) affiliates, VOANS received a \$1.1M Public Health AmeriCorps grant to deploy 38 Community Health Workers in seven (7) states and Puerto Rico. The new Community Health Workers provide outreach, assist in navigation of services, and provide counseling and coaching to underserved populations to increase access to health care and address health inequities. VOANS will deploy:

 Community Health Workers in the Western Slope of Colorado to extend the reach and service of the care and resource services.

• Community Health Workers in affordable senior housing in Puerto Rico.

PARINERSHIP HIGHIGHTS

Paloma Garden received an allocation of low income housing tax credits from Colorado Housing and Finance Authority. Elevating available housing options for low-income older adults age 62+ in Colorado Springs, the community results from the combination of two adjacent properties into one new affordable housing community.

The re-development preserves and adds to affordable housing in the area, with construction of a **new 75 unit** apartment building and **renovation of a 50 unit** existing building formerly known as Laurel Gardens.

Additional financing will be provided by the City of Colorado Springs and the State Division of Housing as well as the Colorado Health Foundation with a \$250,000 grant to underwrite the Aging with Options at the property.





In collaboration with **Parker Health Group**, VOANS developed and launched **CommUnity Commons**, a health and wellness community engagement platform for residents at Harborview, a 100-unit affordable senior housing community in Jersey City, NJ.

Through CommUnity Commons, residents can access on-demand fitness and wellness videos for older adults, curated health education, and virtual events.

Launched a **new Aging with Options** site at **Crestfield Apartments** in Wendell, NC., including hiring a part-time Community Health Worker. Program funders are United HealthCare and Stewards of Affordable Housing for the Future.

**United HealthCare** and **Stewards of Affordable Housing for the Future** are funding Aging with Options at Desert Oasis I and II in Las Vegas, NV. This partnership includes a full-time Community Health Worker.

Local NBC Affiliate in Oklahoma City, Oklahoma *Pay It 4ward* team honored **April Wooten**, **Community Health Worker**, at Bent Oak property.

Article: <a href="https://kfor.com/news/pay-it-4ward/pay-it-4ward-team-honors-frontline-fighter-at-choctaw-senior-home">https://kfor.com/news/pay-it-4ward/pay-it-4ward-team-honors-frontline-fighter-at-choctaw-senior-home</a>

Video: https://youtu.be/iD7S svvSkE





## Innovative Dwellings Permanent Supportive Housing Solutions for Veterans

VOANS was awarded a three(3) year, \$3 million grant from the Wells Fargo Foundation in 2020 to **create 125 units** of permanent supportive housing for homeless veterans in four VOA markets: Austin, Los Angeles, Minneapolis-St.Paul and Raleigh-Durham.

Innovative Dwellings, within VOANS National Housing Development Initiatives, began by conducting research and outreach into small scale affordable housing options available in these four markets that could efficiently meet the housing need of low-income residents while adhering to local ADU and infill housing ordinances.



Through strategic partnership with VOA affiliates and local Accessory Dwelling Unit (ADU) builders, the Innovative Dwellings program has developed unique small-scale solutions to affordable housing, demonstrating how panelized and volumetric modular construction methods can be adopted by other mission-driven affordable housing providers to create more efficient unit delivery.

One such partnership is with Minneapolis based ADU designer / builder YardHomes. These ADUs averaging 400 to 500-squarefeet can be created in two ways; as panelized "wall" segments constructed in a factory and transported to the site for final assembly or as a complete volumetric modular unit, including interior fit-out, where the finished ADU is transported from the factory and positioned on site via crane. Depending on conditions, the entire process from design consultation to utility hook up can be completed in as little as 6-12 months.

Innovative Dwellings is now halfway through the 3 year grant life with Wells Fargo Foundation and has 81 units in planning.





# PACE Senior CommUnity Care

Program of All-inclusive Care for the Elderly (PACE)

#### **NORTH CAROLINA, since 2013**





#### Meet the Julias

\* New 2023

They come to PACE Day Center for the companionship.....and the activities, games, classes, exercise, the support from the social workers and the Medical team are just bonus. "Wow when something is wrong or we are not feeling good (SNAP), they're on it!"

One Julia said she had heard about PACE from an insurance agent and a lady at the bank. The other Julia stated she met one of the PACE staff at the rec center in Delta and talked her into joining.

When I asked why they stay "I would never leave because of the friendships I have made, both with participants and staff — it keeps me going."



#### The Pat Sheridan Fellowship Program

In partnership with Stewards of Affordable Housing for the Future (SAHF), VOANS honors the career of housing leader Patrick ("Pat") Sheridan and hopes to inspire a new generation of social leaders in the affordable housing industry. Pat recently retired from VOANS, having worked for 40 years to ensure safe, secure affordable housing for low-income individuals and families while creating thriving communities in rural and metropolitan areas. Following in Pat's footsteps, this paid fellowship is an opportunity to work with two leading national affordable housing organizations to advocate for affordable homes for individuals, families and seniors.

#### Rachel Wilson

Rachel, our inaugural fellow, worked with VOANS while finishing her Master of Public Policy at Georgetown University. Originally from Oakland, CA, Rachel earned her undergraduate degree from UCLA. Rachel worked on projects such as the Housing for Healthcare and Justice fund, providing policy updates, drafting communication briefs and connecting federal programs to policy solutions, so the VOANS team was well versed when advocating with policy makers and stakeholders. "My experience at VOANS has been instrumental in connecting the bigger picture of policy making to tactical needs on the service level." Rachel is currently a Program Analyst for the United States Department of Housing and Urban Development's Asset Management team.

#### **Brooklynne Lowry**

Brooklynne is a student at Howard University majoring in interdisciplinary studies with a concentration in community development, and minor in political science. After graduation in December 2022, Brooklynne plans to pursue a Master of Social Work and hopes to secure a career in affordable housing. Brooklynne organized virtual lobbying days with Congressional staff and gained valuable experience in housing policy, housing development, and workforce development issues. She was able to learn about different housing policies and tools, especially as they related to funding sources.

#### Undergraduate Internship Program

#### Sofia Warkentin & Sierra Hopkins

Sofia is a Senior at Christopher Newport University, majoring in Anthropology with a minor in Leadership Studies and History. Sofia was instrumental in creating a new "Job Fair" kit that can be ordered and used by communities, and Talent Acquisition Partners for a fully VOANS branded job fair. The kit contains branded tables, banners, pop-up banners, and much more!

Sierra is a Junior at the University of Maryland, majoring in Information Systems. Sierra's creativity really shined when she created several recruiting posters, and a new employee referral card that will be incorporated into the new hire orientation packets.

## BUILDING FUTURE LEADERS





#### **SENIOR LIVING**



#### **Bob Lachance, Command Sgt Major**

Army National Guard, Rhode Island

The first thing that strikes any onlooker is that Bob Lachance wears his uniform with pride and years of practice. Bob and his wife of 63 years, Milly, are a doting couple who are humble, yet proud, of their life together. They never planned to retire in Florida but Rhode Island winters, friends and Bob's diagnosis of Alzheimer's led them to Gulf Coast Village in Cape Coral, FL. Milly has peace of mind that Bob can safely walk to exercise class every morning and stay active while she stays busy and addresses her health.

Bob was active duty for three years during the Korean War and then spent his career with the National Guard. His time afforded him to utilize the GI Bill to earn his Associates Degree from the Community College of Rhode Island in 1978 when his oldest was a senior in high school and along side Milly who earned her degree as well.

The father of four children, grandfather to 12 grandchildren and 12 great grandchildren are a source of immense joy, Bob's exemplary service in the Army and then the National Guard became a life of service that his sons and grandson emulate. His son, Russ, is a graduate of WestPoint and now Dean of Academic Affairs at the school. Following in Bob and Russ' footsteps, his grandson also graduated from WestPoint. Another son is a physics professor at WestPoint. Bob lit up when he shared that when Russ was in Jump School, he was able to jump with him and ultimately pin his wings on him.

Don't be fooled by Bob's quiet demeanor. He is a lifelong singer whether at church or home or for 20 years with the Cape Coral Barber Shop Singers. In fact, singing has helped him during the challenges presented by Alzheimer's. He joined the Alzheimer's Intermezzo Choir in Ft. Myers. A group that helps those affected by dementia to stay connected to music and to one another.

Thank you Bob for your service, for your voice and for sharing your story.

## **BOB LACHANCE**



## VOLUNTEERS OF AMERICA NATIONAL SERVICES BOARD OF DIRECTORS AND OFFICERS FY22

**Michael King** (ex-officio) || President Alexandria. VA

**Patti Andreini Arnold** // Board Chair Retired White Salmon, WA

Nancy Rase // Board Vice Chair Retired Annapolis, MD

**Thomas C. Dolan, PhD** // Board Secretary
Executive Coach, Consultant and President
Emeritus, American College of Healthcare
Executives
Elmhurst, /L

Jane W. Burks // Board Treasurer Retired Louisville, KY

**Beth Mullen** // *Director*Partner, Affordable Housing Practice Leader
CohnReznick
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**Derrick Perkins** // *Director* SVP, Market Executive, Bank of America *Washington, DC*  Pierre Vigilance M.D., MPH // Director
Vice President, Population Health & Social
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Executive Director, Health Utility Grids &
Equideum Foundation
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**Steve Wakefield** // Director Retired Dallas, TX

James LeBlanc // Director Retired Baton Rouge, LA

**Andy Edeburn, MA** // Director Elderly Dynamics Rockford, MN

**Keith Knapp, PhD, HSE, CNHA** // *Director* Senior Advisor on Adult Programs, Office of the Secretary, Cabinet for Health & Family Services *Frankfort, KY* 

**Shawn Bloom** // Director
President/CEO, National Pace Association
Alexandria, VA

Jeanne Peterson // Director
President/CEO, Peterson & Associates
Affordable Housing Connections
Sacramento, CA

#### **VOANS EXECUTIVE STAFE**

Michael King Chief Executive Officer

Kimberly Black King Chief Operating Officer and Chief of Real Estate Development

**Joseph Budzynski** *EVP, Chief Financial Officer* 

**Peter Desjardins** Chief of Real Estate Operations

**Jacci Nickell**Chief of Senior Living Services

**Paul F. Soczynski** Chief of Community Healthcare

**David Osborne**Chief of Information and Technology Officer

On behalf of the VOANS Board of Directors, I extend our deepest thanks and appreciation to Sharon Wilson Geno for her service at the helm for five years as VOANS Chief Operating Officer. Under Sharon's leadership, the organization made great strides in building an infrastructure for growth. Sharon led the organization through two years of a worldwide pandemic that changed the way we work. It was her leadership that helped VOANS recognize its own resilience in the face of the pandemic. We wish Sharon well as she embarks on her next adventure; we are certain that she will continue to make enormous impact within the industry as she contributes her many gifts and talent.

Patti Andreini Arnold Board Chair, Volunteers of America National Services



## A TRIBUTE TO SHARON WILSON GENO



## VOLUNTEERS OF AMERICA NATIONAL SERVICES COMMITTEE MEMBERS FY22

#### **Karen Erickson**

Optum

Minneapolis, MN

#### **Cormekki Whitley**

Clasp

Washington, DC

#### Leila Finucane

Victory Housing

Washington, DC

#### **Christine Richardson**

Locke Lord LLP

Austin, TX

#### **Ruth Mickelsen**

University of Minnesota, School of Public Health *Minneapolis, MN* 

#### **Karen Hackett**

Retired

Amelia Island, FL

#### Pushpita Kotikalapudi

CohnReznick

Bethesda, MD

#### **Carmen Jackson**

American Society of Clinical Oncology Alexandria, VA

#### Dr. Erica Alexander

Inova Health System *Alexandria, VA* 

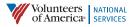
#### **Russ Snyder**

President and CEO Volunteers of America Chesapeake Lanham, MD

#### **Carol Moore**

Retired

Palm Beach Gardens, FL



## \$253.4M

TOTAL HEALTHCARE Revenue and Equity

\$188.3M

TOTAL HOUSING Revenue and Equity

\$141.4M

\$13.4M

Properties

Equity

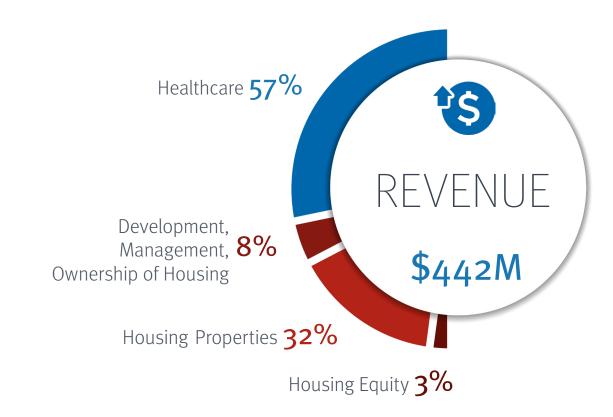
\$33.5M

Development // Management // Ownership

89.8%

of organizational expenses goes directly toward program activities

## VOANS AND AFFILIATE ENTITIES — END OF YEAR REVENUE AND EQUITY



Complete audited financial statements are available upon request

<sup>\*\*</sup>Figures are based unaudited financial statements



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