

# ACCOMPLISHING EXTRAORDINARY THINGS TOGETHER



WESTMINSTER<sup>SM</sup>

2023 ANNUAL REPORT



WESTMINSTER<sup>SM</sup>





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# Extraordinary, Together

## Building on Our Legacy as a Wonderful Place to Live and Work

Every year Westminster becomes a more extraordinary place to work and call home. For our residents, we provide a high-quality lifestyle, continuous learning and friendships, and the impeccable services they deserve. For our associates, we provide valuable training, career mobility, and strong pay with benefits. We give them reasons to stay.

I continue to take great pride in the supportive culture we imbue at Westminster. Our associates take pride in their work and our residents appreciate their service. This mutual friendliness and respect are truly unique among retirement communities. We don't take it for granted – “people first” is one of our core values as a community.

This past year was very busy. We continued to win national awards for healthcare and independent living. We opened our third building, the Carlisle,



and welcomed more than 100 new residents to our community. The Mayor, Westminster Board of Directors and leadership team helped cut the ribbon. We launched our strategic plan (see page 6), which further defines the goals and values our



community believes are important. Lastly, we unveiled our new community brand – reflecting the bright, modern, and vibrant lifestyle and work environment we embody at Westminster.

If you know me, you know how much I love baseball. Babe Ruth got it right when he said, "You may have the greatest bunch of individual stars in the world, but if they don't play together, the club won't be worth a dime." I firmly believe Westminster is the best retirement community in the nation thanks to our amazing residents and associates who live and work in unison. We are Extraordinary Together.

Thank you for reading the stories and accomplishments in this annual report, a longtime tradition for our community. Please let me know if you have questions or feedback. My door is always open.

A handwritten signature in black ink that reads "Chuck Boyer".

## Living and Thriving in Austin

Austin continues to rank amongst the best places to live in Texas and is an especially great destination for retirees who benefit from the city's vast array of cultural resources and excellent healthcare. As Austin experiences another boost in technology and development, which is very much focused on the vibrant city center, there's never been a better time to live at Westminster.

To get an insider's view on Austin's growth, Westminster invited *New York Times* best-selling author Larry Wright to our annual book festival to talk about his article for *The New Yorker* on the "Astonishing Transformation of Austin." Though Larry provided one perspective on Austin's transformation into a more urbane megacity, he also noted that Austin exudes a welcoming small-town charm that makes people want to live and work here.

*U.S. News & World Report* described Austin as a city with "contagious vibrancy and enthusiasm." That spirit is felt at Westminster where thousands of activities are hosted on and off campus every year. Popular tours include museums such as The Contemporary Austin and the Bullock Texas State History Museum, as well as outings to Austin's bustling entertainment district, where old buildings have been converted into restaurants, bars, and shops. Westminster residents enjoy nights at the symphony and theater, and performances by world-class musicians who visit our campus. Out-of-town excursions take residents to vineyards, wildflower tours, and historic landmarks. At our backdoor are walking trails and a new park, where residents enjoy the unique ecological beauty of Central Texas.

Progress and growth bring a robust workforce. Westminster presently employs 350 associates to serve 600 residents. And every year we rank as a "Top Workplace" in Central Texas.





When Westminster was founded in 1967, continuing care retirement was a new industry, and over the last 56 years, Westminster has continued to raise the bar and define the standards for a high-quality lifestyle. Today, Westminster associates and residents are thriving and showing the world how they are **“Extraordinary Together.”**



**WESTMINSTER**<sup>SM</sup>  
**Extraordinary Together.**

# MISSION

*Enriching lives through inspired experiences.*

## VISION

We are dedicated to providing a nurturing, purposeful, connected, and abundant life for all we serve.

### CORE VALUES

Resident centered, always  
Community operation with inclusion and integrity  
People first  
Dedicated and engaged associates  
Financial stewardship  
Innovative and nurturing culture  
Environmentally conscious

### GUIDING PRINCIPLES

We provide hospitality and first-class services in a secure, warm, and inviting community.  
We find unique ways to bring joy to our residents and associates.  
We provide premiere health care that promotes and encourages independence, physical, social, spiritual, and intellectual growth, while treating everyone with dignity and respect.  
We consider the impact of our actions on the world, and we do our best to make the world a better place.  
We seek and adopt innovative solutions.  
We act honestly with ourselves and others.  
We communicate well and often.



## Seeking Excellence

This past year our residents and associates participated in crafting strategic planning language that fully captures our purpose and culture. While this exercise is useful in communicating who we are, it also reinforces our status as a nonprofit community that puts people first.

## Satisfaction Thrives

Westminster is known for being a great place to live – full of new experiences, satisfying friendships, modern amenities and accessible healthcare. **Our residents voice their satisfaction.**

**97%** Westminster's  
Hospitality Score

**96%** Would recommend Westminster  
to friends and family

**93%** Very satisfied with  
Westminster as a place to live

**91%** Feel at home at  
Westminster

*SOURCE: 2022 RESIDENT SATISFACTION SURVEY*

## Why does being nonprofit matter?

**Values-Driven:** Our care for the needs of the residents is more important than increasing profits.

**Stability:** Residents, staff and the community enjoy peace of mind because the organization is not easily affected by economic fluctuations.

**Community Oversight:** A volunteer board of directors ensures quality services & leadership.

**Quality:** Our barometer measures effective work, not earnings.



## Westminster wins best in industry every year

- Best Nursing Home, Honor Role - *U.S. News & World Report*
- Best Independent Living and Assisted Living - *U.S. News & World Report*
- Best Short-term Rehabilitation and Nursing - *U.S. News & World Report*
- AIRE Award for Assisted Living
- LCS Top Resident Satisfaction Among Senior Living Communities (5th year) - J.D. Power Award
- LCS Gold Safety Award
- LCS Harrison Award for Deficiency-free Recertification
- Communitas Leadership Award



Westminster's Associate Executive Director, Sarah Loyd, was featured in *Forbes* and *Fortune* in a special magazine feature, "Austin's Extraordinary Women Doing Extraordinary Things." Sarah discussed Westminster's founding as the first not-for-profit retirement community in Texas to combine housing with 24/7 healthcare.

**"My mother became a Westminster resident in 2019. This isn't just business; it's personal. I believe in this community."  
~ Sarah Loyd**

AS SEEN IN

## Fortune | Forbes

**AUSTIN'S EXTRAORDINARY WOMEN DOING EXTRAORDINARY THINGS**

# Living to the Fullest

Downtown Austin's **Westminster** is an urban senior living destination featuring world-class amenities, residences, and care.

**S**ituated among top restaurants, retailers, and hospitals, Westminster is a premier senior living community as unique as Austin itself. Founded in 1967, Westminster was the first not-for-profit retirement community in Texas to combine the privacy of apartment living with the comprehensive services of a 24/7, on-site health center. Today, the Life Plan Community is home to nearly 450 independent living residents and an ever-expanding array of amenities.

"We've grown to 378 independent living, 36 assisted living, and 38 memory support apartments. Additionally, we have 85 CMS 5-Star-rated skilled nursing apartments, with 30 of those units dedicated specifically to rehabilitation. Overall, we encompass over nine acres near downtown Austin," says Sarah Loyd, associate



"Westminster isn't your average senior living facility," Loyd adds. "Our dining venues are a delicious representation of our hometown," including an upscale steakhouse and cocktail bar, located within Westminster's Carlisle expansion.

Opened in early 2023, the five-story building adds premium residential independent living accommodations with memory care and assisted living accommodations with three

within itself," says Loyd. "This is urban senior living."

### A Continuum of Care

As a Life Plan Community, Westminster provides seniors peace of mind with specialized care when they need it.

"Residents buy into our community with an entrance fee that ensures access to our entire continuum of care. Costs and fees remain the same as they move between independent living, skilled nursing, and rehab, or transition to assisted living," Loyd explains.

Rated five stars by the Centers for Medicare & Medicaid Services for 15 years running, Westminster provides round-the-clock medical and memory care with convenient transportation to off-site appointments. Westminster also earns Top Workplace honors, and recognition from *U.S. News & World Report* every year for its rewarding workplace culture and outstanding level of services.

"Families can rest easy knowing their loved ones receive dedicated support and care," says Loyd, who speaks from personal experience. "My mother became a Westminster resident in 2019. This isn't just business; it's personal. I believe in this community."

With a view to the future, Westminster plans to keep growing bigger—and better.

each day is filled with physical activities, from Pilates to tai

levels of underground parking. The development expands

## Opening the Carlisle

Last summer, Westminster opened its third residential building equipped with roof-top solar panels for energy conservation and spectacular décor that reflects downtown sophistication. The Carlisle provides spacious independent living residences and a fine-dining restaurant, in addition to the many luxurious amenities and healthcare available to residents throughout the Westminster community. The Carlisle also contains assisted living and memory support apartments accessible to current residents, as they require additional care, and to a limited number of outside resident guests or referrals.





Mayor Kirk Watson joined Chuck Borst, Executive Director of Westminster, members of Westminster's Board of Directors, representatives from the Austin Chamber of Commerce, project partners, and Westminster residents and associates for the Carlisle ribbon-cutting.

# Authentic Lifestyle

## Keeping retirement fun

Westminster is often likened to a cruise ship with beautiful scenery, delicious and bountiful food, excellent amenities, and continuous learning opportunities. The breadth of activities and friendships offered here are endless. Here is just a taste of our culture.

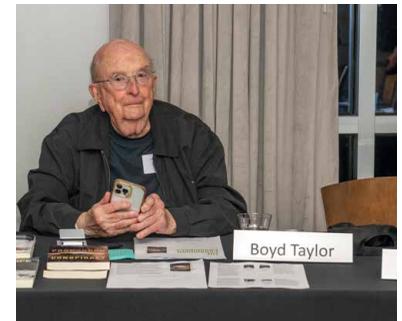
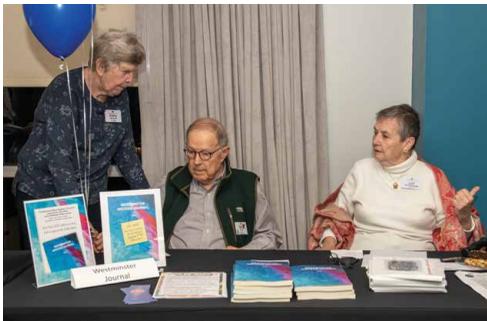
Westminster is home to the literati. Our resident writers' journal is the only publication in the country written exclusively by residents of a senior community. Since its launch in the spring of 2020, we've published five issues featuring fiction, non-fiction, memoirs, and poems from 80 authors. Copies of The Westminster Journal are sold at local stores and on Amazon.



Celebration of volunteer editors, copy editors, publicity team, and art editors.



We also host the nation's only book festival for seniors. This year, Larry Wright, Pulitzer-Prize-winning author and playwright, discussed his newest best-seller *Mr. Texas*. Keynote author, resident authors, and the Journal Committee sold books.



*"Art class with Maria is a high point of the week in learning and in pleasure."*  
~ Resident,  
Joan S.



Westminster displays a rotating gallery of spectacular resident art from oil, acrylic, and watercolor paintings, to ink and pencil drawings, photography, collages, and more. Art instruction is offered to beginning artists, art enthusiasts, and professionals.

Celebrating residents who achieved remarkable milestones is a tradition at Westminster.



Whether it's reading groups, poetry and creative writing classes, and two resident publications – *The Banner* and *The Journal* – residents share a love for language.

# Welcome, friends

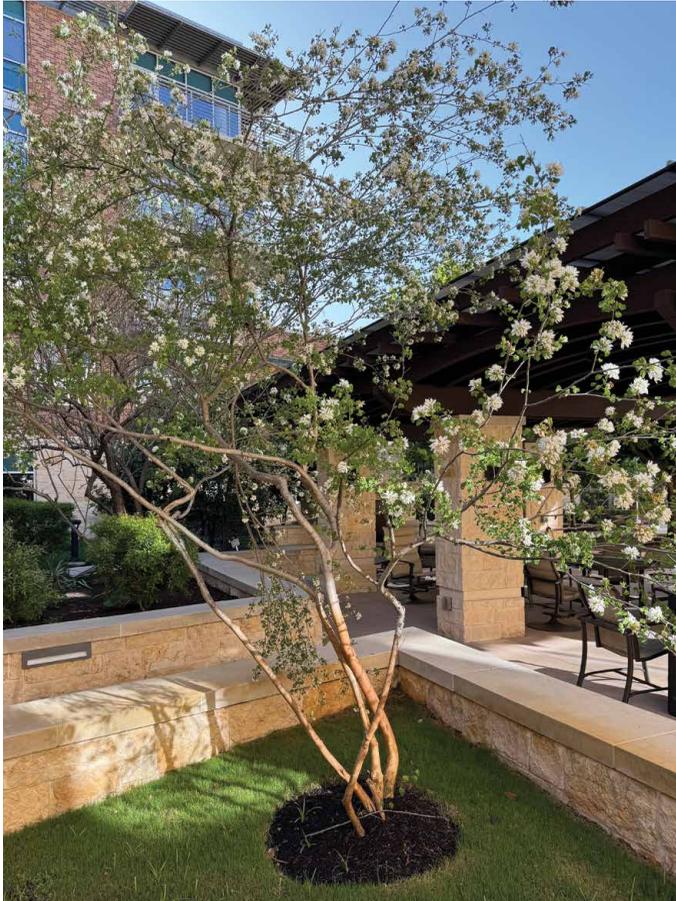


**At Westminster, new residents are greeted like old friends by the Westminster Resident Association's Welcoming Committee**

Westminster residents are an integral part of all decisions in their community. From governance and expansion to programming and healthcare, residents work closely with associates to plan their lifestyles. The Westminster Resident Association committees are open to residents who wish to serve.

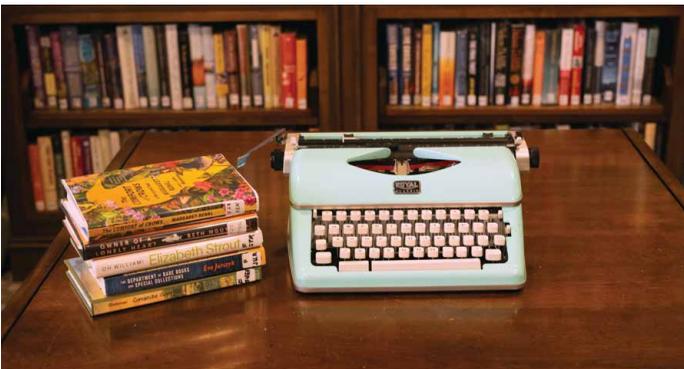
- **Activities**
- **Arbour Volunteers**
- **The Banner**
- **Buildings**
- **Food Service**
- **Fundraising**
- **Health & Wellness**
- **Hospitality**
- **Information Technology**
- **Interfaith**
- **Landscaping**
- **Library**
- **Residents Appreciation Fund**
- **Welcoming**
- **Writers Journal**

The Landscaping committee helps plan lawns, shrubbery, flower beds, and planters. After two years of freezes, Westminster had to redo much of its landscaping, which was an opportunity to install a vast irrigation system and plant new flora. The garden committee nurtures vegetables and plants and welcomes butterflies in the Windsor Courtyard.



***“We want to appeal to people, birds, and butterflies.”  
~ Resident committee co-chair Bobbie C.***

Library committee hosted Books & Bubbles to celebrate the completed renovations of the library.



The Westminster Activities Committee brainstorms and helps plan activities for the residents that include lectures, music and theater performances, trips to museums, restaurants, historic sights, wine, beer and spirits tastings, and much more.



The Hospitality Committee plans big parties throughout the year and makes sure their fellow residents are served plenty of refreshments and friendship.



## Cutting a Rug at the Broken Spoke



## Willie Nelson Recording Studio



## Blanton Museum



## Deep Eddy Vodka Tasting



## Texas Natural History & Science Museum



## Austin Civic Wind Ensemble



Residents enjoy each other's company and love any excuse for a...

# Good Party!

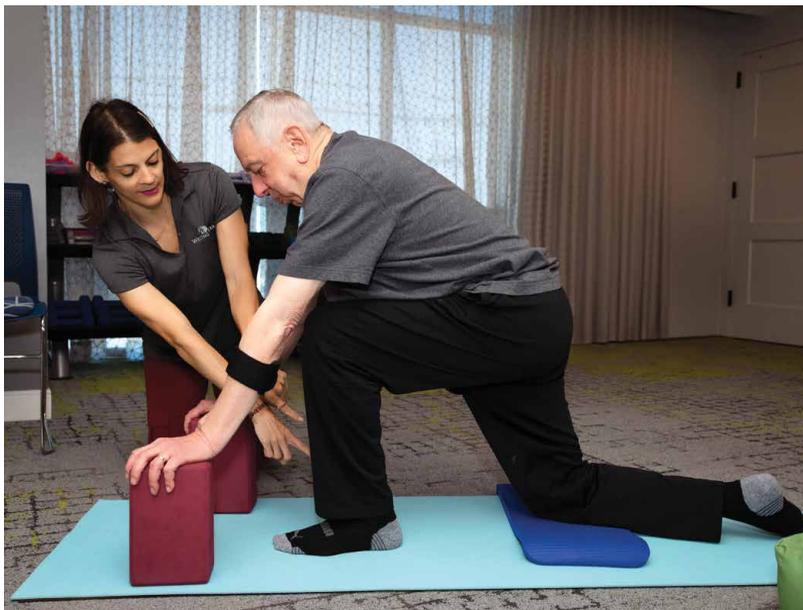






## Westminster is constantly in motion.

Residents have access to 20 fitness classes, such as Gentle Yoga, Interval Training, Just for Men, Beginner Pilates, Core on the Floor, and Aquafit, taught by certified instructors. Residents are encouraged to undergo a Senior Fitness Test and orientation to set physical goals and fitness needs. In addition to classes, various fitness and wellness workshops are offered quarterly. The gyms and rehabilitation rooms are popular with residents who want to stay in shape or need to heal from injury. Getting outdoors is also popular. Residents love to walk around our courtyards, along many of Austin's parks and pathways, or through the beautiful neighborhoods surrounding Westminster.





**waterloo greenway**

**Waterloo Park**

**Legend**


**Open - Abierto**  
8 AM - 10 PM

**Rules - Reglas**


**For more info:**

Waterloo Park is a public facility brought to you by the City of Westminister and the University of Waterloo and Waterloo Community Foundation. We are committed to providing a safe and enjoyable experience for all who visit our park.

[www.waterloogreenway.com](http://www.waterloogreenway.com)

[info@waterloogreenway.com](mailto:info@waterloogreenway.com)

Rosemary and R...

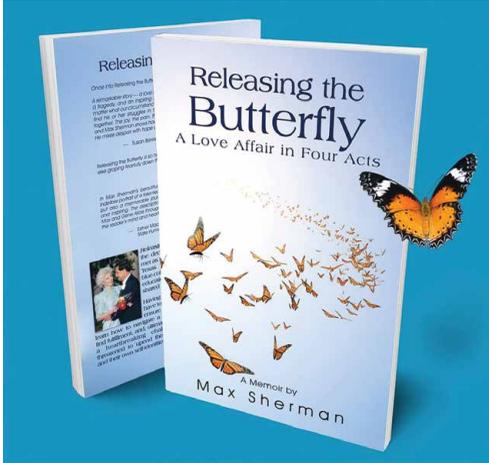
Westminster was recognized as the **Top Fundraiser** of all LCS Communities for 2023 Alzheimer's Disease Campaign and **Top Fundraiser (8th year)** by Alzheimer's Texas.

## Generosity of Spirit

Westminster residents and associates shared the culture of giving by donating approximately \$300,000 to nonprofits in Central Texas in 2023.

- Alzheimer's Texas
- American Foundation for Suicide Prevention
- Anderson High School PTSA
- Austin History Center
- Austin Partners in Education
- Capital City Village, Inc.
- Carrying Hope
- CASA of Travis County
- Central Texas Food Bank
- Child Inc.
- Educational Institute on Aging
- Family Eldercare
- Habitat for Humanity
- Marketplace Chaplains
- Martha C. Gooding Foundation for Compassionate Nursing
- McCallum High School PTSA
- Refugee Services
- SAFE
- Texas Cultural Change Coalition
- The Salvation Army
- The Settlement Home for Children

Westminster continued its close partnership with Alzheimer's Texas by raising **\$238,351** last year alone, nearly quadrupling its goal. The community launches its fundraising campaign in July and continues through October, raising money with fun events like a food truck party, silent auction, Kendra Scott Gives Back party, and the famous annual Westminster Dog Show, one of the community's favorite traditions. Literacy is another passion at Westminster, inspiring one resident to donate proceeds from a book about his family's experience with Alzheimer's.



## The Westminster Dog Show is a tail-wagging good time for a good cause.

Contestants parade their pooches in front of a packed house. Prizes are given for Best Trick, Best Tail Wagging, Best Smile, Best Costume, Best in Show and Most Want to Take Home.



Westminster also takes care of its own by providing educational opportunities and career mobility for its associates. In 2023, two of Westminster's associates received financial support from the Associate Education Assistance Fund, which pays 100 percent of the cost of school for Austin Community College (ACC).

Kadeem (pictured below) was hired by Westminster as a Certified Nurse Assistant. His exposure to residents, including several retired engineers, inspired him to return to school to achieve his associate degree in general engineering. His plans are to continue with his bachelor's degree and is currently taking mechanical drawing. "Westminster is helping me to achieve my dream," said Kadeem.



Romario (pictured above) worked full-time at Westminster while taking as many as three classes at ACC. Four years later, he graduated with a degree in Computer Aid & Design Engineering. "In Jamaica, I studied mechanical engineering and when I got to Austin, I decided to change my major when I saw how CAD assists with product design and manufacturing. I am very excited about my future."



# Resident Profiles

Our residents bring their rich experiences, talents, and interests to Westminster. Together, they create extraordinary stories of life.

## Deep in the Heart of Texas

Hamilton Beazley's Texas roots run deep. His maternal grandfather was born in the Republic of Texas and his grandmother was born when Texas was a "rebellious territory" of the United States. He laughs that he was raised by Victorians.

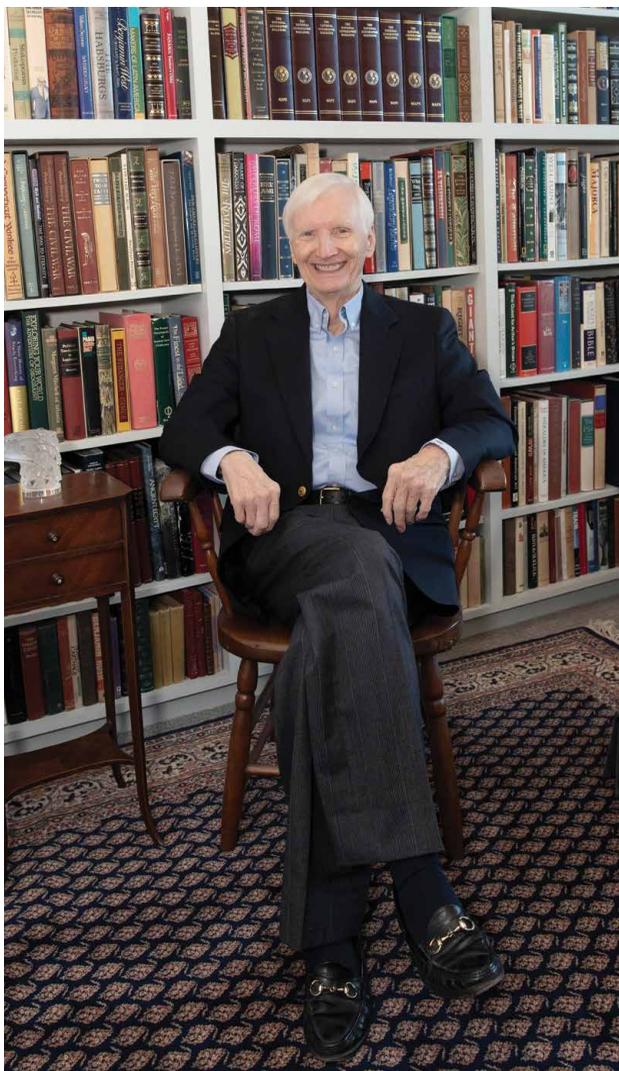
Schooled in Houston, Hamilton attended Yale, where he earned a degree in psychology, followed by an MBA in accounting and finance from Southern Methodist University, and later a PhD in Organizational Behavior at George Washington (GW) University at the ripe age of 55.

Hamilton's career has been as eclectic as his education. He served as president of the National Council on Alcoholism and Drug Dependence in New York City, where he helped transform public opinion about addiction. He developed campaigns to prevent and reduce underage drinking and encourage Designated Driving; testified before

U.S. Senator John Glenn's Committee; served on the Executive Committee of the Division on Addictions of the Harvard Medical School; wrote The Surgeon General's Call to Prevent and Reduce Underage Drinking; and appeared on the Oprah Winfrey Show.

After leaving the Council, he focused his energy on right-brain activities including teaching and writing. He taught in the Air Force Internship program at GW, where the brightest captains earned their master's in leadership and management. More recently, he served as "Scholar in Residence" at the Business School at St. Edwards. One of his most interesting projects was the creation of a family game show called "Secret's Out" for the BBC in London, which ran for three seasons.

He's written books on self-help, religion, and management, all from major American publishers. His



faith-based book, co-authored with the Episcopal Bishop of Texas, *Reclaiming the Great Commission* is about how mainstream congregations can prevent extinction by transforming the lives of their parishioners. He wrote *No Regrets: A Ten-Step Program for Living in the Present and Leaving the Past Behind*. Hamilton says a healthy philosophy is “to find healing from regret and to live richly in the present.”

Over the years, Hamilton has traveled extensively to the United Kingdom, Paris, the South Pacific Islands, Greece, and Rome, among other countries. He loves arts and culture, ancient civilizations, and blue water. His affinity for shades of blue stems from his being red-green color blind.

Hamilton is blessed with nine godchildren who live all over the country. One of his godsons came to Austin to help him downsize and move into Westminster last spring. He shopped other retirement communities, but there was no doubt in his mind that Westminster was the best choice for a myriad of reasons: nonprofit status, levels of healthcare, long legacy of service, central location, delicious food, and plenty of activities and friendship.

Hamilton works out with a trainer in one of Westminster’s gyms and enjoys the sophisticated concerts and lectures offered in the evenings. He recently joined the Food Committee and is advising the Westminster Residents Association on their fundraiser for the Austin Community College scholarship program. You can always find Hamilton relaxing in his elegant apartment filled with family portraiture, antiques, and blended contemporary décor.

## A Life of Faithful Service

Cathy Morgan is an educator. Fred is a Presbyterian minister. They met when he was attending Austin Presbyterian Seminary and she was teaching school at Ortega Elementary. After they married, he served a Presbyterian church in Corpus Christi, then served as Director of Admissions & Financial Aid with Austin Presbyterian Seminary, before serving longer ministries in San Antonio and Austin over a 40-year vocation.

Most of their early marriage was spent in San Antonio. Fred launched Holy Trinity Presbyterian Church with 20 families in a temporary building. Over his 14 years as lead pastor, the church grew to more than 500 parishioners, increased staff, and built two buildings. The Morgans then moved to Northwest Austin where Fred served as lead pastor for Hope Presbyterian Church. The serious nature of building Godly communities combines faith, management, fundraising, and construction. Imbued with a sense of humor, Fred likens the work of growing congregations to “pushing water uphill while trying to keep all the frogs in the wheelbarrow.”

Once their children were school-aged, Cathy returned to teaching as a secondary mathematics educator in San Antonio. At McNeil High School in Round Rock, she taught Advanced Placement (AP) and non-AP Statistics for more

than a decade. Her greatest success was seeing that “I got it!” look in her students’ eyes when the math clicked. “I worked hard, but I loved it.”

They admit that when both were working full-time, they were “like two ships passing in the night.” Fred’s weekday schedule was more flexible, so he chauffeured kids to their activities. Cathy took care of most of the cooking and evening activities. For many years, they invited church members to an Open House during the Christmas season.

After retirement and when they both turned 75, they decided they wanted to make a final move. Fred had led Vespers at Westminster and he and Cathy knew several residents, including fellow Presbyterians Jeanie Stanley, Judy Skaggs, and Martha and Hal Hopson. Westminster’s continuous care and nonprofit status appealed to them. Fred’s parents thrived in a retirement community, but he watched a lot of his older congregants die in various circumstances. Cathy’s father died at home while she was managing his round-the-clock care with as many as eight home health assistants. They decided they didn’t want to “strap our kids with that responsibility.”

While Cathy found it difficult to leave her bounteous flower and vegetable garden, she has found refuge at the Sunshine

Community Garden nearby. She also joined a group at Westminster that is sharing tips on how to grow popular indoor plants.

Fred golfs 18 holes three days a week. “It’s good exercise and fellowship.” He also serves on the regional Presbyterian Church Service and in the Rotary Club. Occasionally, he is invited as a guest preacher. Upon retirement, Fred narrowed some 1,500 sermons to his favorite 30 and self-published the collection as a gift to family, friends, and former colleagues.

Both worship at University Presbyterian Church where Cathy works weekly to provide food and other assistance to neighbors in need and sells Fair Trade products to benefit farmers. Fred serves on several committees in the church.

They stay busy at Westminster connecting with interesting people, participating in the interfaith book groups, and attending amazing concerts and lectures with long-time friends who have also moved to Westminster. And more of their friends are moving here soon.



Their adult children and their families visit often and are invited to help their parents spend their dining dollars at the end of the month! Travel is still an important part of their lives, including annual family trips to MoRanch, as well as past trips with friends to Australia, New Zealand, Kenya, Israel, Peru, and throughout Europe. On several occasions, Fred has been invited to preach in English Manor Churches.

Retirement has given them choices and none more important than where and how to live. The Morgans continue to be in service to others while enjoying their own interests and each other.

## “Westminster Abby”

Abby Kenigsberg loves the western-facing views from her apartment. “The sunset is one of the greatest shows on Earth,” she reports. She also loves the weekly get-togethers for the fifth floor. “It’s like the old days of the water cooler. We catch up on everything from the latest menu, the best movie, the people who need our help, and even the changing scene in Austin.”

Born in Connecticut, Abby attended college in Massachusetts, got married, and then moved to California, where her husband completed his pediatric surgical training. She had begun working on her master’s in theatre from Yale University and transferred to UCLA. Once back on the East Coast, she and her husband settled on Long Island where they raised three sons.

Dr. Kenneth Kenigsberg was a brilliant pediatric surgeon who was famous for separating conjoined twins in 1979. After a distinguished career, he and Abby moved to Austin to be closer to one of their sons. “Our three sons called a meeting and gave us the usual ‘you’re getting older speech,’” she says. “We want you to pick a city so one of us can keep an eye on you.” One of her sons and family lives in Boston



(too cold). The other lives abroad (not practical). And a third son lives in Austin with a wife and school-age daughter. “He showed us the Driskill Hotel and the Big Top Candy Store. Guess what city won.”

In addition to raising three sons, Abby paved a career path. She began teaching theater at Dowling College and writing film reviews for the Long Island radio station, WGSM. “I got the job by winging it. I learned to write for the ear and keep reviews to 16–20 lines.”

She believes the zenith of her career was founding and managing the Long Island Coalition for Fair Broadcasting for two decades. In those days, New York City was the “center of the universe.” Boroughs like Queens/Long Island were ignored even though most of the metro area lived and worked outside

Manhattan. She worked closely with NYC broadcasters to provide positive features about the Long Island community and its people. The coalition's preeminent fundraiser, key-noted by Texan Dan Rather at CBS, among other celebrities, recognized the radio and television stations that gave outstanding coverage of Long Island news.

Throughout her life, Abby has written plays, poems, and two books. Her self-published book, *Shenanigans*, humorously chronicles her life journey which is both conventional and "a few steps from the oddball." Check out [www.abbykenigsberg.com](http://www.abbykenigsberg.com)

This spring she is hosting a reading of her play, *Ficklebrott*, starring fellow Westminster residents. And true to form, the male characters are silly and the women are smart. She also hosts an online seminar through the Jewish Community Association of Austin to critique and discuss articles, opinion pieces, and book and art reviews from *The New York Times*.

Since moving into Westminster, Abby has joined the Activities Committee – she says "Ruth is amazing. She finds ways to entertain all the different people, tastes, experiences, and opinions of Westminster residents." Abby also visits the gym every day to spin cycle or use a platform step. When she's not moving, she is reading and writing, and studying the Torah at Congregation Beth Israel.

Despite her independent streak, Abby and her husband were proud of their life partnership. She once came across a quotation by the ancient poet Homer and she and her husband used to recite it to one another.

*There is nothing stronger and nobler than when man and wife are of heart and mind in a house. A grief to their foes, and to their friends great joy. But their own hearts know it best.*

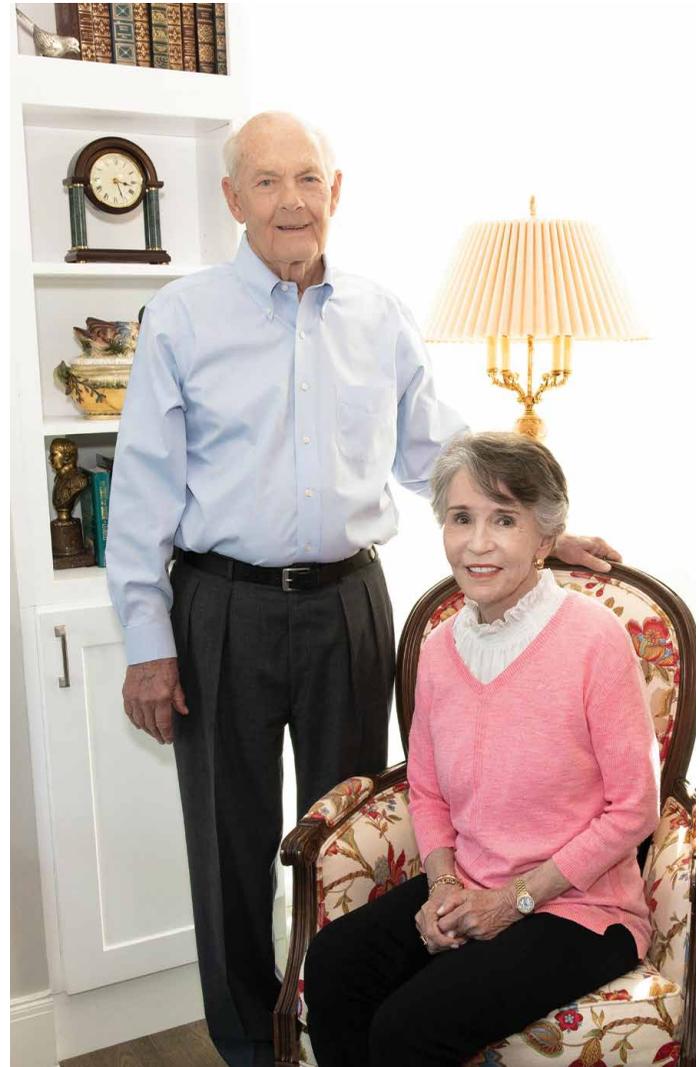


## Blending Family and Good Fortune

Anne and Jerry Winn have moved 11 times in the last 40 years, mostly around Austin and once to Wimberley. Not because they had to but because Anne finds moving “hard but exhilarating. I enjoy getting rid of old stuff and I like new situations.” They are both social and have friends at Westminster from “a former life” and plenty of new ones. Anne plays Rummikub and is a regular poet contributor to The Banner. She credits the Westminster Writing Group for helping awaken her talent. With help from a fellow resident, she has written her first book, *Pound Cake and Personalities*, about life in a small Texas town.

Jerry was born in Tyler and grew up in Austin and graduated from the University of Texas at Austin with a degree in civil engineering. He worked in the commercial construction business for three decades, and lucky for Westminster, has joined the community’s Building Committee. Jerry is an avid reader of history. In addition to his career, he also volunteered for many years at the Austin Heart Hospital and he and Anne had season tickets to most Longhorn sports for decades.

The couple was set up on a blind date. Both have families from previous marriages. Together they have four children and six grandchildren, all of whom live in Texas. When they



began contemplating marriage, they trod cautiously. With two teen girls, Anne laughs that she wanted to know what insurance Jerry carried. Jerry's kids were already grown when he decided to take on two more. "Both of us were experienced at being in love and at the same time knew what life could throw at you," said Anne.

Originally from Houston, Anne attended the University of Texas and then returned to her hometown to teach third grade for a few years before moving back to Austin with her late husband. She's held various jobs but her most fun chapter was teaching aerobics at the YMCA on Town Lake. She convinced the male leadership at the "Y" to launch the class which became a big hit. Anne was ahead of her time encouraging students to work out and eat healthy – only one diet soda a day! She may only stand 5'2" tall, but Anne maintains her might by walking and playing golf with Jerry and with her own women's group. Anne has chaired The Junior League of Austin's "A Christmas Affair" and served in many capacities with the Settlement Home. Presently, she participates in the St. Bridget's Society cooking committee at the Episcopal Church of the Good Shepherd.

The Winns are big travelers. This spring they are going with Anne's two daughters to Mount Rushmore to satisfy Jerry's fascination with the structural design of this American landmark. They also plan to vacation in Maine for part of the summer. Past global adventures include several trips to Europe and Asia. Anne has taken dozens of educational trips across the country as a member of the Austin Antiques Club.

Since they have downsized in stages, the move to Westminster was pretty efficient. Their 4th floor residence looks south toward the UT Tower and is a stone's throw from one of their daughter's homes at The Grove. They love locking the door and leaving at a moment's notice, and not having to cook or wash dishes. They enjoy eating with friends in all the dining venues. When they had the unfortunate experience of catching COVID, Westminster took good care of them by delivering meals and wellness checks.

The Winns take life at their own pace, which isn't slow, but it is controlled. As they stand on their balcony Anne remarks, "Our place is perfect (for now)."



# Department Successes

At Westminster, our leadership team and our associates are the best in the business and their talent is visible in the attractive buildings and grounds, culinary sophistication, entertaining events and activities, exceptional healthcare, and the balance sheet that makes it all possible. **Our team is simply top-notch.**

## People

Although all of our associates are appreciated, each year we celebrate those who go above and beyond.

### Associate of the Year Isaac Hernandez - Plant Operations

Awarded for excellence in performance, distinguished accomplishments, making a difference at Westminster, excelling as a team player, and serving as a role model for advancing the goals and mission of Westminster.





<< Far left, from left  
Jenny Wallace, General &  
Administrative/Health Care  
Center; and Haley Steinberg,  
Health Care Center

< Left  
Jorge Aquino Sedillo, Plant  
Operations

∨ Below, from left  
Robin Gonzalez, Angie Raizis-  
Pena and Dian Self, Residential  
Health Services



▼ Below, from left

Gabriela Hurtado, Environmental Services;  
and Tracey Sims, Assisted Living

Monica Caro, General & Administrative;  
and Natalia Lipnevici, Assisted Living

Chef Tim Thurn, Food & Beverage; and  
Abbey Jordan, Food & Beverage



<< Far left  
Ann Lipscomb,  
Resident Health  
Services/Clinic

< Left  
Hortense Bujiriri,  
Health Center





In May we celebrated our invaluable associates by throwing a courtyard picnic. The leadership team grilled hot dogs, sausage, and chicken, and cooked barbecue chicken pizza in the outdoor oven.



## Meet Gabriela Hurtado

### *What do you like most about your job at Westminster?*

I am a housekeeper for the EVS department for Windsor and Carlisle residents. I assist with preparing new residences before move-in so that residents' first impressions of their new homes are excellent. I also maintain the cleanliness of residences and make sure that our common areas are tidy. I enjoy coming to work because of the culture and the ability to acquire new skills to be successful. Westminster has established a firm foundation for networking and development not only for our residents but for employees as well.

### *What advice would you give new hires?*

First, make a strong impression and take pride in your work. Second, learn to break the ice first and form trusting relationships with our residents and

with the people you work with. At Westminster, we have many unique associates and personalities, and that creates a positive place to excel. Lastly, do not shy away from asking for feedback. Be open to constructive criticism, besides improved work, this feedback grows the mind which is key for personal and professional development.

### *Tell us about yourself.*

I am a native Austinite and was raised in a family of four. In 2015, we welcomed my little brother who I encourage to be the best version of himself. I studied Culinary Arts at Del Valle High School and plan to take classes in dentistry at Austin Community College. I enjoy nature walks, animal training (rabbits and dogs only), makeup and fashion trends, running, exploring, and experiencing new food places. I consider myself a "foodie," I know all the hot spots!



## Miriam Amaro, Human Resources



*“A positive work culture is essential for the success and well-being of employees. Westminster succeeds in teamwork, appreciation, respect, and work-life balance, showing me what a true employer should be.”*

## Lloyd Smith, Environmental Services



*“When I moved to Austin from Jamaica, Westminster provided me with my first job in America, which allows me to provide for my family and achieve financial stability.”*



Austin American-Statesman  
statesman.com

For the 10th consecutive year, Westminster has won a Top Workplace honor from the *Austin American-Statesman*. Westminster also achieved honors in Workplace Cultural Excellence subcategories, including Workplace Appreciation, Professional Development, and Employee Well-Being for mid-size workplaces with 150 to 499 employees.

The Westminster Leadership Institute was created in 2014 to provide training, tools, and skills that prepare our associates for leadership. In 2023, 19 associates graduated, bringing the total number of graduates to 75. This Leadership program results in lower turnover, higher associate satisfaction, and higher resident satisfaction.

## Nursing

Best Nursing Home,  
*U.S. News & World  
Report* (16 years)

The Arbour at  
Westminster 5-Star  
Rating (15 Years)

Zero health  
deficiencies in 2023

95% Rehab  
Success Rate

Exceptionally high  
clinical delivery by  
RNs, LVNs and CNAs

## Assisted Living

Best Assisted  
Living, *U.S. News  
& World Report*

Deficiency-Free,  
11 years

## Healthcare & Wellness

Our Life Plan benefit gives access to any level of care you may need while living at Westminster. Westminster provides extraordinary care by compassionate providers, including nurses, CNAs, and physical therapists.

### Onsite healthcare

The clinic is staffed by nurse practitioners (registered nurses who have received advanced graduate education and clinical training). Care is coordinated with your primary physician when appropriate. The clinic can provide medical care and prescriptions.

The Wellness Checks Program is an independent living support program designed to provide additional services to residents on a short-term basis after a qualifying event or as requested by Resident Health Services or the Wellness Clinic. In 2023, we provided more than 100 wellness check visits each week.

Our brand new walk-in Wellness Clinic is staffed by nurse practitioners who can address the most common minor healthcare concerns and will provide guidance to residents who require additional care. Our team can also

direct residents to rehabilitation and home health care.

The staff assists with dressing, meal ordering and delivering laundry, medication reminders, and vital signs as needed. Westminster was ever vigilant during the pandemic and as a result recovered strong. A local pharmacy





provides a flu and COVID booster clinic to ensure our residents are up to date on their vaccination status.

Aside from medical care, Westminster offers a Fit Minds class for residents that provides extra cognitive stimulation through group activities, education about brain health, puzzles and games. This curriculum is in addition to the plethora of activities offered at Westminster as part of our emphasis on continuous learning, entertainment and pleasure.



“I love coming to work each day and enjoy my interaction with co-workers and residents who rely on us for care. It’s an honor to work at a nationally recognized community where we know we are making a positive difference in the lives of hundreds of residents.”

~ Anthony, CNA

## Fine Dining

Food and fellowship are practiced together at Westminster. Westminster is fortunate to have outstanding food service staff, including more than a hundred full-time kitchen and front-of-house employees, as well as high school students in training. Developing menus that are nutritious, tasty, diverse, and satisfy hundreds of residents is no small undertaking.





## Wine Pairing Dinner Helps Fund Good Causes

The Westminster Residents Association (WRA) raises money for resident projects and associate scholarships. In June, they hosted wine and food pairings with an art auction that raised \$12,000.









## Facilities, Grounds, Transportation & Security

The teams who manage our facilities and grounds are highly skilled and manage a large portfolio of infrastructure projects every year.

- Refurbished 43 residences
- Purchased a hybrid wheelchair van to add to our fleet
- Expanded the keyless entry security system
- Remodeled the Arbour Healthcare Center
- Redecorated the Windsor Marketing Lobby
- Upgraded kitchen appliances in the Bistro and Laurel Dining Room
- Installing new chill pipe in the Preston
- Continuing to expand WiFi







^ Above, from left

Tessa Gonzalez, Public Relations Manager

Kim Rees, Residency Counselor

Jordan Bleecker, Director of Sales & Marketing

Carla Dubois, Residency Counselor

## Marketing & Sales

Much of 2023 was spent preparing the 43 new residences available in Westminster's third building, The Carlisle, that sold out while under construction. Preston and Windsor buildings sold above expectations, as well.

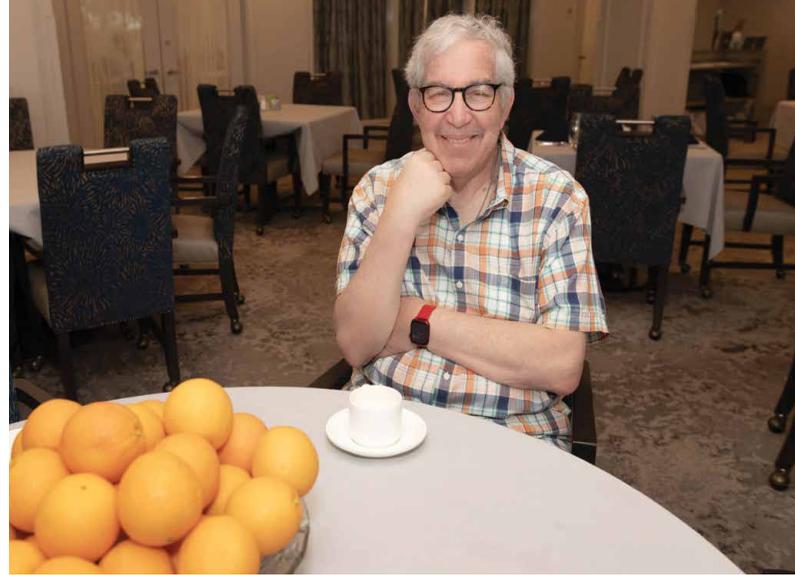


End-of-year occupancy for Independent Living holds steady at **93%**

Westminster's 2022 Annual Report, "Live Your Best Life," won a bronze award from *Mature Media*.



Check out our new website at [westminsteraustintx.org](https://westminsteraustintx.org) and then give us a call to schedule a tour - (512) 454-4643.



# Financial Data & Disclosures

Fitch BBB Rating (Positive)

Debt Service Coverage Ratio: 3.09

Days Cash on Hand: 1,017

Deficiency-Free Financial Audit

Deficiency-Free 403(b) Audit



# Occupancy Rates

Average monthly totals as of December 31st, 2023

## HEALTH CENTER

Total Beds	85.00
Beds Occupied	69.61
% Occupied	81.90
Private Pay	15.42
Permanent Life Care	30.26
Temporary Life Care	5.61
Medicare	13.90
HMO	4.42

## INDEPENDENT LIVING

Total Units	376.00
Units Occupied	347.00
% Occupied	92.30

## ASSISTED LIVING

Total Units	36.00
Units Occupied	32.00
% Occupied	88.90

## MEMORY SUPPORT

Total Units	38.00
Units Occupied	21.00
% Occupied	55.30



# 2023 Unaudited Operating Statement

## NATURAL ACCOUNT YTD ACTUAL

NATURAL ACCOUNT	YTD ACTUAL
<b>Operating Revenue</b>	<b>\$</b>
Total Independent Living Revenue	23,730,290.30
Total Health Center Revenue	6,446,097.84
Total Assisted Living Revenue	1,893,041.32
Total Memory Support Revenue	755,655.69
Total Clinic Revenue	422,322.12
Total Other Operating Revenue	64,611.33
<b>Total Operating Revenue</b>	<b>33,312,018.60</b>

## NATURAL ACCOUNT YTD ACTUAL

NATURAL ACCOUNT	YTD ACTUAL
<b>Operating Expenses</b>	<b>\$</b>
Total General and Admin Expense	6,981,160.38
Total Plant Expenses	5,003,365.63
Total Environmental Service Expense	2,078,907.05
Total Food & Beverage Serv. Expense	9,195,256.03
Total Resident Services Expense	1,441,354.69
Total Health Center Expense	7,538,747.89
Total Assisted Living Expense	1,664,906.55
Total Memory Support Expense	576,434.85
Total Community Home Health Expense	119,823.94
Total Clinic Expense	538,741.26
<b>Total Operating Expense</b>	<b>35,138,689.27</b>

**NATURAL ACCOUNT      YTD ACTUAL**

<b>Other Income</b>	<b>\$</b>
Amortization Income	3,808,629.50
Entry Fee Income - Death	1,550,365.30
Entry Fee Income - Move Out	(237,233.99)
Entry Fee Income - Cancellation	18,500.00
Entry Fee Income - Up & Downgrades	17,500.00
Apartment Custom Work	186,071.84
Gifts & Contributions	27,629.25
Interest Income - Non-Operating	2,746,021.28
Gain/Loss on Sale of Investments	(421,420.23)
Unrealized Gain/Loss on Investments	11,371,738.80
Gain/Loss on Sale of Assets	268,590.92
Misc. Income	191,049.12
<b>Total Other Income</b>	<b>19,527,441.79</b>

**NATURAL ACCOUNT      YTD ACTUAL**

<b>Other Expenses</b>	<b>\$</b>
Depreciation Expense	3,906,017.08
Interest Expense - Non-Operating	4,994,468.70
Financing Costs Amortization	(345,278.66)
Professional - Non-Operating	26,402.90
Misc. Expense	2,275.51
<b>Total Other Expenses</b>	<b>8,583,885.53</b>

<b>Summary</b>	<b>\$</b>
<b>Net Operating Income</b>	<b>(1,826,679.67)</b>
<b>Total Other Income</b>	<b>19,527,441.79</b>
<b>Total Other Expenses</b>	<b>8,583,885.53</b>
<b>Net Income/(Loss)</b>	<b>9,116,876.59</b>

## BOARD OF DIRECTORS

### 2023/24 BOARD MEMBERS

David E. Redding, Chair

Diane Williams, Vice Chair

Stephen Y. Scurlock, Secretary

Alexandra Albright

Michael Chauncey Day

Dr. Diana DiNitto

Paul. E. Hilgers

Richard Luevano, Jr.

Nick Moore

Buzzy Woodworth

### RESIDENT BOARD MEMBERS

Camille Miller,  
President of Resident's Association

Jim Woodrick, Resident

Robert Rutishauser, Resident

### LEGAL COUNSEL

Kevin Reed,  
Reed, Claymon, Meeker & Hargett



“Westminster continues to be a shining star in the retirement community space, due primarily to our amazing leadership and staff and, of course, our residents. We have accomplished much in the past year, including the completion of the Carlisle building and welcoming many new residents to our community.

In addition, the Westminster

Board of Directors, in collaboration with the leadership team and LCS, engaged in a comprehensive strategic planning session to identify ways we can continue to be the best in class among continuing care residential communities.

There is still much to do, and we are always looking for ways to create better experiences for our residents. But, we plan to catch our breath first. We want to thank our residents, their families, and our associates for their patience and understanding as we continue to improve this wonderful landmark.”

~ David E. Redding, Chair







**WESTMINSTER**<sup>SM</sup>  
AN AUSTIN ORIGINAL

4100 JACKSON AVE AUSTIN, TX 78731

(512) 454-4711

[WWW.WESTMINSTERAUSTINTX.ORG](http://WWW.WESTMINSTERAUSTINTX.ORG)

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