



How Philanthropy Can  
Transform Your Community

# About Asbury Foundation

- Value Proposition: Aligning donor passion with transformational opportunities
- Mission: Enhancing the lives of persons served by Asbury
- 501(c)(3) with Candid Platinum Seal of Transparency

## **J.D. Shuman, President & CEO**

- 23+ years serving older adults
- 15 years with Asbury Foundation





**MISSION**

Exploring possibilities to live your best life

**DIVERSIFIED AGING SERVICES**

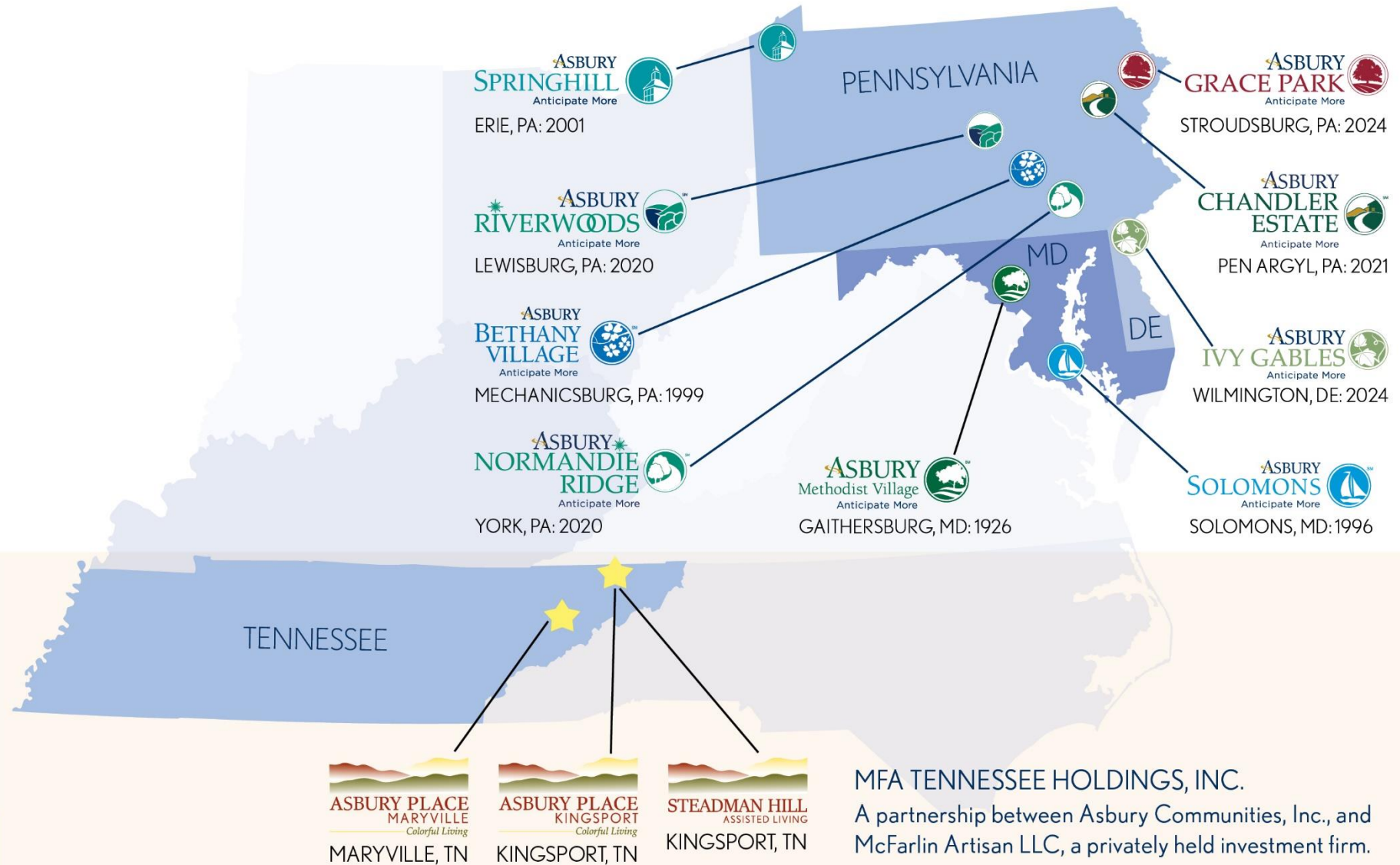
- Albright LIFE Centers (Programs for All-Inclusive Care for the Elderly)
- Albright Pharmacy Services
- Edge Therapy Solutions
- HUD Affordable Senior Housing
- ThriveWell Tech



A 501(c)(3) non-profit organization securing philanthropic support for benevolent care and transformational opportunities for residents of Asbury Communities.

**LEARN MORE AT ASBURY.ORG**

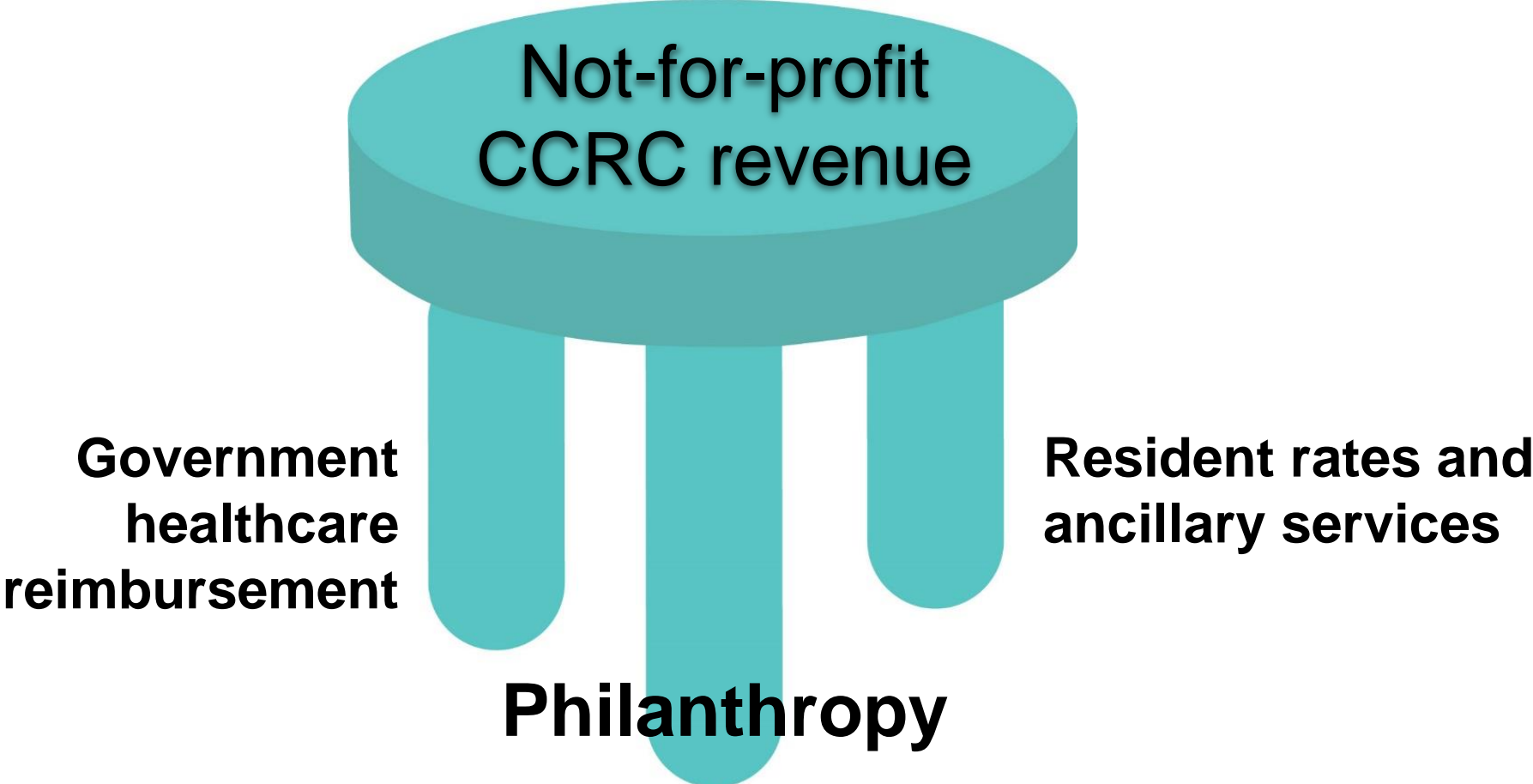
**Asbury Communities Inc.** is the 14th-largest not-for-profit system of continuing care retirement communities, as ranked in the LeadingAge Ziegler 200, and includes diversified senior living options and aging services.



**MFA TENNESSEE HOLDINGS, INC.**

A partnership between Asbury Communities, Inc., and McFarlin Artisan LLC, a privately held investment firm.

# Leveraging Philanthropy to Achieve Goals



# Board Strategic Re-Assessment

2019

- Foundation Assessment
- Good to Great

2020

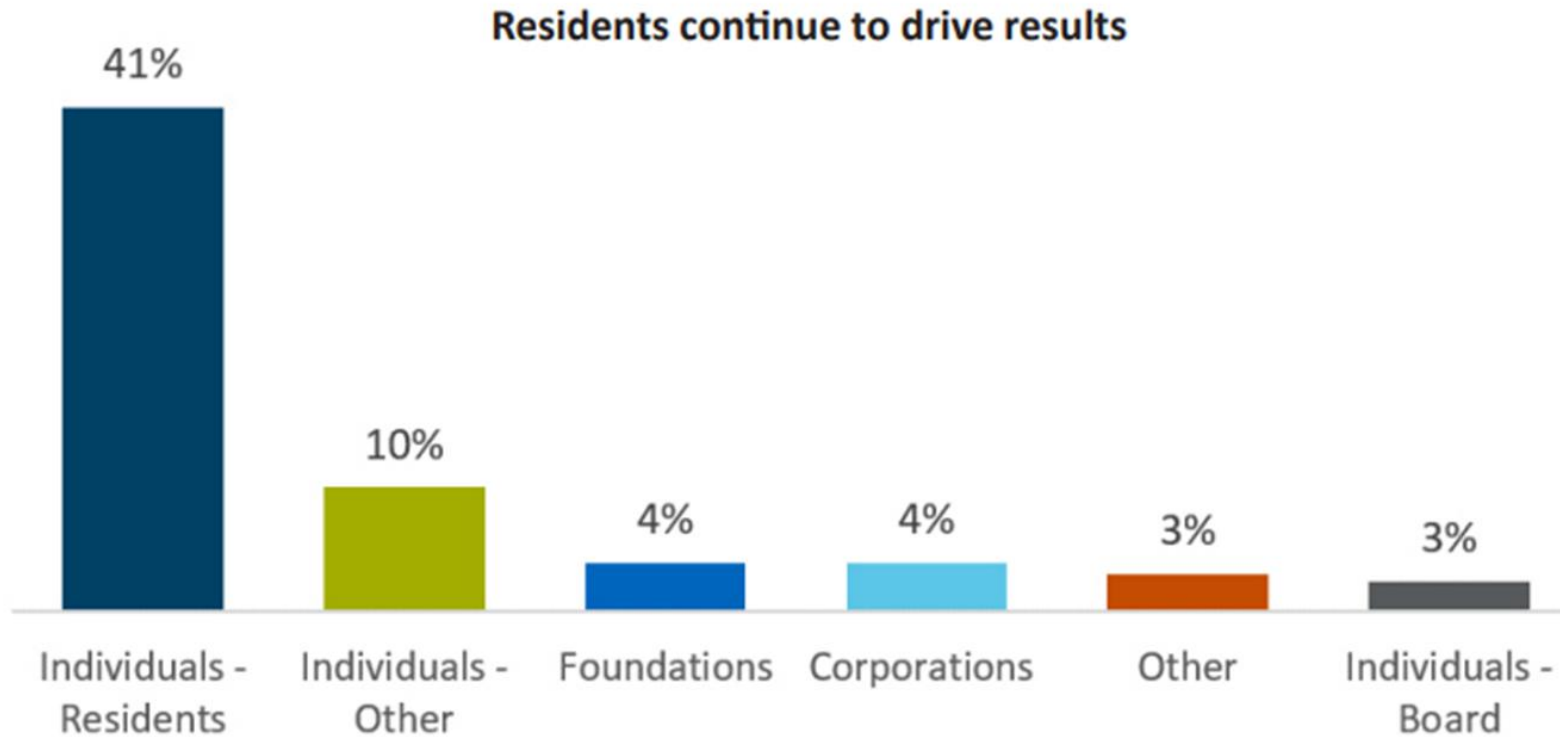
- Philanthropy In Aging Services
- September Board Retreat

# Our Challenge

- Foundation's 'Brand' was equated with benevolent care
- Significant philanthropic opportunities that could benefit residents in a different way were going elsewhere
  - Alma Mater
  - Kids/Grandkids College
  - Michael J. Fox Foundation
  - Alzheimer's Association
  - SPCA/Humane Society



# PASS - Residents Invest in Their Home

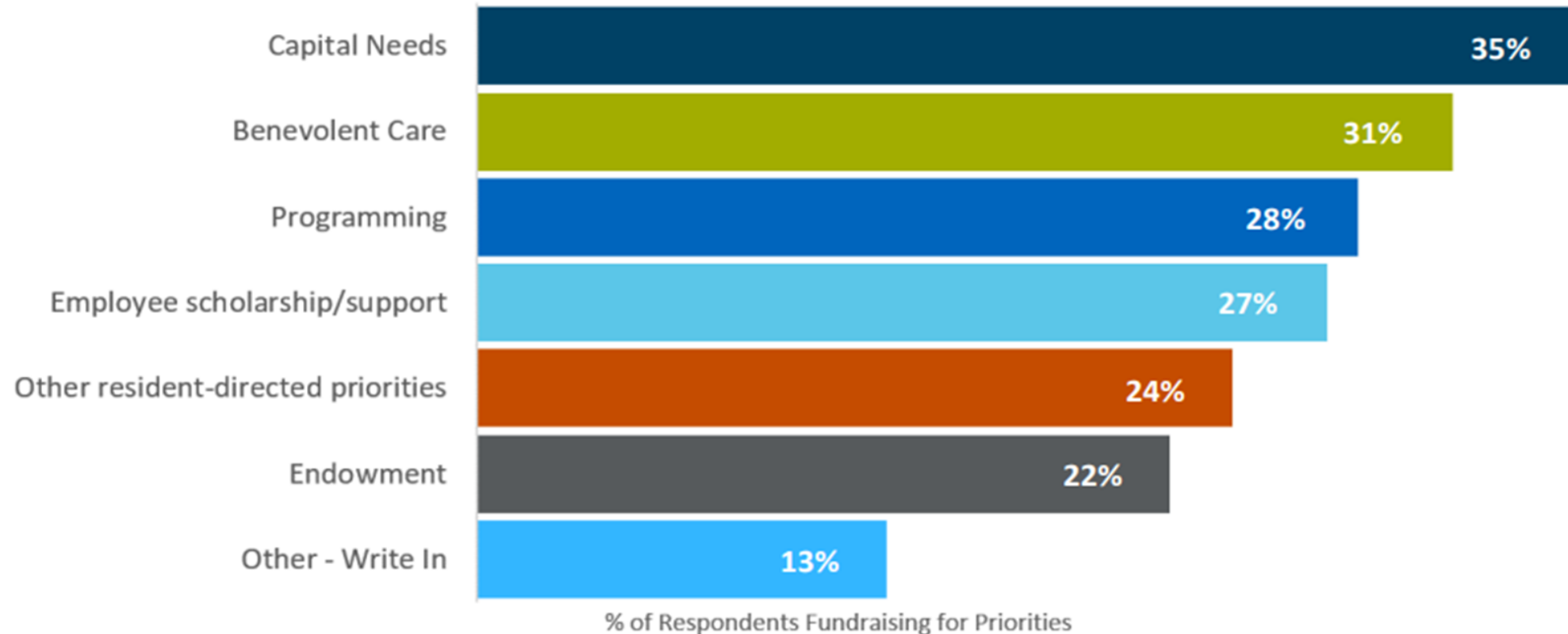


*Medians were calculated independently for each donor category and therefore do not total 100%*

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# PASS - Residents Invest in Their Home

## Capital needs outpace benevolent care



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# PASS – Foundation/Development ROI

3.48 = Median

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# The Power of Alignment

## STRATEGIC FOCUS AREAS

*Asbury is a...*



“well-being”  
destination  
communities



diversified  
aging services  
organization



leader in healthcare  
technology solutions



high-performing  
organization

# Key Focus Areas Support Asbury Strategy

- *New Strategic Framework aligns donor passions with key Focus Areas in Asbury Communities Strategic Blueprint*



Benevolent  
Care



Innovation



Scholarships,  
Education,  
and Support

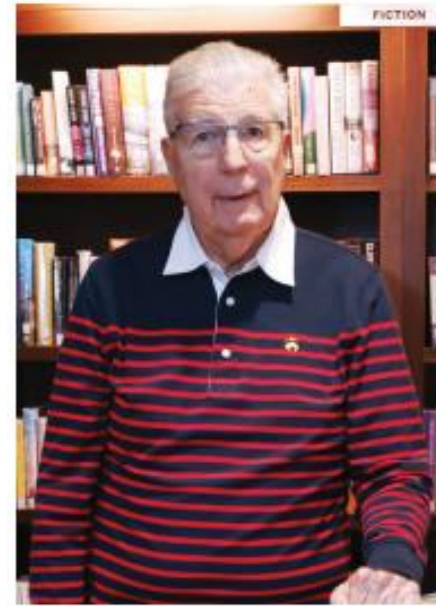
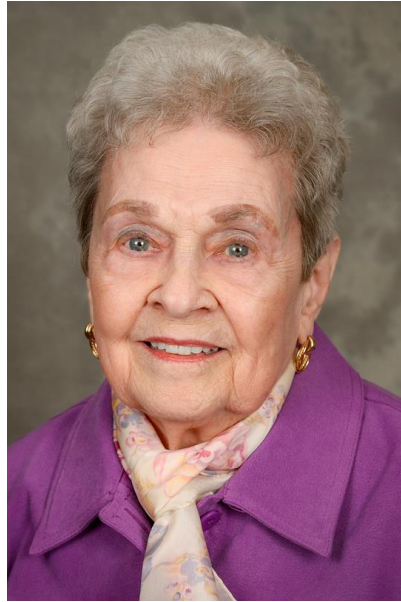


Capital  
Projects



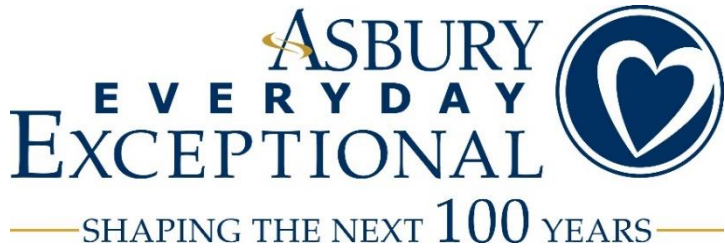
Special  
Programs

# Strategic Plan – Leaving a Legacy



From 2019 to 2023, endowments grew from 7 to 37

# Strategic Plan & Centennial



## BENEVOLENT CARE

*Honoring the Dignity of Every Asbury Resident*

\$24M

## SCHOLARSHIPS & EDUCATION

*Celebrating and Investing in Our Associates*

\$5M

## SPECIAL PROGRAMS

*Uniting Opportunity and Passion*

\$8M

## CAPITAL PROJECTS

*Elevating the Day-to-Day Living Experience*

\$19M

## INNOVATION

*Using Technology to Enhance Health and Wellness*

\$2M

## THE ASBURY FUND

*Supporting Mission Areas of Greatest Need*

\$2M

## TOTAL SYSTEM-WIDE CAMPAIGN GOAL

\$60M

# Donor Passion Drives Results

2019	\$4.9M
2020	\$4.1 prior to Strategic Plan approval \$2.9M raised in 4 months after approval
2021	\$11.6M
2022	\$10.7M
2023	\$12.3M



# Transformational Gifts in Action

- Brain health technology and capital projects
- Intergenerational programs
- Well-being spaces and special programs
- Dining and other amenities
- And more!



# Thank you!

J.D. Shuman

President and CEO

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