

MLRA Meeting-March 17, 2014

Jane Weston

Director of Development &
Community Relations

Philadelphia Yearly Meeting, Faith & Practice

“We know ourselves as individuals, but only because we live in community. Love, trust, fellowship, selflessness are all mediated to us through our interdependence. We cannot act without affecting others and others cannot act without affecting us. We know ourselves as we are reflected in the faces, action and attitudes of each other. “

Areas of Focus:

- Fund Development
- Community Relations
- Barton Arboretum & Nature Preserve
- Ken Hutz, Arborist Consultant

Fund Development

- Work with Estaugh Board Development Committee:
 - Davis Henderson, Chair
 - Patricia Meller, Estaugh Board Member
 - Lucienne Beard, Alice Paul Institute, Executive Director
 - Ruth Gage, Lumberton Resident
 - Jean Stratton, Medford Resident
 - Jeremy Vickers, Staff
 - Jane Weston, Staff

Ways People Support Medford Leas

- Recognition of the many ways individuals support Medford Leas:
 - Financial support
 - Gifts of wisdom, vision
 - Gifts of time-volunteerism
- Estaugh Board, Medford Leas Residents, Medford Leas Staff, local community all support Medford Leas in a number of ways based upon abilities.

Case Statement-It's All About Community

- Why give to Medford Leas?
- Gifts and bequests of all sizes benefit Medford Leas to serve current and future residents in serving our Mission
- Areas of focus in the near future:
 - Residents Assistance Fund
 - Estaugh Redevelopment
 - Arboretum Fund

Total Financial Giving to Medford Leas

- FY 2013:
 - Number of Gifts: 279
 - Amount of Gifts: \$1,002,510
- FY 2014: Through February 28, 2014
 - Number of Gifts: 234
 - Amount of Gifts: \$1,557,273

Gifts of all Sizes

- Gifts ranged from \$5-\$700,000
- All gifts impact services for current and future residents.
- Recognition that individuals contribute at the level they are able.
- Recognition that Planned Gifts make significant impact.

Where the Gifts Came From:

- Donation of Cash/Checks
- Planned Giving
- Other

Donations of Cash/Checks

- Resident Donations
 - “Honor of/Memory of”
 - “With Thanks/In Celebration”
 - Contributions
 - Monthly Billing Donations
- Estaugh Board Member Donations
- Annual Appeal
- Family/Friends-”In Honor of/Memory of”

Planned Giving-Holly Society

- Charitable Gift Annuity
- Trusts Distributions
- Bequest by Will
- IRA Distributions

Other Donations/Gifts

- Employee Matching Gift Programs
- Grants
 - D'Olier Fund—Hearing Loop
 - NJ Garden Club-Ground Cover-Katzell Grove

Next Steps:

- Host educational programs for residents on the benefit of planned giving to Medford Leas for yourselves and the community.
- Host educational programs for professionals—Estate Attorneys, Financial Planners to let them know about Medford Leas areas of focus/needs.

Community Events

- Events support and highlight areas of focus:
 - Evening in the Arboretum-April 26, 2014
 - Golf Outing-October 6, 2014
- Many ways to participate—attend event, bring a friend, family member, and/or consider a donation in support of event.
- Craft Fair-December 6, 2014-Resident Organized

Community Relations

- Local community groups
- Represent Medford Leas in the broader community
- Arboretum Visitors/Tours
- Press Relations
- Pathways to Learning

Local Community Groups

- Thirty groups meet at Medford Leas on a regular basis:
 - Medford & Lumberton Campuses.
- Examples: Pinelands Garden Club, South Jersey Apple Users Group, South Jersey Camera Club, PEO, Quaker Monthly Meeting Committees, Berry Basket Quilters, Mt. Holly Garden Club.
- Wonderful introduction to Medford Leas residents, staff and community.

Represent Medford Leas in the broader community:

- Medford Business Association
- Garden State Gardens
- Greater Philadelphia Gardens
- Speaking Engagements
 - Moorestown Rotary Club
 - Marlton Garden Club
 - Medford Senior Group
 - Other groups? Let me know!

Arboretum Tours & Visitors

- Host various groups at Medford Leas for Arboretum Program and Tours
 - Master Gardeners
 - Garden Clubs
 - Horticultural Groups
 - Church Groups
 - School Groups

Press Relations

- Medford Leas has become known to local media as a hub of interesting activities and individuals.
- Resident Features
- Arboretum Features
- Pathways Features
- Upcoming Feature—Burlington County Times—Aging

Pathways to Learning at Medford Leas-History

- MLRA-Long term interest in Lifelong Learning.
- History-Elderhostel Relationship:
 - 2007-2011
- Pathways to Learning-conceived Fall 2012
- Work with Steering Committee of Residents
- Fall Season 2013-hosted over 600 visits from the local community.

Pathways to Learning at Medford Leas-Current/Future

- Entering fourth season
- Opening up of MLRA programming has been very positive.
- Join us—bring a friend!
- Planning now for Fall 2014 Season

Barton Arboretum & Nature Preserve

- Arboretum Oversight Committee
- Day to day operations
- Arboretum Sub-Committee
- Completed Improvements
- Improvements in Works
- Out and About in the Arboretum!
- Ken Hutz, Arborist

Arboretum Oversight Committee

- Estaugh Board Committee
- Meets quarterly
- Susan Cunningham, Chair
- Members of Committee:
 - Residents-Medford Campus
 - Residents-Lumberton Campus
 - Medford Leas Staff
 - Professionals
 - Morris Arboretum

Day to Day Operations

- Bill Murphy, Director of Operations
- Work orders to Bill- distributed for completion, or refers to Arboretum Sub-Committee for input.

Arboretum Sub Committee

- Landscape Assessment-Spring 2012
- Committee formed in 2013 to prioritize and act upon recommendations in the Report
- Blended committee: Residents, staff, professionals
- Meets monthly

Recent Improvements

- Katzell Grove
- Meditation Garden
- Tree signs at Lumberton
- Courtyard Garden Renovations:
 - Complete: Court 26 And 28
 - Partial Renovations: 9, 13

Upcoming Improvements

- Lumberton Meadow
- Tree Replacements/Wish List
- Review of Courtyard Gardens—for improvements
- Healing Garden as a component of Estaugh Redevelopment
- Pinetum—post Estaugh Redevelopment Construction
- Arbnet Accreditation Application

Out and About in the Arboretum!

- Origin
- Email to Staff
- Weekly Calendar
- Arboretum Website
- Ideas are welcome!

Thank You!

Questions/Comments?