



IMPACT REPORT

July 2021-June 2022



MESSAGE FROM LEADERSHIP

Every investor, from the corner grocer to the most generous philanthropist in the city, is concerned about ROI (return on investment). It is important to measure investment against returns and input against impact. After experiencing every aspect of operations at LIFESPAN Services over the past 4 years, I am pleased to report that every dollar spent yields maximum returns, not only in financial requisites, but more importantly in terms of human capital.

We are the “employer of choice” for just under 400 employees; 85% of which are employed full-time with benefits. Our employees, who we call Ambassadors, provide compassionate care for nearly 1,500 individuals with intellectual and developmental disabilities across 23 North Carolina counties who call us their “provider of choice”, resulting in life-changing growth for the individuals.

This Impact Report is a snapshot of ROI for fiscal year 2021-2022, but more than simple ROI, it demonstrates impact- real, life-changing impact- and there is no greater return on investment. Early in my tenure at LIFESPAN Services, I realized at the core of every individual’s wish is the desire to experience the “precious ordinary” of life. This team of LIFESPAN Ambassadors moves mountains to honor that desire and fulfill those wishes, just like we’ve been doing for the last 50 years.

As a nonprofit, an employer, and provider, we are part of something larger than ourselves and the impact (ROI) is monumental. But we cannot do it without your support. Thank you for partnering with us in our mission to illuminate the abilities of the children and adults with disabilities. Your generosity allows these individuals to gain education, employment and enrichment opportunities enabling them to live, work and play in their communities throughout their lifetimes.



Ken



KEN D. FUQUAY

President & CEO



ABOUT LIFESPAN

History & Mission

LIFESPAN Services was founded in 1973, in response to five children with disabilities being excluded from attending public schools in Charlotte, NC. Recognizing the needs and potential of these children, a group of concerned parents and citizens joined forces and created an educational day program at St. Mark's Lutheran Church.

Word of the program and its positive impact spread, and with it the need for additional space and resources. In 1980, what had become St. Mark's Center moved to its own facility, expanded its programming to include adults with disabilities and started outreach beyond Charlotte.

In 2000, the organization was renamed LIFESPAN Services to better reflect its offering of support and opportunities for people with intellectual and/or physical disabilities throughout their lives.

EMPLOYER OF CHOICE

In 2021, as part of its Strategic Vision, LIFESPAN set a goal to become the "employer of choice" in the I/DD Sector. Reaching this goal means becoming a highly sought-after organization with strong leadership, competitive pay, engaged workers, meaningful work, and an inviting culture where employees (ambassadors) are excited to come to work. We strive for our ambassadors to have a sense of accomplishment, pride, and worthiness as they engage the mission of LIFESPAN Services.

How will LIFESPAN Services become the employer of choice? Below are initiatives to help reach this goal by 2024, many of which have already been accomplished.

- Roll out an increase in salary and wages
- Offer health benefits
- Provide LIFESPAN swag to all ambassadors
- Establish year-end and holiday celebrations
- Create an ambassador development series for nonmanagement members
- Initiate recruiting efforts targeting higher-learning institutions
- Implement a leadership learning series for managers
- Create a full-day leadership conference for all management employees
- Establish a 457b retiree benefit plan for executives
- Provide company vehicles for leadership

LIFESPAN's mission and passion is to illuminate the abilities of children and adults with disabilities by providing education, employment and enrichment opportunities to live, work and play in their communities throughout their lifetimes.

Currently LIFESPAN works everyday with more than 1,500 individuals of all ages, helping them experience the precious ordinary the rest of us take for granted. LIFESPAN is a "first-time" organization, helping individuals experience many firsts, such as first steps, first jobs, first independent bus rides and more, through more than 100 programs and services in 20+ counties in North Carolina.

Vision

Our vision is that every individual we serve, regardless of their abilities and every LIFESPAN ambassador has the resources they need to flourish and be the best version of themselves.

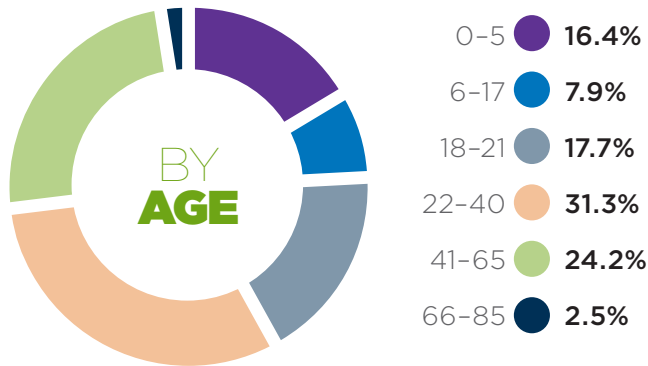
How will we determine success?

- Reduced employee turnover
- Improved job satisfaction
- Reduced job vacancy

The next task is to create a culture of empowerment with initiatives beginning in 2024.

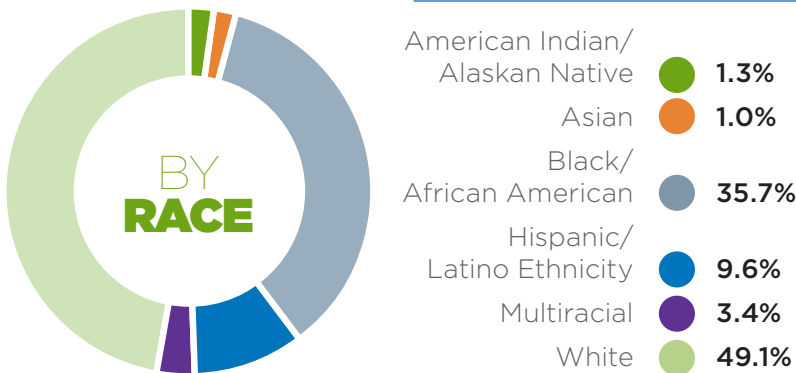
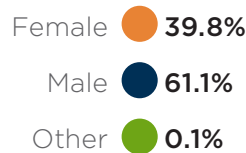


TOTAL SERVED
1,575



BY AGE

BY GENDER



BY RACE

Summary of IDD

Intellectual & Developmental Disabilities (IDDs) are differences that are usually present at birth and that uniquely affect the trajectory of the individual's physical, intellectual, and/or emotional development. Many of these conditions affect multiple body parts or systems

Intellectual disability starts any time before a child turns 18 and is characterized by differences with both:

- Intellectual functioning or intelligence, which include the ability to learn, reason, problem solve, and other skills;
- and*
- Adaptive behavior, which includes everyday social and life skills.

100%
of individuals served by LIFESPAN have an IDD diagnosis.

Most common conditions that are considered IDD, and percent of LIFESPAN individuals with that diagnosis:

Autism Spectrum Disorder - 20.9%

Down Syndrome - 3.4%

Cerebral Palsy - 4.2%

Other Genetic or Chromosomal Disorder - 4.4%

General Intellectual or Developmental Disorder - 63.3%

Many LIFESPAN individuals face challenges in addition to IDD:

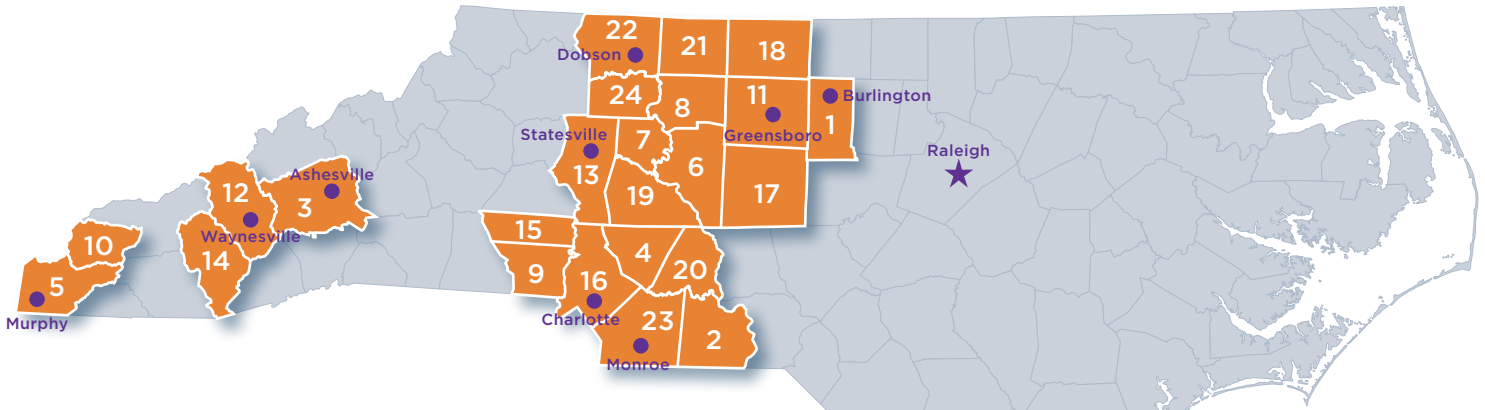
Mental Health

Anxiety

Depression

Attention Deficit Disorder

SERVICES BY COUNTY



- | | | |
|------------|----------------|---------------|
| 1 Alamance | 9 Gaston | 17 Randolph |
| 2 Anson | 10 Graham | 18 Rockingham |
| 3 Buncombe | 11 Guilford | 19 Rowan |
| 4 Cabarrus | 12 Haywood | 20 Stanly |
| 5 Cherokee | 13 Iredell | 21 Stokes |
| 6 Davidson | 14 Jackson | 22 Surry |
| 7 Davie | 15 Lincoln | 23 Union |
| 8 Forsyth | 16 Mecklenburg | 24 Yadkin |

Employment
 Education
 Enrichment

“ The biggest feeling I had after moving Mary Ann to LIFESPAN’s Oak Street home was relief. I felt that she was safe and as I got to know the staff, I realized what a loving and caring environment it truly is. The other residents seem to love each other and Mary Ann. It really feels like Mary Ann’s home to me. ”

JIM MCDONNELL,
FATHER OF MARY ANN



WHAT WE DO EDUCATION



LIFESPAN Services provides the highest quality educational programs for children with developmental disabilities and we believe that all children, regardless of ability, should have the opportunity to learn together. We have devoted ourselves to implementing this philosophy in all aspects of our educational programs.

Education Programs & Services

Early Learning Centers

5-star rated child care centers serving children with intellectual and developmental disabilities and typically developing children from age 6 weeks to 12 years. This environment allows children to participate in the same routines and play experiences and learn how to value and appreciate individual strengths and differences.

We also offer inclusive summer enrichment and afterschool programs for children ages 5 to 12 years.

Special Instruction Services

Early intervention services to address the needs of children ages 6 weeks to 3 years of age who are at risk of developmental delays or disabilities. These services are provided in their homes or community setting.

Occupational & Speech Therapy

Offering evaluation and treatment by licensed Speech Therapists for children from birth to 12 years of age.



BURLINGTON EARLY LEARNING CENTER

Our Burlington Early Learning Center celebrated 10 children on their Pre K graduation, a significant milestone in their educational journey. The event brought together families and staff in a joyous celebration of the children's hard work and dedication. Three of the children had been with the program since they were infants, making the day all the more special.

The graduation marked the end of a chapter and the beginning of a new one, filled with excitement and possibility. For the families and staff, it was a moment of reflection on the growth and progress of the children over the years. The impact of the program was clear, as evidenced by confident children who were ready to move on to the next phase of their education.



JOSH'S STORY

Josh moved into one of LIFESPAN's Alternative Family Living (AFL) Homes in May 2022 and one of his goals was to maintain a healthy lifestyle. Over the past year he followed a healthy diet and began weekly exercise programs such as going to the gym and the pool for swimming. Overall, he lost a total of 60 pounds, lowered his medications, and dropped his A1C to a healthy level.

During his time with us, he also learned to overcome many fears. He was once fearful of all animals, especially birds and dogs, but with support from Hunter, Josh's AFL Ambassador, he was able to break his fear. Today, Josh has his own pet dog and he went on his first ever beach trip after overcoming his fear of seagulls!

Josh's Autism used to limit what he was able to do but now he has started learning to communicate with others and has had many first-time experiences thanks to his new living situation with LIFESPAN. He is a very happy person who loves being out in his community!

WHAT WE DO ENRICHMENT



LIFESPAN Services is committed to enhancing the quality of life of every individual we serve by providing them with meaningful choices, community engagement, and by empowering them to be as independent as possible.

Enrichment Programs & Services

Adult Day Enrichment

Creative Centers where adults with disabilities are offered an array of engaging and enriching classes and activities. Curriculums are based upon the interests and goals of the individual we support. Individuals may also receive these services combined with community based activities, volunteer and employment opportunities.

Residential Services

Providing community living in a group home setting.

Alternative Family Living

Enabling individuals to live with families in the family's home.

Respite Care

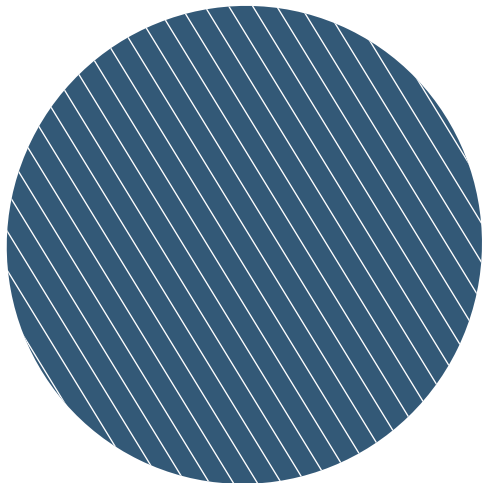
Providing short-term relief for primary caregivers.

Mosaic: A LIFESPAN Studio

Offering an inclusive art studio environment.

Peer Support Service

This is a recovery-focused service that empowers individuals to manage their own recovery from a diagnosed substance use, mental illness, and/or experiencing homelessness.



WHAT WE DO EMPLOYMENT



Whether teaching basic job skills or the importance of staying on task, LIFESPAN Services vocational programs for adults provide the maximum opportunity for individual success. And, due to our diversity of customers and contracts, we are able to offer paying jobs suited to unique skills and interests.

Employment Programs & Services

Community Employment Services

In conjunction with community partners, we provide opportunities for adults with disabilities seeking employment in a positive work environment

This service includes:

- Skill Assessment,
- Social Skill Training,
- Job Development,
- On the Job Training, and
- Long Term Support.



ZACHARY'S STORY

Zachary enrolled in LIFESPAN's Community Engagement and Supported Employment program in December 2021, with a clear goal in mind and a desire to change his life for the better. By early February 2022, he was putting his skills and determination to the test as a bagger at Harris Teeter. He was determined to prove himself and make a positive impact.

A year has passed since then and Zachary is now a beloved member of the Harris Teeter family. He works four days a week and truly enjoys

helping customers every day. His managers are impressed with his work and the service he provides, and his coworkers love working with him. He's even earning above minimum wage and gets a discount on items he wants to purchase. Zachary is proud of the progress he's made and grateful for the opportunities he's been given. His story is a true inspiration and a testament to the power of hard work and determination.



FUNDRAISING EVENTS

TOP GUN CLAY SHOOT EARLY NOVEMBER

Join us for a morning of friendly competition. A team consists of 4 participants.



CASINO NIGHT FEBRUARY/MARCH

Come take your chances at being a high roller at the casino tables or dance the night away.

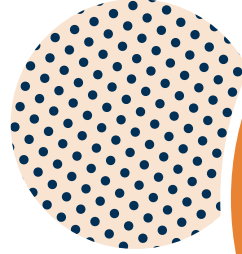


CLASSIC GOLF TOURNAMENT

We are hosting our first Golf Classic Tournament being held in the heart of Charlotte at Cedarwood Country Club. The event will be a 4-player scramble with a shotgun start at 1 p.m.



HOW WE
MAKE AN IMPACT



100,920

hours of inclusive
childcare are provided
by LIFESPAN'S Early
Learning Centers annually

255

families can go back to
work or attend school
thanks to our Early
Learning Centers



**MARDI GRAS
CASINO NIGHT**

98.6%

satisfaction in
annual survey



32

individuals live
full-time in
LIFESPAN
Group Homes



8,400

pounds of clay were used to create amazing pieces of art through our MOSAIC Art Program

683

individuals participate in community programming

150

individuals started a new job with assistance from LIFESPAN job coaches

153

individuals were able to retain their job for another year

428

individuals participate in Enrichment Activities daily



FINANCIAL SUMMARIES 2021-2022

Public
Support

| REVENUE | TOTAL | % OF TOTAL |
|-----------------------------|---------------------|-------------|
| Donations | \$430,162 | -- |
| Grants | \$430,299 | -- |
| Events | \$275 | -- |
| Total Public Support | \$860,736 | 4.4% |
| Program Revenue | \$18,089,440 | 93.4% |
| Investments | \$254,375 | 1.3% |
| Rental Income | \$80,811 | 0.4% |
| Other Income | \$83,529 | 0.5% |
| Total Revenue | \$19,368,891 | 100% |



EXPENSES

| EXPENSES | TOTAL | % OF TOTAL |
|-------------------------------|---------------------|-------------|
| Total Program Services | \$16,322,248 | 87.3% |
| Management & General Services | \$2,123,069 | 11.4% |
| Fundraising | \$252,571 | 1.3% |
| Total Expenses | \$18,697,888 | 100% |

WAYS TO GIVE

Meaningful collaborations bring us together to meet children and adults we serve where they are and give each of them the support they need to live fulfilling lives as members of our community. Our partners support LIFESPAN in a variety of ways, to ensure that everyone can support the individuals we serve in the way that works best for them.



ONLINE

Visit [LIFESPANServices.org](https://lifespanservices.org) to learn how your gift makes a lasting impact on the lives of individuals in our community. LIFESPAN is a not-for-profit organization under Internal Revenue Code Section 501(c)3. Tax ID 56-1142969



MONTHLY GIVING

With monthly and recurring giving you can provide year-round support and make a bigger impact for the individuals served. Monthly giving can be set up by going Online to lifespanservices.org/give-now or email knorton@lifespanservices.org



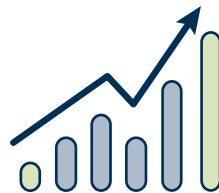
SPONSOR RECOGNITION

We offer companies opportunities to directly support the individuals we serve by supporting our signature events. Support of these events provides positive and measurable programs that enrich the lives of the individuals we serve.



RETIREMENT ASSETS

Properly structured retirement assets grow tax-free and for some community members, actually exceed actual needs. By designating LIFESPAN Services as a full or partial beneficiary, funds pass between accounts free of taxes.



STOCKS

Appreciated assets, such as common stock or mutual fund shares, can generate capital gains tax if sold. By giving them as a charitable gift, you avoid capital gains tax and receive a charitable tax deduction based on current market value.



CHARITABLE REMAINDER TRUST

A Charitable Remainder Trust establishes income for you and/or your beneficiaries. The income period can be a specified period of time under 20 years, or for the life of the income beneficiaries. The charity would then receive the remaining balance in the trust.



DONOR ADVISED FUND

A Donor Advised Fund (DAF) allows donors to make a charitable contribution, receive immediate tax deduction and then recommend grants from the fund over time.



WILLS/BEQUESTS

A bequest is a gift of assets or property to a beneficiary. It is the easiest gift to make with no or minimal out of pocket expense to establish and is revocable if you change your will prior to your death. Because a charitable bequest can reduce estate taxes, it often results in long-term tax benefits.



LIFE INSURANCE

By making a charitable organization the beneficiary of your life insurance, you retain lifetime ownership of the policy and also have the right to cash it in, borrow against it and make any policy changes over the lifetime of your policy.

Please reach out to the LIFESPAN Services Development Team to initiate your donation or for any questions:

Sara Trexler, Chief Philanthropy Officer, strexler@lifespanservices.org, (704) 634-6904

Ken Norton, Director of Individual Philanthropy, knorton@lifespanservices.org, (412) 477-9330





The LIFESPAN Services, Inc. Human Resources team did an AMAZING job putting the Leadership Conference together. It was fun, kept us engaged and was really informative. GREAT WORK!



ANITA WORD,
LIFESPAN AMBASSADOR

OUR AMAZING DONORS

To all of our amazing donors, thank you for providing the resources that empower LIFESPAN continue our mission of providing the resources that empower children and adults with disabilities by providing education, employment and enrichment opportunities to live, work, and play in their communities. We appreciate every individual and organization listed, because of these donations, we were able to accomplish amazing things this year.

\$10,000 +

- Bank of America
- Bill and Sharon Allen Family Foundation
- City of Statesville
- Kenneth Fuquay
- Terry Goble
- William C. and Norma C. Cannon Charitable Foundation
- The Mary E Carrick Foundation
- Blake Okland
- United Way of Iredell County
- Gerald and Nancy White

\$5,000-\$9,999

- Dale Jr, Foundation
- Dan and Linda Gordon Family Foundation
- Joseph B. Grady
- Glen Graves
- High Point Civitan Club Foundation
- HFCB
- David Lombardo
- Pinnacle Bank
- PAVCO
- Schwab Charitable Fund

UP TO \$4,999

- A & A Mechanical, Inc. DBA Heating & Air
- Michael & Shari Allen
- Ally Financial Inc. Corporate Citizenship
- Autobell Car Wash Inc.
- Marcie Bruton
- William R. Carson
- Carter Bank & Trust
- Steve Cherok
- Columbia Forest Products Foundation
- David Defehr
- Dustin Deal
- Susan Devore
- Enterprise Fleet Management
- Chris Ferrante
- Michael Fox
- David Glenn
- Healthgram, Inc.
- HH Webb & Nora Midkiff Webb Benevolent Trust
- ISU Ballantyne Insurance Group Inc.
- Ivan Hinrichs
- Jacob L. Mauney
- Steven Meckler
- National Christian Foundation
- Netsafe Technologies, Inc.
- Dan Richardson
- Don Ray
- Thomas Richards
- Pamela Rooney
- Mark Schneider
- Darrell Seals
- Jan Skinner
- Robert Spence
- Randolph Stephenson
- Michael and Laura Tate
- Harris Teeter
- Wilmar Leasing, Inc.
- Russell Zusi

LIFESPAN Stewardship Team



Ken Fuquay
President/Chief
Ambassador of
Empowerment



Donella Brown
Treasurer &
Chief Financial
Officer



Robin Devore
Chief
Compliance
Officer



Sara Trexler
Chief
Philanthropy
Officer



Barbara Wilson
Secretary &
Chief HR Officer



**Christopher
White**
Chief Operating
Officer

LIFESPAN Stewardship Team Senior Directors



Barbara Burke
Senior Director
Residential Services



**Dawn Ashby
Caldwell**
Senior Director Arts
& MOSAIC Studios



Lynn Crabtree
Senior Director
Education



Cindy Lowe
Senior Director
Facilities &
Programs



Alisha Tatum
Senior Director
Community
Programs



LIFESPAN Board of Directors

Carolyn Allison, Charlotte Community
Health Clinic

Robin Carson, VP Goodwill Industries, *retired*

Janet Fortner, Hospice Palliative Care Charlotte
Region CEO, *retired*

David Pardue, VP Asset Protection for
Harris Teeter, *retired*

Shay Prosser, Catapult

Malia Proveaux, Macon Valley
Nursing & Rehabilitation

Dan Richardson, HFCB

Dr. Ellen Sigler, Western Carolina University

Bob Spence, AeroMed Group

Evan Turtz, TRANE Technologies

Mary Vickers-Koch, Central Piedmont
Community College, *retired*

Jonathan Vogel, Vogel Law Firm, PLLC

Russell Zusi, Bank of America



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Social Media

[#AbilitiesIlluminated](#)

