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
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.
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
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
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.
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.

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!

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.

**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.

**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.
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.
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.
MAKE AN IMPACT

100,920 hours of inclusive childcare are provided by LIFESPAN’S Early Learning Centers annually.

98.6% satisfaction in annual survey.

32 individuals live full-time in LIFESPAN Group Homes.
153 individuals were able to retain their job for another year

683 individuals participate in community programming

8,400 pounds of clay were used to create amazing pieces of art through our MOSAIC Art Program

150 individuals started a new job with assistance from LIFESPAN job coaches

428 individuals participate in Enrichment Activities daily

8,400 pounds of clay were used to create amazing pieces of art through our MOSAIC Art Program
# Financial Summaries 2021–2022

## Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>Total</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donations</td>
<td>$430,162</td>
<td>--</td>
</tr>
<tr>
<td>Grants</td>
<td>$430,299</td>
<td>--</td>
</tr>
<tr>
<td>Events</td>
<td>$275</td>
<td>--</td>
</tr>
<tr>
<td><strong>Total Public Support</strong></td>
<td><strong>$860,736</strong></td>
<td><strong>4.4%</strong></td>
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<tr>
<td>Program Revenue</td>
<td>$18,089,440</td>
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<tr>
<td>Investments</td>
<td>$254,375</td>
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<tr>
<td>Rental Income</td>
<td>$80,811</td>
<td>0.4%</td>
</tr>
<tr>
<td>Other Income</td>
<td>$83,529</td>
<td>0.5%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$19,368,891</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th>Source</th>
<th>Total</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Program Services</td>
<td>$16,322,248</td>
<td>87.3%</td>
</tr>
<tr>
<td>Management &amp; General Services</td>
<td>$2,123,069</td>
<td>11.4%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$252,571</td>
<td>1.3%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$18,697,888</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
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.

Visit 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.

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.

CHARITABLE REMAINDER TRUST
A Charitable Remainder Trust establishes income for you and/or your beneficiaries. The income period an 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.
DONORS

To all of our amazing donors, thank you for providing the resources that empower LIFESPAN to 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 Carnrick 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

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 LEADERSHIP

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

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

LIFESPAN Stewardship Team Senior Directors

Barbara Burke
Senior Director Residential Services

Dawn Ashby
Senior Director Arts & MOSAIC Studios

Lynn Crabtree
Senior Director Education

Cindy Lowe
Senior Director Facilities & Programs

Alisha Tatum
Senior Director Community Programs