



## President, Foundation

### Leadership Profile

June 2026

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A decorative graphic consisting of numerous thin, overlapping, curved lines in shades of light blue and grey, creating a sense of motion and depth. The lines originate from the left side and curve towards the right, with some lines extending into the dark blue footer area.

**WittKieffer**

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## The Opportunity

Pacific Retirement Services, Inc. (PRS), a not-for-profit comprehensive senior care organization located in Medford, Oregon, seeks a visionary and values-driven leader to serve as the inaugural President, Foundation.

As a national not-for-profit leader in the senior living and healthcare industry, PRS' mission is "to empower people to lead meaningful lives as they age." This has driven PRS to develop, build, and operate first-class retirement communities in some of the best locations nationally. From urban settings in downtown Portland, Seattle, and Fort Worth to vibrant university towns like Tempe, Eugene, Albuquerque, Davis, and Madison, PRS's communities attract exceptional residents who want to remain active and engaged. PRS also delivers on its mission by providing safe, secure housing to low-income seniors, as well as overseeing a thriving network of older adult volunteers who provide much needed support to vulnerable populations throughout southern Oregon.

With revenues, both owned and managed of \$400 million, 12 Life Plan Communities and 25 affordable housing communities, PRS is in an active growth mode through mergers and acquisitions, most recently by affiliating with a group of communities formerly managed by the Haverland Carter Lifestyle Group, which added \$50 million in revenues, and \$200 million in assets.

Reporting to the President & CEO, the President, Foundation serves as the senior philanthropic leader for PRS, responsible for advancing a comprehensive fundraising strategy aligned with the organization's mission, strategic priorities, and long-term growth. This role will lead all aspects of philanthropic development.

The President, Foundation will foster a mission-driven, high-performing culture grounded in collaboration, accountability, and innovation, and serve as a visible ambassador for PRS. This leader will build strong relationships with executive leadership, the Board, residents, donors, and community stakeholders. In addition, the leader will develop and implement a diversified philanthropy strategy that strengthens donor engagement, increases retention, and drives transformational giving.

This new leader will establish the Foundation's operational infrastructure and build effective systems, performance management, and financial oversight. Key responsibilities for the role include defining metrics, monitoring outcomes, and ensuring alignment with donor intent through rigorous compliance and stewardship practices.

In close partnership with the Board of Directors, the President, Foundation will strengthen governance, engagement, and philanthropic alignment while elevating PRS' external presence. This leader will also leverage data and insights to inform strategy, identify opportunities and risks, and provide clear, actionable reporting to leadership and the Board.

The ideal candidate will bring strong business acumen, deep fundraising expertise, and a demonstrated ability to build and scale philanthropic programs. As the inaugural President, Foundation, the individual will combine strategic vision with hands-on action to establish high-performing programs that advance PRS's mission and long-term success.

## Organization Overview

PRS operates first-class Life Plan Communities in attractive locations, from active, urban settings like downtown Portland, Seattle, and Fort Worth to university towns like Tempe, Eugene, Davis, Albuquerque, and Madison. PRS offers market-rate housing for older adults and affordable housing for older adults and families through its Community Housing Division. Additionally, PRS offers management services for senior living organizations, investors, and developers. The Community Volunteer Network at PRS administers and coordinates volunteer programs for older adults in southern Oregon.

Established in 1991, PRS develops, operates, manages, and markets 37 retirement communities and organizations across seven states, plus several related nonprofit and for-profit companies. The corporation has 3,000 employees, provides housing to over 6,000 seniors, and serves an additional 4,000 seniors through volunteer programs.

Each PRS Life Plan Community offers a comprehensive wellness program that supports all six dimensions of wellness: physical, intellectual, emotional, spiritual, social, and vocational. There are routine events and community gatherings in the communities that create an opportunity to socialize with other residents. Each community has an indoor pool and fitness center and provides activities focusing on emotional wellness, such as yoga and Tai Chi. While services may vary by community, most PRS Life Plan Communities offer a full continuum of healthcare services that include assisted living, memory care support, and skilled nursing and rehabilitation.

### Pacific Retirement Life Plan Communities

At PRS, residents are provided opportunity, community, security, and stability. PRS has Life Plan Community affiliates in California, Oregon, Arizona, Wisconsin, New Mexico, Texas, and Washington. For specifics on each Life Plan Community, please see Appendix A.

#### Assisted Living

The assisted living program offers services in the residents' apartments and offers solutions to seniors who may need help with bathing, dressing and medication reminders.

#### In-Home Care

In-home care services allow residents to remain in their apartment while recovering from an illness or injury. In-home care is offered at: Cascade Manor, Capitol Lakes, Holladay Park Plaza, Mirabella Portland, and Rogue Valley Manor.

The below services are available:

- Personal care
- Bathing
- Cooking
- Help scheduling medical appointments
- Laundry
- Light cleaning
- Medication services
- Mobility and movement
- Nutrition
- Registered Nursing services
- Respite care
- Shopping
- Transportation assistance

#### Memory Care Support

A specialized Memory Support Program is another highlight of PRS' communities. Alzheimer's and other memory-impairing diseases can impact family members. Each community has specially trained staff, adaptive programs,

and a space to assist. Memory care support is offered at all communities except: The Peninsula Regent, Cascade Manor, and Holladay Park Plaza.

### Skilled Nursing and Rehabilitation

The on-site skilled nursing and rehabilitation center is staffed with professionals ready to offer a range of rehabilitation services, short-term nursing care, and long-term care. Skilled nursing and rehabilitation services are offered at all communities except The Peninsula Regent.

### PRS Management Inc.

Through PRS Management Inc., its subsidiary management company, PRS offers support and management services to its affiliates. From marketing and sales consulting to legal representation to recruiting and development services, PRS Management Inc. partners to evaluate operations, review management practices, and develop tailored plans to improve census and operational efficiency.

Some of the services PRS Management, Inc. offers include:

#### Services

- Operations and management
- Development
- Marketing
- Construction management
- Legal
- Financial management, planning, and reporting
- Public relations and advertising
- Consulting
- Affordable senior housing management
- Compliance and risk management

### Community Housing

PRS' Community Housing division manages 24 affordable housing communities that ensure seniors – regardless of their financial situation – can have a safe and comfortable place to call home. Located in Oregon, California, and Texas, these communities are further supported by the U.S. Department of Housing and Urban Development, which has given PRS superior management review ratings. In addition, PRS has a community that welcomes families in Medford, Oregon. Helping seniors and families create a stable and purpose-driven life isn't just what they say they do; it's what they actually do.

To be eligible for Community Housing, the requirements below must be met:

- The applicant or applicant's spouse must be 62 years of age or older — with the exception of Glenridge Terrace, Ross Knotts, and Donald E. Lewis, where exceptions apply.
- Applicant(s) must make less than the income limits set by HUD, which varies by location.

### Community Volunteer Network

The Community Volunteer Network is a not-for-profit organization that serves seniors in southern Oregon. The Foster Grandparent Program offers a multigenerational avenue for developing meaningful relationships, deep connections, and long-lasting shared experiences. Volunteer participants offer support, love, and wisdom to children and youth in Jackson, Josephine, and Klamath counties. In return for their services, they receive a modest hourly, tax-free stipend.

To learn more about the benefits and qualifications of being a Foster Grandparent, please review below:

#### Volunteering Benefits

- Transportation reimbursement
- On-site meals (when available)

- Paid time off
- Training
- Accident, personal liability and excess automobile liability insurance

#### **Volunteering Qualifications**

- Volunteers must be at least 55 years of age
- Must meet income eligibility requirements

#### **Retired and Senior Volunteer Program (RSVP)**

RSVP provides numerous opportunities for adults aged 55+ to volunteer within their community. The program is funded by the Corporation for National & Community Service and the United Way of Jackson County. Locally, the RSVP agency has more than 800 registered volunteers who provide services to about 60 not-for-profit organizations across Jackson County.

#### **Volunteering Benefits**

- Supplemental insurance
- Mileage reimbursement
- Volunteer recognition

#### **Volunteering Qualifications**

Volunteers must be at least 55 years of age

Below are ways in which volunteers can donate their time to RSVP:

- **Call-a-Ride:** Volunteers transport senior and disabled residents from Jackson County who do not have other modes of transportation to their medical-related appointments.
- **Senior Health Insurance Benefits Assistance (SHIBA):** SHIBA volunteers help seniors better understand healthcare insurance through information presentations and one-on-one counseling services.
- **Respite Care:** Respite volunteers provide full-time caretakers relief to run errands, spend time with others, and relax.
- **Age Wise Age Well:** A peer-counseling program for those 60+ residing in Rouge Valley. Sometimes, life issues can be overwhelming, so the program supports for those who need someone to talk to and listen.

## Position Summary

### Reporting Relationships

The President, Foundation will provide strategic leadership, vision, and operational oversight for the Foundation, ensuring philanthropy is fully aligned with the mission, priorities, and long-term sustainability goals of the organization. This position will serve as the organization's senior philanthropic leader and will advance a culture of generosity by strengthening donor relationships and transforming giving.

The President, Foundation will lead the development and implementation of a comprehensive philanthropy strategy that supports organizational growth, resident experience, benevolence, community initiatives, and strategic priorities across the organization.

This role will serve as a trusted advisor and collaborative partner to executive leadership, PRS's Boards, residents, donors, and community leaders. The new leader will champion the organization's mission, vision, and core values in their leadership, activities, and decisions.

The President, Foundation will provide strong leadership and accountability for all philanthropic operations, donor stewardship, fundraising performance, financial management, governance support, and team development.

### Responsibilities

The successful President, Foundation will:

- Lead the development of a comprehensive, annual philanthropy plan that meets the needs of PRS.
- Determine annual goals for new gifts and pledges, and cash collections, through the budget process. Develop a three to five-year strategic plan for PRS and monitor and communicate progress on the plan.
- Direct and oversee the receipt of charitable gifts, their financial stewardship, and their ultimate distribution to PRS to ensure continuous support of the organization.
- Act as the senior major gifts and planned giving officer, actively managing a portfolio of prospects and donors, meeting regularly to develop and build relationships.
- Ensure a long-term relationship is forged with donors by maintaining contacts and educating donors on outcomes and results of PRS.
- Design and implement growth and retention strategies with existing donors and opportunities to develop new donor relationships.
- Serve as a key leadership team member and active participant in making strategic decisions regarding PRS's revenue development strategy.
- Manage and nurture the development of PRS's philanthropic staff across the system, including hiring, training, performance evaluation, and professional development.

## Goals and Objectives

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The President, Foundation, must demonstrate meaningful progress within the first 18 to 24 months of their tenure. Key areas are listed below in no particular order of priority.

## **Leadership, Culture and Communication**

- Champion and operationalize the organization's Mission, Vision, and Core Values throughout all Foundation initiatives, donor engagement strategies, and leadership practices.
- Serve as a highly visible and mission-driven ambassador for philanthropy, building strong relationships with residents, families, donors, volunteers, community leaders, and strategic partners.
- Foster a culture of generosity, accountability, innovation, and collaboration throughout the Foundation and broader organization.
- Provide thoughtful, transparent, and strategic communication to Foundation stakeholders, executive leadership, and Boards of Directors.
- Lead and mentor Foundation staff while establishing clear expectations, measurable goals, and a culture of high performance and service excellence.
- Inspire confidence and trust through ethical leadership, executive presence, and consistent alignment between organizational priorities and philanthropic initiatives.

## **Strategy, Vision and Philanthropic Leadership**

- Develop and execute a comprehensive strategic plan for philanthropy that advances organizational growth, innovation and mission-impact.
- Establish annual fundraising priorities, goals, budgets, and measurable performance metrics aligned with organizational objectives.
- Position philanthropy as a strategic driver of organizational advancement and community impact.
- Lead donor cultivation and stewardship strategies that will increase donor engagement, retention and transformational giving.
- Collaborate with executive leadership and PRS's Boards to align restricted and unrestricted philanthropic resources with current organizational priorities.

## **Foundation Operations, Financial Stewardship and Performance**

- Provide executive oversight of all Foundation operations, ensuring effective systems, processes, stewardship practices, and fiscal accountability.
- Expand and strengthen major gifts, annual giving, planned giving, estate gifts, corporate partnerships, grants, and foundation support.
- Lead the development and implementation of annual fundraising plans and associated operating budgets.
- Establish and monitor key performance indicators related to fundraising performance, donor engagement, stewardship, and operational effectiveness.

- Utilize CRM systems and data analytics to strengthen donor cultivation, pipeline management, stewardship, and operational efficiencies.
- Ensure charitable gifts are appropriately received, managed, and distributed in accordance with donor intent, organizational priorities, and applicable regulations.
- Partner with finance and executive leadership to support strong internal controls, compliance practices, audits, and fiscal oversight.
- Drive continuous operational improvement and organizational effectiveness within philanthropic functions.

## **Board Relations, Community Engagement and Advocacy**

- Serve as a trusted strategic partner to Foundation and organizational Boards of Directors, supporting governance, engagement, and philanthropic alignment.
- Support Board recruitment, orientation, engagement, and philanthropic participation.
- Equip Board members to serve as informed ambassadors, advocates, and fundraising partners for the organization.
- Strengthen and expand relationships with residents, families, congregations, healthcare organizations, corporations, community groups, and strategic partners.
- Represent the organization at community, regional, and industry events to enhance visibility, engagement, and philanthropic opportunities.
- Remain current on philanthropic trends, donor engagement strategies, and best practices within nonprofit and senior living sectors.
- Advocate for philanthropy as a critical component of mission fulfillment, innovation, and long-term organizational sustainability.

## **Reporting, Analytics and Strategic Insight**

- Provide regular reporting and strategic updates regarding fundraising performance, philanthropic trends, donor activity, and organizational opportunities.
- Utilize financial, operational, and philanthropic data to inform strategic decisions and resource allocation.
- Identify emerging opportunities, risks, and trends that may impact fundraising performance or organizational priorities.
- Ensure executive leadership and Boards are informed through timely, thoughtful, and actionable communication.

## Candidate Qualifications

### Education/Certification

- Bachelor's degree required. Master's degree preferred.

### Knowledge and Work Experience

- Minimum of ten (10) years of progressive fundraising leadership experience, including major gifts, planned giving, annual campaigns, donor stewardship, and philanthropy strategy.
- Proven success securing significant and transformational gifts, both personally and through leadership of fundraising teams.
- Demonstrated experience partnering with nonprofit Boards and executive leadership teams.
- Strong financial acumen, including experience with budgeting, financial stewardship, forecasting, and operational alignment.
- Experience with CRM systems, donor analytics, fundraising reporting, and stewardship processes.
- Knowledge of nonprofit governance, compliance, internal controls, and fiscal oversight practices.
- Excellent written, verbal, interpersonal, and presentation communication skills.

### Leadership Skills and Competencies

- Leads with authenticity, integrity, humility, and a strong commitment to mission and values.
- Builds alignment and accountability while fostering collaboration and innovation.
- Demonstrates executive presence and the ability to influence and inspire diverse stakeholders.
- Possesses strong business acumen and strategic thinking capabilities.
- Approaches challenges with optimism, resilience, and solution-oriented leadership.
- Creates an environment where team members feel empowered, supported, and accountable.
- Understands the importance of thoughtful change management and transparent communication.
- Maintains a visible and approachable leadership style with residents, donors, staff, and community partners.
- Passionate about supporting older adults and advancing the mission of the organization through philanthropy.

## The Community

### Medford, Oregon

The Rogue Valley is the gateway to the wild scenic whitewater section of the Rogue River offering excellent whitewater rafting and world-class salmon and steelhead fishing. There are abundant outdoor recreational activities in the area. The three largest communities in the area by population include Medford, Grants Pass, and Ashland.

Medford is located in Jackson County, Oregon. The city has a total population of 86,367 (2021) and a metropolitan area population of approximately 225,000, making Medford the fourth largest metro area in Oregon.

Known for its appeal to outdoor enthusiasts, Medford is headquarters to the Rogue River National Forest, 600,000 acres of hidden wildflower meadows, dazzling forests of towering ponderosa pines, and swift flowing mountain streams. Medford and the surrounding areas are home to the expanding Oregon wine industry that includes an expansive variety of wines, rivaling Northern California's wine country.

Medford has a small-town feel, while benefitting from a larger city's amenities. The city is the business center of the Rogue Valley and offers an array of museums, art galleries, live theaters, performing art centers, and education-inspired attractions. Medford's economy is driven primarily by the healthcare industry and is the economic center for over 580,000 people located in Southern Oregon and Northern California. The largest direct marketer of fruits and food gifts in the United States, Harry & David, is based in Medford and is the second largest employer in Southern Oregon. Few other locations can boast such a diverse blend of culture and the great outdoors. To view Medford's Online Visitor Guide, please visit <https://www.travelmedford.org/>



Park, 100 acres of open green space in the center of town, and miles of walking and biking trails extending in several directions.

Ashland, a short drive from Medford, is known as a cultural and artistic community with national acclaim. Ashland, with a population of approximately 21,600 (2021), is home to Southern Oregon University, the Oregon Shakespeare Festival, and the Medford Jazz Festival offering cultural activity that may be unmatched by any other small community in the country.

A vibrant and creative community, Ashland has a well-deserved reputation as an artistic enclave. Drawn by the incredible quality of life, technology innovators and high performing companies doing global business make Ashland their home. Ashland is an extremely pedestrian-friendly city, with Lithia

Ashland is located at the convergence of the Cascade and Siskiyou Mountains, where forested alpine peaks give way to some of the most fertile and bio-diverse lands to have ever been shaped by geologic wonder and the hands of time. Outside of the business districts, Ashland offers a host of outdoor attractions. The famous Pacific Crest Trail, Crater Lake, rafting, biking, and Mount Ashland ski slopes are all nearby. To see more reasons to explore Ashland and view their visitor guide, [click here](#).

For more information, please see the following websites:



<http://www.medfordchamber.com>

<http://www.ashlandchamber.com>

<http://www.city-data.com/city/Ashland-Oregon.html>

<https://www.southernoregon.org/>

<https://jacksonvilleoregon.org/>

## Procedure for Candidacy

Search consultants Lisa DeSimone Arthur and Stephanie Ikediobi are partnering with Pacific Retirement Services, Inc. on this important search. Please direct all nominations, inquiries, applications of interest, CVs, and resumes to Lisa DeSimone Arthur or Stephanie Ikediobi, preferably via the WittKieffer candidate portal, which can be accessed [here](#). Other comments, concerns, or questions may be addressed to Stephanie Ikediobi via email at [sikediobi@wittkieffer.com](mailto:sikediobi@wittkieffer.com)

*Salary Range: \$218,000-\$274,000 plus opportunity for an annual performance incentive.*

*The salary range for this role may vary above or below the posted range. Compensation takes into account several factors including, but not limited to, a candidate's experience, education, skills, licensure and certifications, department equity, training, and organizational needs.*

*Pacific Retirement Services, Inc. is committed to equal opportunity for all persons regardless of age, color, disability, ethnicity, marital status, national origin, race, religion, sex, sexual orientation, veteran status, or any other status protected by law.*

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## Appendix A

### California

#### The Peninsula Regent

Located in San Mateo, California, The Regent is a not-for-profit 207 condominium community for independent adults aged 60 and over. The Regent is located between San Francisco and San Jose. It's in an ideal location that is within walking distance to shopping, entertainment, salons, parks and the library.

Instead of paying an entrance fee, residents purchase their home to ensure they have a valuable asset for their heirs and that they are able to enjoy the benefits the membership provides. There are one or two-bedroom condo options. The campus offers over 50,000 square feet of member areas including four quarter-acre courtyards. There are a variety of dining options that range from the traditional dining room where members can choose to dine inside or outside, the private dining that can be used for family gatherings or special events, and the bistro, which offers a more casual environment. The condos at The Regent can be customized. Features include:

#### Residence Features

- One-bedroom, one-bedroom with den, and two-bedroom styles
- Several floor plan options
- Private balcony with view
- Fully equipped kitchen with appliances
- Spacious bathrooms with separate tub and shower
- Individually controlled heating and cooling
- Spacious closets
- Large, double-glazed windows for sound proofing and energy efficiency
- Washer and dryer
- Full life-safety system
- 24-hour emergency call system
- Pet friendly

Members pay a monthly fee that includes an array of services and amenities.

Below, is a list of services offered.

- Concierge lifestyle with secure entrance
- Weekly housekeeping and linen service
- Scheduled transportation/car service to appointments or special events
- Game room
- Support preparing your home for special events
- Indoor pool
- Penthouse auditorium
- Art studio
- Bocce ball court
- Library

#### Health and Wellness

At The Regent, it's important for members to have the opportunity to bolster their social, intellectual, and vocational well-being. Off-campus excursions to museums and art galleries are provided. Members can take an art class, serve on a Board, volunteer or even choose to attend a symphony or ballet. Additionally, the community hosts many interest groups formed by fellow Members so there is something for everyone to feed their passions.

## University Retirement Community at Davis (URC)

Located in Davis, a university town, URC combines resort-style services and amenities allowing residents to live each day to the fullest. Dining is one of the key factors in overall wellness. There are two dining options on campus. The main dining room provides an elegant atmosphere to dine with trained wait staff. La Brisa is a bistro that provides a more casual setting. To learn more about the services and amenities provided at the URC, please see below:

### Services

- Three unique on-site restaurants, including a bistro and an outdoor dining patio
- A state-of-the-art fitness and aquatic center
- Indoor pool
- Heated outdoor pool
- Spa & sauna
- Steam rooms
- Dakim Brain Fitness Center
- Auditorium
- Library
- Computer center
- Art studio
- Beauty and hair salons
- Billiards room
- Bocce court
- Club lounge
- Game room
- Tinkers' Den
- Wi-Fi in common areas
- Resident laundry room
- Storage space
- Resident intranet
- On-site bank

### Amenities

- Housekeeping
- Flat-linen service
- General maintenance and groundskeeping
- Concierge service
- 24-hour campus security system

## Oregon

### Cascade Manor

Cascade Manor is the only not-for-profit life plan community located in Eugene, OR. The campus is located close to the University of Oregon providing convenient access to sporting events and the arts community. The campus sits on seven acres and has apartment homes with 30 different floor plans in four buildings. The apartments range from studio layouts to two-bedrooms. There are two dining options available for residents, the Columbia Dining Room which is a more elegant option and Rogue Bistro that is a more casual atmosphere. For special events, residents also have private dining options. Services and amenities provided at Cascade Manor include:

### Services

- Two dining venues
- Fitness and Aquatic Center
- Indoor lap pool and spa
- Auditorium
- Woodshop
- Art studio
- Three fireside lounges
- Hair salon
- Library and game room
- Water features
- Outdoor green space
- Rooftop solarium
- Resident gardens
- Around-the-clock staffing and night-time security

### Amenities

- Housekeeping
- Laundry
- Catering
- Building and yard maintenance
- Scheduled transportation at no additional cost
- Private sedan driver

### **Holladay Park Plaza**

Located in Portland, OR, and in close proximity to Moda Center, Holladay Park Plaza offers vibrant living close to sporting events, shopping and beautiful walking paths. Steps away from MAX light rail, residents could also opt to utilize public transportation to further explore the offerings of Portland, OR. The dining options at the Holladay Park Plaza offers fresh and healthy options. Bridges is a classy restaurant that offers a fine dining experience. Bistro 1300 is a more casual option where residents can choose to grab food on the go. If a resident would like to have a special event, there are also private dining options. Residents have 30 different apartment floor plan options to choose from that range from a studio to a two-bedroom apartment. Each unit has a large private balcony and floor-to-ceiling windows. The follow offerings are made available on the Holladay Park Plaza campus:

#### **Services**

- Housekeeping
- Laundry
- Transportation
- Catering
- Building and yard maintenance

#### **Amenities**

- Fitness Center
- Resident business office: Fax, copy machine, paper shredder, and computer
- Hair salon
- Library
- Art studio
- Nondenominational religious services
- Penthouse lounge and auditorium
- Wise Buys resale and gift shop
- Rooftop deck and walking track
- Underground parking
- Around-the-clock security
- Courtesy Wi-Fi network service throughout the building
- Woodworking shop

### **Mirabella Portland**

Mirabella Portland is located in the South Waterfront district of Portland, OR. Mirabella is a fast-developing neighborhood located in close proximity to Elizabeth Caruthers Park where the local South Waterfront Farmer's Market is located. There are plenty shops and eateries located within walking distance. The South Waterfront Aerial Tram provides a public transportation option to get to the Oregon Health and Science University. There are four dining options made available to residents: the Dolce Vita Bistro, Aria Dining Rooms, Aqua Vita Lounge and an Outdoor Dining Terrace. Each offers its own unique view of the city. One-bedroom, two-bedroom and penthouse style options are offered. They can be customized depending on the taste of the resident. Several services and amenities are available at Mirabella Portland, including:

#### **Services**

- Housekeeping
- Flat-linen service
- General maintenance and groundskeeping services
- Room service
- Concierge service

### Amenities

- Four unique, on-site dining venues
- Fitness and Aquatic Center
- Indoor pool
- Whirlpool
- Dry sauna
- Steam room
- Resident business center
- Copy machine, computers, notary public
- Beauty salon
- Library
- Art studio
- Woodworking shop
- Rooftop terrace
- Wi-Fi in common areas
- Resident Intranet
- Underground valet parking
- 24-hour security
- Storage locker

### Rogue Valley Manor

Located in Medford in Southern Oregon, Rogue Valley Manor is a community of about 1,000 residents offering breathtaking views. The campus spans 668 acres and provides an abundance of opportunities for residents to participate in outdoor recreational activities, trips to local wineries, dine at nice restaurants and more. For lifelong learners, residents can attend lectures, seminars and special events at Southern Oregon University. Home styles range from one-bedroom to three-bedroom apartments or cottages. Each one has an open floor concept, spacious living areas, full kitchens and private decks. There are over 300 cottages and 300 apartment homes on campus. There are three restaurants, Quail's Nest Bistro, the Main Manor Dining Room, and Arden Fine Dining, located on campus. Recreational options include:

- Bocce ball court
- Croquet court
- Pickleball court
- Tennis court
- Lawn bowling
- Horseshoe pits
- Game and billiards room
- Gardens, walking paths & outdoor spaces
- Dog park
- Quail Point golf course

There are plenty of hobbies offered to residents to stay engaged and pursue their passions, including:

- Over 100 clubs and resident interest groups
- Auditorium
- Craft room
- Ham radio studio
- Hobby shop
- Library
- Theater room
- Video library
- Wood and machine shops
- Art studio

Rogue Valley Manor provides hassle-free living to residents. Services included in the monthly fee include:

- Housekeeping
- Laundry
- Transportation
- Catering
- Home and yard maintenance

## Arizona

### Mirabella at ASU

Mirabella at ASU offers an intergenerational community and is located on the campus of Arizona State University. Being integrated on a campus, Mirabella at ASU, provides endless social, educational and recreational activities for residents. Over 50 different one- and two-bedroom floor plans are offered to residents in a high-rise apartment community. The plans can be tailored to fit the needs of the resident. Residents can dine at Aria, Adagio, Aqua Vita or Dolce Vita Bistro. With hassle free living at the center, the following services are provided to residents:

#### Services

- Housekeeping
- Laundry
- Transportation
- Catering

The following amenities are offered on campus:

#### Amenities

- Ground floor bistro with indoor and outdoor seating
- Fitness and Aquatic Center
- Auditorium/theater
- Classroom
- Library
- Woodworking shop
- Art studio
- Art gallery
- Game rooms
- Salon and spa
- 24-hour security
- Flexible dining plan
- Housekeeping
- Concierge service
- Valet parking
- Town car service/shuttle
- Away credit
- Access to multiple campus engagement opportunities related to lifelong learning, intergenerational community building, social impact, and personal well-being

## Wisconsin

### Capitol Lakes

Capitol Lakes is located in downtown Madison, WI. The community is diverse and vibrant. It is in close proximity to Overture Center for the Arts and the Madison Museum of Contemporary Art. Additionally, State Street offers countless eateries providing dining options for all types of palates. For outdoor lovers, there are an abundance of recreational options such as fishing, swimming and golfing. Capitol Lakes is the official retirement community of the University of Wisconsin Alumni Association and neighbors University of Wisconsin-Madison providing residents the option to be lifelong learners through courses. There are two restaurants located on the Capitol Lakes campus, Seasons and Henry Street Café. Capitol Lakes offers one-bedroom and two-bedroom deluxe apartments ranging to 2,000 sq. ft. of space.

### Services and Amenities

Residents have access to a 24-hour concierge desk, housekeeping and transportation. The following amenities are provided at Capitol Lakes:

- Two gourmet dining venues
- Aquatic and Wellness Center
- Indoor 25 Foot Lap Pool
- Indoor Exercise Pool
- Indoor Whirlpool
- Fitness Center and Classes
- Library
- Atrium
- Technology center
- Craft room
- On-site chapel and chaplain
- Round-the-clock security
- Massage therapist
- Gathering spaces
- Beautiful outdoor patio and flower garden
- Art galleries
- Underground parking

## New Mexico

### La Vida Llena

Located in Albuquerque, NM, La Vida Llena has earned a reputation as one of New Mexico's most progressive senior living communities. Designed with a holistic approach to positive aging, its name translates to "the full life," reflecting its mission to provide a fulfilling and enriching experience for residents.

Situated along the Rio Grande, Albuquerque is New Mexico's largest city, offering a vibrant blend of Old World influences and modern amenities. Ranked among the top 30 most walkable cities in the U.S., it features an excellent public transportation system, making independent living effortless. Residents enjoy cultural treasures like the New Mexico Philharmonic's stunning concerts and the world-class Santa Fe Opera, just a short drive away. The city also boasts an array of museums, spanning science, art, and history, featuring international exhibits and captivating events.

In 2019, La Vida Llena embarked on its largest renovation to date, inspired by resident feedback. The updated apartments include thoughtfully designed floor plans: two-bedroom with a den, two-bedroom, and one-bedroom with a den. The campus also offers a wide range of services and amenities to meet residents' needs.

## Services

- Housekeeping
- Laundry
- Transportation
- Building and yard maintenance

## Amenities

- 24/7 In-House News and Entertainment Channel
- Chapel
- Computer Lab
- Fitness Center
- Art Studio and Artist Spaces
- Pools
- Beauty and Barber Shop
- Market Place
- Sculpture Garden
- Pet Friendly

## The Neighborhood in Rio Rancho

The Neighborhood is a Life Plan Community thoughtfully designed to provide multiple levels of care on a single campus, located just outside Albuquerque. Nestled in the charming city of Rio Rancho, this community offers seniors a vibrant lifestyle enriched by culture, natural beauty, traditional cuisine, and a variety of local events. Set against the stunning high desert landscape of Rio Rancho, The Neighborhood is close to the Rio Grande River, offering perfect opportunities for morning walks along the Willow Creek Bosque Trail or quality time with grandkids at Cabezon Park. The breathtaking views of the Sandia Mountains make retirement truly spectacular.

Residents can choose from one-bedroom or two-bedroom options, and the campus provides a wide range of amenities and services to meet their needs.

## Services

- Housekeeping
- Laundry
- Transportation
- Building and yard maintenance

## Amenities

- Library
- Creative Arts
- New Horizon's Art Gallery
- Meeting Rooms
- Game Room
- Private Dining Room
- Media Center
- Chapel
- Beauty and Barber Shop
- Fitness Center
- Indoor Pool and Hot Tub
- General Store
- Dog Park
- Gardening Area

## Texas

### Trinity Terrace

Located in Fort Worth, Trinity Terrace is located in close proximity to museums, scenic parks and top-notch restaurants. There are over 30 different apartment floor plans offered and each unit comes with a private balcony and large windows with a city view. There are three different dining options: Blue Spire Fine Dining, Stonestreet Bistro and Elm Fork. Residents also have the flexibility to host events with a private dining option. Trinity Terrace

has first class services and amenities, including:

- On-site banking
- Hair salons
- Housekeeping
- Maintenance
- Transportation services

## Washington

### Mirabella Seattle

Mirabella Seattle is in South Lake Union in the center of Seattle, WA, located near the Seattle Art Museum, Pike Place Market and many popular restaurants. The Seattle Streetcar provides an affordable public transportation option that provides residents access to cultural, culinary and recreational opportunities. There are five dining options made available to residents: Aria, Dolce Vita Bistro, Evergreen Lounge, Vineyard Room and Adagio. The community has a variety of one- and two-bedroom Independent Living and penthouse style apartments with amazing views. The following amenities are provided at Mirabella Seattle:

- Fitness and Aquatic Center
- Whirlpool
- Resident business center
- Copy machine, computers, notary public
- Beauty salon
- Library
- Art studio
- Indoor Pool
- Woodworking shop
- Wi-Fi in common areas
- Resident Intranet
- Underground valet parking
- 24-hour security
- Storage locker

With convenience in mind, Mirabella Seattle provides the following services:

- Housekeeping
- Flat-linen service
- General maintenance and groundskeeping services
- Room service
- Concierge service



WittKieffer is the premier executive search and advisory firm developing inclusive, impactful leadership teams for organizations that improve quality of life. For more than 50 years, we have operated exclusively at the intersection of not-for-profit and for-profit healthcare delivery, science, and education – the Quality of Life Ecosystem. Through our expert executive search services as well as our Professional Search, Interim Leadership, and Leadership Advisory solutions, we strengthen organizations that make the world better.

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