

LEGACY SOCIETY

The Legacy Society, which honors and acknowledges all donors who have made deferred and/or outright gifts totaling \$15,000 or more to the Casa Foundation, has been a significant factor in the Casa Foundation's growth and success. Legacy gifts have been instrumental in creating many visible benefits for Casa residents and continue to serve as an example of philanthropy at work. Originally consisting of several benefactors, the Legacy Society now acknowledges a total of 263 memberships (96 living).

Legacy Cocktail Reception 2018



Netta Wells & Darlene Beringhause



VOLUNTEERS

The Casa Foundation is governed by a five-member board, consisting of three Casa de las Campanas board members and two residents. A resident advisory committee and a fund development advisor support development efforts and advise the board of directors on appropriate programs and activities. Casa de las Campanas Life Care Services' executive management team, headed by Kim Dominy, provides oversight and coordination of ongoing Foundation operations. David Johnson serves as CFO for the Foundation, and Hilary Sanford, Casa's Director of Administration, serves as the Foundation's recording secretary.

2019 Foundation Board of Directors



Steve DeMatteo
Chair



Mike Stelman
Vice Chair



Ethel Neichin
Secretary



David Johnson
CFO



Jim Roth
Director



Ken Waters
Director

Past Foundation Directors

Bruce Bare, James Beeman, Kathy Frederick, Dan Freeman, Eileen Haag, Donald Haught, Karla Hertzog, Keith Hiner, Ina Howk, Dr. John Ingle, Laura Ilka, Joel Irwin, Robin Jensen, Marcy Kaye, Catherine Larkins, Michael Malone, Harvey March, Jeannine McCullagh, Nelle O'Brien, Richard Ormsby, Robert Reeves, Steve Riddle, Jay Riordan, Dorothy Risheberger, George Scharnberg, Donald Schmidt, Ron Stinson, Bob Trettin, Patricia Wahl, Craig Wyble.

Past Foundation Advisory Committee Members

Bob Anttila, Yvonne Ball, Bruce Bare, Cliff Barkell, Dr. Carl Burk, Marty Carlson, Isabelle Cass, Norm Crocker, Richard Curley, Hal Dallke, Bob Dunlap, Jeanne Feldman, Morey Feldman, Forest Fouts, Erika Fry, Mary Grosskopf, Pat Heath, George Hill, Syrie Hill, Walter Hirsch, Ruth Hohberg, Ina Howk, Joe Howland, Laura Ilka, John Ingle, Joel Irwin, Beverley Kelsey, Bruce King, Adrienne Kronenberger, Bob McKahan, James Nauman, Ruth Nesselroad, Mary Lou Norberg, Nelle O'Brien, Margaret Orr, Barbara Oyler, Donna Peterson, Betty Pitt, Jean Pounds, George Scharnberg, Ethel W. Steffy, Marguerite Strand, Russ Wagner, Guy Warfel, Richard Wexler, Janet Woodworth.

Fund Development Advisor

Cynthia Steiger

2019 Foundation Advisory Committee



Back l-r: Fun-Den Wang, Dan Beringhause, Dave Johnson, Ken Waters (Board member) **Middle l-r:** Ethel Neichin (Board member), Jeannine McCullagh (Advisory Committee Chair), Carol Rhoades, Joan Levinson, Marguerite Lawry, Garry Butterfield

Front l-r: Dot Koerner, Jo McBrayer, Dorothy Risheberger, Neal Macurda, and Doris Hargrove. Not pictured is Sonny Googins.

FUNDING

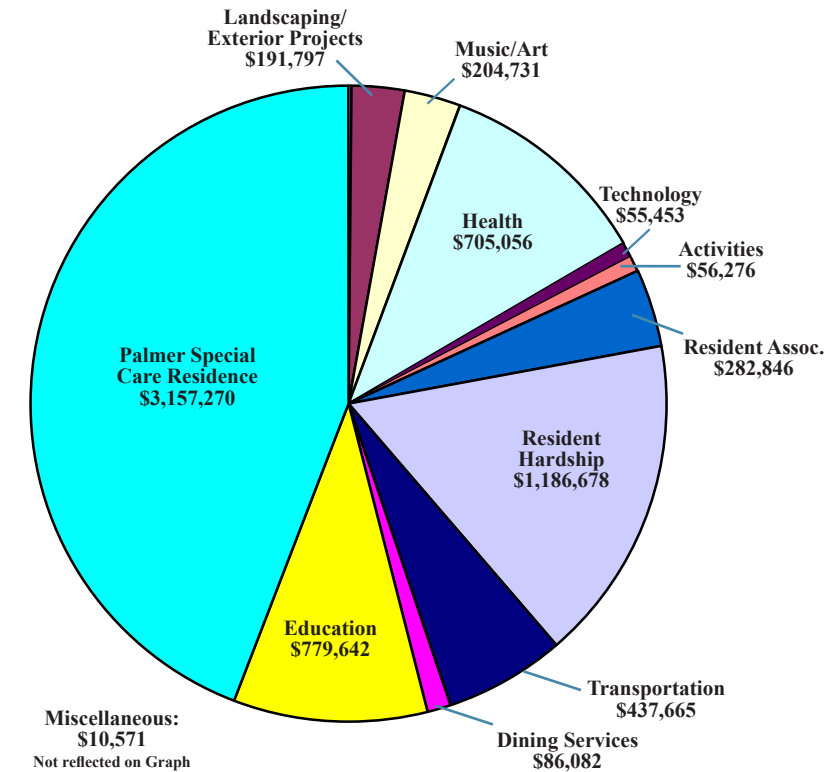
Foundation Funding

Resident involvement and interest has shaped the direction and focus of Foundation funding, leading to a wide range of projects and services benefitting Casa de las Campanas residents. Foundation funding from inception through December 31, 2018, totaled \$7.154 million.

Since inception, a variety of capital projects and programs have received Foundation support. The Palmer Special Care Residence tops the list of supported projects at \$3.15 million, with a lead gift from resident philanthropist Freda Palmer of \$2 million. Other major categories include resident hardship funding of \$1,186,678, health-related funding of \$705,056, and education/scholarship funding of \$779,642.

Foundation Funding \$7.1 Million

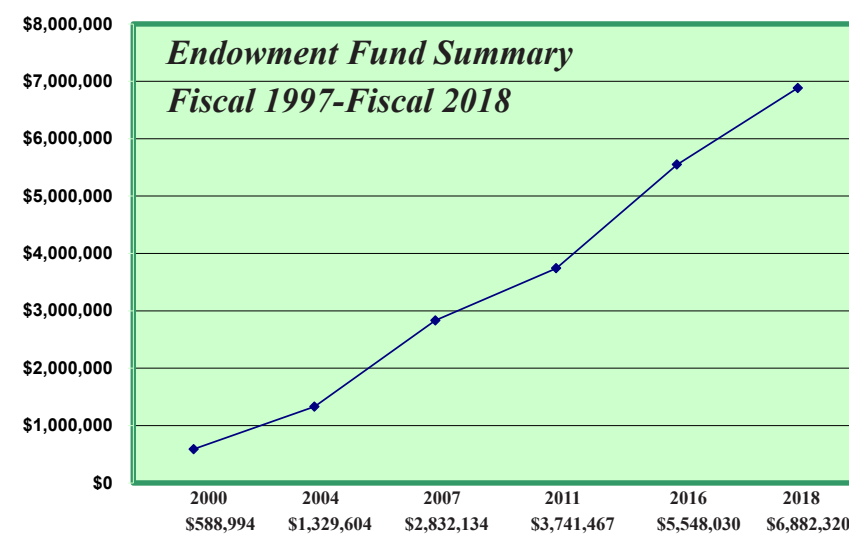
Inception to
12/31/2018



FUNDS

Endowment Funds

We are pleased to report that Foundation-held endowment funds, including those that have been established by donors and those that have been established by the board of directors, have grown steadily over the years. They provide a permanent base of support for funding needs. As of July 31, 2018, the Foundation's endowments totaled more than \$6.8 million.



Endowment Funds 7/31/2018

Tilburg General	\$2,160,291
Resident Hardship	1,367,594
Newman Care	665,637
Transportation	536,757
Wynhoff Health	492,434
Scholarships*	454,954
King General	359,679
Thiele/Gamble Music	242,262
Maclean General	221,782
Special Care Program	196,529
Hegewald Health	128,117
Carpenter Activities	40,119
Levinson Norte Library	16,165

TOTAL **\$6,882,320**

* Burk, Chen, Fouts, General, Greene, Gilkeson, Hunt, Johnson, Kelley, McCullagh, Nauman, Palmer, Shogren, Wang & Yu.

Other Foundation Funds

Popular non-endowment foundation funds include the Activities Fund, Art Fund, Chaplain's Fund, Employee Assistance Fund, Employee Scholarship Fund, Landscaping Fund, Music Fund, Resident Association Fund, Resident Hardship Fund, Betts Rose & Garden Club Fund, Rosenmeier Health Fund, Special Care Program Fund, Betts Sur Library Fund, and Transportation Fund.

LIFE INCOME PROGRAMS

Charitable Gift Annuity Program

Most people want to know that they can always count on income from their investments, which is why our Charitable Gift Annuity program is so popular. It's a solution that our residents can count on. Not only are income rates attractive, they are guaranteed for life and backed by the assets of Casa de las Campanas. Any remainder left in the account at termination is used by the Casa Foundation to further its mission and purpose in the community.



In exchange for participating in the program, Casa agrees to pay a fixed income for life to the named beneficiaries of the contract. We offer the maximum rates published by the American Council on Gift Annuities, based on age, which typically range between 6% and 9.5% for Casa residents. Steady income isn't the only advantage. In addition to a hefty income tax deduction, a portion of the income received is treated as tax-free. Gift annuities are flexible and can be set up to benefit children or other loved ones. Best of all, charitable gift annuities allow our residents to become involved as philanthropists. A minimum of \$15,000 in cash or securities is all that is required to participate.

Benefits of Life Income Programs

- Guaranteed Income for Life
- Attractive Income Payouts
- Charitable Income Tax Deduction
- Partially Tax-Free Income
- Ability to Benefit Others
- Membership in the Legacy Society
- No Administration Fees
- Easy to Establish

Pooled Income Fund

Donors may also elect to participate in the Foundation's Pooled Income Fund for an initial contribution of \$15,000. Gifts are pooled and invested in a fixed-income portfolio. Donations are tax-deductible and income varies depending on market performance.

MILESTONES

1994 Casa Foundation was incorporated and charitable remainder trusts were established by David & Ellie Harper and Lenore Bordeau for the benefit of the Casa Foundation.

1995 The Casa Foundation Resident Advisory Committee was formed to support growth of the Foundation and to advise the Board of Directors.

1996/97 The Casa Foundation received its first bequest from the estate of Russell & Lydia Hogan & a major gift enabled the purchase of the Bluebird bus for resident transportation.

1998 The Foundation general endowment was officially christened the Tilburg General Endowment in honor of Bill & Elsie Tilburg.

1999 The Carpenter Activities Endowment was put in place by Peggy Carpenter as the first resident-established endowment.

2000/01 Justin & Phyllis Radin underwrote the purchase of a player grand piano for the Health Center & the Nelle O'Brien Continuing Education Fund was established in Nelle O'Brien's honor.

2002 The Caring for Life campaign, chaired by Richard Ormsby and Dr. John Ingle, raised over \$3 million to assist in building the Palmer Special Care Residence.

2003 Gift Annuity contracts in excess of \$700,000 were put in place for the benefit of Casa residents.

2004 A ground-breaking ceremony recognized Freda Palmer for her \$2 million gift to build the Palmer Special Care Residence.

2005 George & Patricia Wynhoff put plans in place for future funding of a major health endowment.

2006 The Foundation received gifts of \$100,000 for the Bell Tower Park and \$70,000 for the purchase of a new Casa bus.

2007/08 174 donors contributed \$161,240 to the "We Care" campaign for resident hardship.

2009 Resident gifts provided support for the purchase of a needed wheelchair-modified van.

2010 Adrian Newman left a major bequest to establish the Newman Care Endowment for the support of the Resident Hardship Program.

2011 The King General Endowment was established with a bequest from Bruce and Marjory King.

2012 A Gift from the estate of Harriet Maclean established the Maclean General Endowment.

2013 *Milestones in Philanthropy*, a historic account of the Foundation, was produced in tandem with Casa's 25th anniversary.

2014 The Cliff & Ethel Barkell estate provided a major gift to establish the Barkell Transportation Endowment.

2015/16 Foundation assets and endowment funds reached new heights with assets totaling over \$7 million by the end of fiscal 2016.

2017/18 The Alice Green Scholarship Endowment, the Levinson Norte Library Endowment, the Carol & Bob Shogren Scholarship Endowment, and the Selma Johnson Scholarship Endowment were established during fiscal 2017 and 2018. Revenue for fiscal 2018 exceeded \$2 million, making it an exceptional year.

The Casa Foundation is a tax-exempt, nonprofit public operating foundation whose mission is to develop, oversee, and administer philanthropic resources for the benefit of the Casa de las Campanas retirement community.

"Milestones" is an acknowledgment to the hundreds of donors, volunteers, staff, and friends who have significantly impacted the progress and development of Casa Foundation Inc. since its inception in 1994 through 2018. As the early directors envisioned, gifts made to the Casa Foundation have helped to enhance programs and services for the benefit of residents.

Over the years, donor generosity and interest have initiated the establishment of a variety of funds serving to shape a foundation that will continue as a beneficial element in the lives of everyone who has made Casa de las Campanas their home. Growth of endowment funds have continued to create a stable and ever-increasing funding base for future generations.

Benefits from contributions to the Casa Foundation have extended to other constituencies as well. As a community resource, a substantial employer, and a national model for all retirement living facilities, Casa's continued success reflects on the community of Rancho Bernardo, San Diego County, and the state of California.

It is with gratitude that the Foundation Board of Directors extends its appreciation to all past, present, and future supporters.

"If you want to touch the past, touch a rock. If you want to touch the present, touch a flower. If you want to touch the future, touch a life."

-Unknown



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MILESTONES

Casa Foundation 2019

