

# Legacy Society

The Legacy Society honors and acknowledges all donors who have made deferred and/or gifts totaling \$15,000 or more to the Casa Foundation. Legacy gifts have been instrumental in creating many visible benefits for Casa residents and continue to serve as an example of philanthropy at work. The Legacy Society currently acknowledges 93 members.

Legacy Luncheon 2023



# 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 philanthropy director support development efforts and advise the Board of Directors on appropriate programs and activities. Casa de las Campanas Life Care Services’ Executive Management team, directed by Kim Dominy, provides oversight and coordination of ongoing Foundation operations. David Johnson serves as CFO for the Foundation, and Maritza Maezze, Casa’s Director of Administration, serves as the Foundation’s recording secretary.

# A Life in Service

Dorothy (Dottie) Risheberger, a Casa de las Campanas resident who passed away in July 2023, believed that her purpose in life was to help others. She moved to Casa in 1993 and happily expressed, “At Casa you can do as much as you like or as little as you like”. Her diligence and dedication made a mark on Casa in many ways: Chair of the Health Services Committee, Secretary of the Finance Committee, nine years on the Executive Council, and a member of the Foundation Advisory Committee and the Legacy Society. She contributed to the Rancho Bernardo community by serving eight years on the RB Planning Board. Dottie was born in Huntington Park, California and graduated from high school in 1946, where she was a member of the swimming team and sang in the school chorus. After she received her Bachelor’s Degree in Education in 1950 from the University of Southern California, she began her forty-year teaching career in Los Angeles schools. In 1968 she received a Master’s Degree in Education, also from the University of Southern California. Her teaching career included Metropolitan Junior College, Lafayette JR. High School, Garfield High School, and a foreign adjustment mathematics class for educating first grade to college level students. Dottie inherited attributes from her parents and grandparents that helped her achieve her aspiration of helping others. Her mother taught music in Los Angeles schools, directed the church choir, and began needle point in her eighties! From her dad, a certified public accountant, she acquired a propensity for mathematics. Her grandparents moved from Ohio to Huntington Park, California in a covered wagon. Dottie was inspired significantly by her grandmother who taught 8th grade level children for forty years in a two-room school which they built in their backyard. She died at the age of 102. We celebrate Dottie’s life and gratefully acknowledge her many contributions and legacy gifts to Casa de las Campanas. Her generosity will always be with us as we enjoy the best quality of living with the many programs, groups, and services at Casa, which she supported with her monetary endowments to the Foundation as well as her life of service. She truly did achieve her purpose in life!



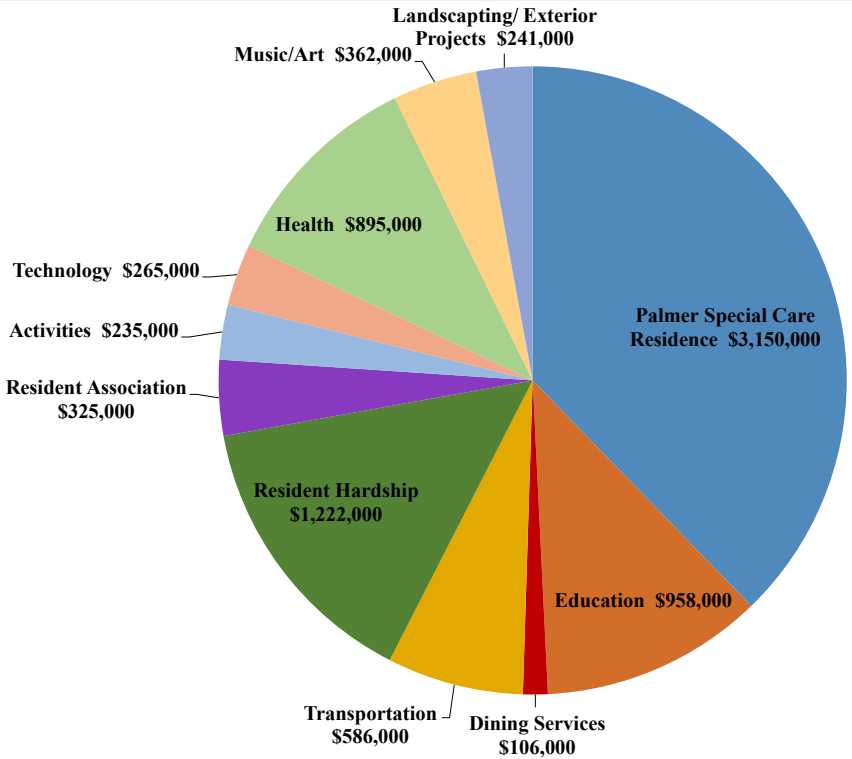
# Funding

## Foundation Funding

Resident involvement and interest have 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 in 1994 through July 31, 2023, totaled \$8.335 million and a variety of capital projects and programs has 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 \$1,222,000, health-related funding of \$895,000, and education/ scholarship funding of \$958,000.

## Foundation Funding \$8.3 Million

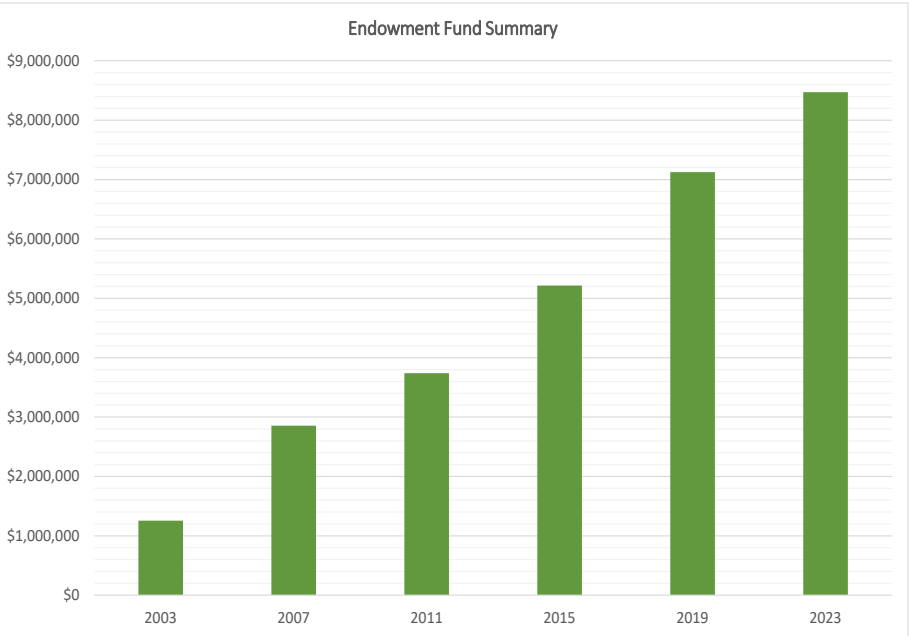
Inception to 7/31/2023



# Funds

## Endowment Funds

We are pleased to report that Foundation-held endowment funds, including those established by donors and those 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, 2023, the Foundation’s endowments totaled more than \$8.4 million.



## Endowment Funds 7/31/2023

Tilburg General Endowment	\$2,952,000
Resident Hardship	1,740,000
Nauman Endowment	1,192,000
Wynhoff Health Fund	1,085,000
Barkell Transportation Fund	580,000
King General Fund	292,000
Special Care Program	214,000
Scholarship Endowment	210,000
Music Fund	148,000
Maclean General Fund	60,000
TOTAL	\$8,473,000

# 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, but also 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, with a minimum gift of \$15,000 in cash or securities, Casa agrees to pay a fixed income for life to the named beneficiaries of the contract. Our current rates based on age, range between 8% and 11.7% for Casa residents. Steady income isn’t the only advantage. In addition to a large 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 and other loved ones. Best of all, charitable gift annuities allow our residents to become involved as philanthropists.

## 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



# Milestones

**1994** The Casa Foundation incorporated and Charitable Remainder Trusts were established by David & Ellie Harper and Lenore Bordeau for the benefit of the Casa Foundation.

**1995/96** The Casa Foundation Resident Advisory Committee was formed to support growth of the Foundation and to advise the Board of Directors. The Casa Foundation received its first bequest from the estate of Russell & Lydia Hogan.

**1997/98** A major gift enabled the Foundation to purchase the Bluebird bus for resident transportation. 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 as the first resident-established endowment by Peggy Carpenter.

**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.

**2002/03** 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. Gift Annuity contracts in excess of \$700,000 were put in place for the benefit of Casa residents.

**2004/05** A ground-breaking ceremony acknowledged Freda Palmer for her \$2 million gift to build the Palmer Special Care Residence. George & Patricia Wynhoff put plans in place for future funding of a major health endowment.

**2006/07** The Foundation received gifts of \$100,000 for the Bell Tower Park and \$70,000 for the purchase of a new Casa bus. 174 donors contributed \$161,240 to the "We Care" campaign for resident hardship.

**2008/09** The Resident Hardship Endowment grew from \$66,544 to \$198,971. Resident gifts provided support for the purchase of a wheelchair-modified van.

**2010** Adrian Newman provided 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 grew to over \$7 million. Foundation scholarship endowments increases to twelve and endowment funds grew to over \$5.5 million.

**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.

**2019/20** Cynthia Steiger retires after 23 years of service as the Foundation Fund Development Advisor.

**2021/22** A scaled model of the Casa de las Campanas is unveiled to the delight of everyone.

**2023** A new Electric Shuttle Cart was purchased by the Foundation to assist the Casa with their marketing efforts.

*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.*

*Casa caregivers enrich the lives of residents by enhancing their quality of life through compassionate care, thereby giving peace of mind to their families and loved ones.*

*"Milestones" is an acknowledgement to the hundreds of donors, volunteers, staff, and friends who have significantly influenced the progress and development of the Casa Foundation, Inc. since its inception in 1994 through 2023.*

*As the early directors envisioned, gifts made to the Casa Foundation have helped to augment programs and services for the benefit of residents.*

*Over the years, donor generosity and interest have initiated the establishment of a variety of funds which help 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 has 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 model for all nationwide retirement living facilities, Casa de las Campanas has displayed continuous accomplishments in the Rancho Bernardo community, as well as the San Diego County and the State of California.*

*"The unselfish effort to bring cheer to others will be the beginning of a happier life for ourselves.*

*- Helen Keller*



18655 West Bernardo Drive  
San Diego, California 92127  
858.592.1898

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Milestones  
C A S A F O U N D A T I O N

