

All Photos By: Rick Simpson

... 2021 ANNUAL REPORT ...

Impact & Outcomes



Rose Villa
Foundation



Dear Rose Villa Foundation Supporters,

Yes, we sure have been through it the past couple of years but there is so much to celebrate as we move through 2022.

- We have seen substantial growth of our invested resources
- We are welcoming new members to our dedicated and high functioning Board of Directors
- The Foundation has a new and deeply experienced leader in Cheryl Franceschi
- This provides a very strong start to our next year!

Through this annual recap of 2021, we'll share how the work tees up a strong commitment to deeper engagement with our community on all levels going forward. The constant influx of new residents (with quite a large group to come later this year) presents opportunities to be more transparent and clearer in our communication of the mission, values, and all the ways in which the Foundation positively impacts the Rose Villa community.

This impact report should paint a detailed picture of how we continue to support and improve the lives of all Rose Villa residents past, present, and future, pandemic or not.

Thank you for your interest and support of the work we are accomplishing. I encourage you to come to Foundation activities, ask questions, and participate to the level you are called to – the Foundation represents all of us, working together, to create the best future possible for this community.

Best wishes for a fulfilling 2022!

Vassar T. Byrd
Vassar T. Byrd, Treasurer
Rose Villa Foundation

2021 BOARD OF DIRECTORS

Officers

Elliot McIntire
President
Resident

Joan Clark
Vice President
Resident

Betty Hosakawa
Secretary
Resident

Vassar T. Byrd
Treasurer
CEO of Rose Villa

Members

Jennifer Allen
Resident

Kate Dins
Resident

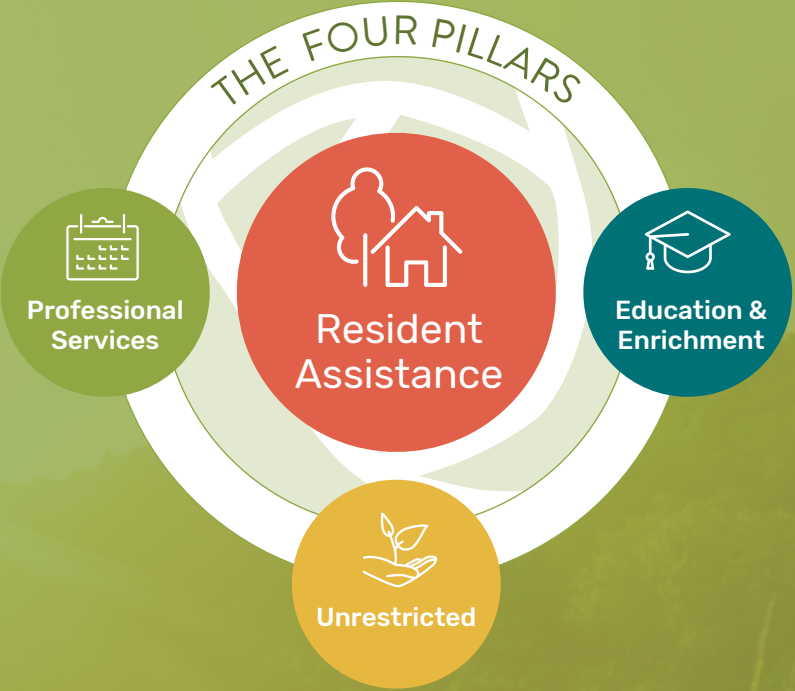
Bill Cunitz
Past President
Resident

Ken Dodge
Oregon Commission for the Blind

Peter Eddy
Resident

Marna Flaherty-Robb
Kaiser Permanente
(Retired)

Don Lehman
Resident



WHAT IS ROSE VILLA FOUNDATION?

- A nonprofit organization, separate from Rose Villa, Inc. but closely aligned.
- Services and programs that benefit current and future Rose Villa residents
- A volunteer Board of Directors, managed by a professional director.
- Hundreds of individuals who give generously to ensure that current and future Rose Villa residents stay in their homes.

OUR MISSION

The mission of Rose Villa Foundation is to support independence, advance well-being, empower residents, and inspire our community to build a better future for all generations.

OUR VALUES

- Dedicated to supporting quality of life for Rose Villa residents
- Aids residents experiencing unexpected circumstances
- Encourages generosity for the well-being of others
- Grows and promotes community wellness & learning



Rose Villa resident Nancy Rempe and her caregivers are delighted with her new LifeBio book, a deep dive into an interesting life, well lived.

PROGRAMS & SERVICES HIGHLIGHTS 2021

LIFEBIO PROJECT SHINES LIGHT ON MADRONA GROVE RESIDENTS

Madrona Grove Activities and Restorative Coordinator Mariana Iverson was excited to learn about the LifeBio program, designed to engage participants by capturing their life stories. She realized that the process of telling, sharing, reminiscing, and capturing their own biographies would positively impact wellness and impact care for residents, their families, and their caregivers.

Rose Villa Foundation sponsored the production of LifeBio books for ten Madrona Grove residents, compiled with input and photos from residents and their families. The time investment yielded beautiful bound books of memories. In addition, caregivers are aided with tools that help engage those they care for in deeper and more meaningful ways. LifeBio materials provides prompts that staff use to spur recollections, recall fond life moments, and generate smiles all around.

EDUCATION & ENRICHMENT WAS POPULAR ONLINE

Beginning in 2021, RVF's Education & Enrichment committee divided up and shared responsibilities previously held by the departed director. The team continued to provide popular presentations and workshops online during COVID restrictions, offering nine programs throughout the year. We were fortunate to draw on the expertise of several residents who delivered excellent presentations.

Topics varied from wellness issues like hearing, sleep, and sugar consumption, to computer and apps fundamentals, to sessions on email security and phishing. A presentation on Health Care Services provided by Rose Villa's staff was highly attended. Zoom presentations were recorded and posted for later viewing on the Foundation section of TouchTown, allowing for more people to view them at their convenience. Special thanks to RVF Board Member Don Lehman for hosting and managing the technical aspects of Zoom and for posting the recordings.

STAFF EDUCATION ASSISTANCE ADDS VALUE TO LEARNING

While the pandemic raged, several staff members were able to augment their work experience with education thanks to Rose Villa Foundation. RVF assisted five staff in 2021, including Kristina DeLisle, Michelle Jazuk-Hayward, Kari Leshner, Katherine Litan, and Rachel Trump. With financial assistance, they strengthened their value to Rose Villa residents with advanced learning that supports their work.

ROSE VILLA FOUNDATION WELCOMES A NEW DIRECTOR

After nearly a year without a director, Rose Villa Foundation hired Cheryl Franceschi to lead operations, fundraising, communications, and marketing to build the foundation for the future. Cheryl brings years of successful experience to Rose Villa, having served as a development officer, relationship manager, and marketing communications strategist for Providence Health & Services, Concordia University, QUAD, Inc., Syracuse University, and most recently Dalat International School in Penang, Malaysia.



THANK YOU DONORS!

The following generous individuals supported Rose Villa Foundation through the Pacesetters Club, through events and programs, with gifts of vehicles and pavers and securities, by making one-time gifts, or in their estates using charitable gift annuities or bequests.

- David & Jennifer Allen

Inge Angiletta

Nancy Barrett-Dennehy

Kirk & Molly Beiningen

Darlene Benjamin

Gene & Joan Berry

Kate Birdsall

Janet Blakeman

Nancy Bley

Hans Blom

Elaine Bloomquist

Carol Bosworth & Pat Matthews

Arlin & Cynthia Brown

Carol Brownlow

Doris Burkland

Patt Callender

Patti Campbell

Amy Carmona

James & Carol Carthel

Miriam Chitty

Joan Clark & Susan O'Dell

Jean Coberly

Barbara Coenen

Evelyn Cole

Jerry & Jean Corn

Jeanne & Bill Cozine

Bill Cunitz & Lee Nolet

Kate Dins & Val LeGault

Dave Dobak

Andrea Drury

Jack & Pam Duren
- Peter Eddy

Arthur Ellickson

Arthur & Bitsy Emlen

Estate of Muriel Ganopole

Estate of Jennie Mae Stearley

Loraine Failor

Cheryl & Terry Franceschi

Walt & Pat Garvin

Diane Gibson

Philip & Helen Goodrich

Marilyn Gottschall

Ruth Gregg

Sue Griffin

Marianna Grossman

Hank Hadaway

Margaret Hamilton

Katherine Hamilton

Judie Hansen

Debbie Herr

Herb Hill & Marilee Thome

Robert Holt & Marie Jennings-Holt

Patricia Horan

Eleanore Hunter

Sheila & John Jakobsen

Ricky Jamtgaard

Gwen & Don Jenkins

Joyce & Brad Jensen

Dori Jones

Gail Katagiri

Kevin Kenny

Judith Kenny & Thomas Hubka

- Leanne Kerner & Dianna Shaffer

Charles Kerr

Darlene Larson

Julia Layden

Bob & Marilyn Lease

Martin & Diane Lee

Don & Caroline Lehman

Jean Lofy & Ed Gellenbeck

Helen Lyons

M.A. Malone

Mayo Marsh

Norma & Bynner Martin

Ann Martin

Joncile Martin

Nancy B. Martin



- Pat McAleer

Ed & Lisa McFarlane

Patricia McGaffigan

Sue McGraw & Bob Owens

Elliot & Marina McIntire

Ilene McMurray & Joern Eriksen

Pat & Wayne Medford

Kim Morgan

Steve & Karen Morris

Tina & Michael Moullet

Janet Murphy

Joan Noble

Judith O'Dell

Jane Olsen

Beverly Ormseth

Michael Ossar & Gretchen Holden

Kathleen Mary Passow & Colleen Cleves

Judy Perman

Judy Perry

Charlotte Peterson

Carl & Susan Petterson

Kathy Phelan

Mary Claire Phelan

Mary Pleier

Bill & Dottie Rector

Kikue Rich

Carol Richie

Philip Riedel & Carolyn Bailey

Alice Ringquist

Bud Robinson

Ron & Joanne Rombalski

Nancy Rorden

Delores Saunders

Walt Schaffer

- John & Brenda Schallberger

Cathy Schar

Bill Scheible

Otto & Marietta Schlumpf

Kay Schmerber

Holly Schmidt

Cathy Schwabe & Vita Sorgi

Joe & Carolyn Shacter

Sally Sharrard

Becky Shriver

Rick Simpson

Ron & Kay Slusarenko

Brad & Joann Smith

Dick & Mary Deane Smith

Patricia Snider

Janet Strickland

Roger & Mary Swick

Carolyn & Rowdie Tamblyn

Zoe Taylor

Joan Taylor

Lynn Thomas

Suzanne Townsen

Helen Umberger

Dayle Uyeda

Kelly Voit

Jan Wainscott

Doug & Jean Walker

Paul & Judy Wathen

Jude Watson & Sue Matranga-Watson

Mo & Lois Weathers

Bob Weisman & Ruth Ross

Marilee & John Wetten

Louise Williams

Byron Windhorst

Ed Zack & Betty Hosokawa

Edna Zenger



- Companies:

Amazon

Giving Forward

HUB International

Jedeikin Holdings, Inc. dba DaVinci Digital

Oregon Beverage Recycling Cooperative

The Kroger Company

The Oregon Community Foundation

Please forgive any errors or omissions in this list

Become a member when you share your intention to support Rose Villa Foundation in your estate plans. This group of visionaries recognize and celebrate their wise decisions together!

BEQUEST: “ I GIVE AND BEQUEATH...”

A bequest made to Rose Villa Foundation in your own will or trust allows you to leave your legacy of support for those who come after you. Rose Villa Foundation experiences its most substantial growth when people leave a gift in their wills.

CHARITABLE GIFT ANNUITY: INCOME FOR LIFE

Arrange an annuity with the Rose Villa Foundation to assure a fixed quarterly income for the remainder of your life at a rate based on your age. Those age 70 and above can establish an annuity with a minimum gift of \$12,000.

GIFT OF ASSETS OR INSURANCE POLICIES

If left in your estate, some holdings and insurance policies are subject to income as well as other estate taxes. This makes them poor assets to pass to loved ones, but excellent choices to use for a charitable estate gift. Using the “beneficiary designation” for your qualified retirement plan account or IRA, you can use excess retirement funds to make a convenient and cost-effective charitable gift to Rose Villa Foundation.



Please contact RVF to initiate a bequest or estate gift, to notify us if you have already made one, or if you are interested in the Charitable Gift Annuity program. Call Cheryl Franceschi at 503.652.3075 or email cfranceschi@rosevilla.org.

ROSE VILLA FOUNDATION

OPERATING INCOME	2021	2020
Contributions, Bequests, Fall Appeal	\$109,643	\$51,547
Gift Annuity Donations	-	-
Treasure House Contributions	18,500	15,500
Events & Activities, Net of Expenses	4,096	44,552
Pacesetters	28,202	30,255
Total Revenues	160,441	141,854
PILLAR/PROGRAM EXPENSES		
Assistance to Residents	1,261	5,901
Education & Enrichment Programs	900	1,606
Professional Services/Financial Coaching	615	1,331
Unrestricted/Board Designated/Scholarships	7,357	13,703
OTHER EXPENSES		
Services Purchased from Rose Villa	52,227	76,896
Board & Administrative Expenses	1,299	1,182
Audit and Tax Expense	9,600	9,500
Other Operating Expenses	3,462	7,262
Total Expenses	\$76,721	\$117,381
Net Operating Surplus	\$83,720	\$24,473
Investment Earnings, net of Fees	\$938,889	\$445,758
Total Net Surplus	\$1,022,609	\$470,231
Invested Assets, end of year	\$7,233,031	\$6,174,390

For the Years Ended December 31, 2021 and 2020 (unaudited)

Note: The RVF Board of Directors’ current Spending Policy is set at 3.5% of the total investment assets.



VOLUNTEER-DRIVEN ACTIVITIES

Volunteers provide many resources and support for all of RVF’s Pillars, and have a great time doing it! Thank you for loving the Rose Villa Community!

THE TREASURE HOUSE

Of course everyone knows that this is the best place in Clackamas County to find quality used goods and bargains! Volunteers at the Treasure House, however, go well beyond just selling used goods as they re-gift items to other local charities who put them to good use. Dozens of active community volunteers participate in Rose Villa’s longest-operating funding source, **raising nearly \$40,000 in 2021** to benefit Rose Villa.

TUESDAY MARKET

Many growers, bakers, crafters, cooks, and entertainers make Tuesdays our favorite day of the week from summer through fall! Volunteers show love to the community -- even during a pandemic -- by bringing their wares out to sell...and everyone benefits! **Over \$2,600 was donated** to RVF as a result of the generosity of volunteers and buyers.

RECYCLING CANS AND BOTTLES

What difference can a can make? Volunteers and staff collect thousands of cans and bottles every year; **a whopping \$2,600 was gifted** in 2021 to RVF, one bottle at a time! You can join in by placing your refundable drink containers in the bins next to trash containers. Please leave the labels in place so that they can get the full credit for your “gifts”!

DID YOU KNOW...

there are acts of generosity happening every week at Rose Villa, all to support good work of Rose Villa Foundation? Woodworkers, sewers, artists, dogwalkers, fix-it folks, the tech-savvy, and many more people donate their time and efforts turning gratitude into gifts to ensure that RVF is “always ready for the future.”

Thank you everyone!

HOW CAN YOU HELP?

Our community has a big philanthropic spirit... supporting each other and preparing for the future together. There are so many ways to make a difference!

THE PACESETTERS CLUB OF SUSTAINING DONORS

Members make a total annual commitment beginning at \$250 and receive various benefits of club membership. Monthly payments are easily deducted from a checking account or charged to a credit card, and Rose Villa residents can charge to their resident account. It’s a simple and important way to get involved and support the community!

GIFT YOUR REQUIRED MINIMUM IRA DISTRIBUTION (RMD)

If you are expecting a distribution that you don’t need, you want to avoid the taxes due, and your desire is to support RVF, this can be a good way to give.

DONATE YOUR VEHICLE

Donating an unused car or truck is simple to arrange, and comes with a tax deduction. One phone call or email is all it takes to start the pick-up process, and everyone benefits!

HONOR, REMEMBER AND CELEBRATE!

Remember meaningful moments in life with an engraved paver or a one-time or recurring financial contribution to the Foundation. Learn more online at www.rosevilla.org.

- **Commemorative Pavers** – your message, engraved on a paver planted in the garden outside the Wellness Center
- **Honor/Memorial Gifts** – remember and honor friends and loved ones

SHOPPING REWARDS PROGRAMS

Some simple, seamless shopping programs donate to Rose Villa Foundation when you shop...at no cost to you!

Link your **Fred Meyer Rewards Card** to the Rose Villa Foundation, and every time you shop at Fred Meyer with your card, the Foundation earns a percentage of your purchase! Visit fredmeyer.com/communityrewards. non-profit #94538.

Amazon will donate 0.05% of your eligible purchase to the Foundation when you shop at Amazon. Support the Rose Villa Foundation by shopping at www.smile.amazon.com. Enter Rose Villa Foundation in the search box before you shop.





THE TREASURE HOUSE

a resale shop since 1969

What will you find at The Treasure House?

- Unique merchandise arrives daily from residents and the community
 - Volunteer supported and operated
- Proceeds support the services of Rose Villa Foundation

Hours: Monday-Saturday: 1:00 pm - 4:00 pm

Location: 13505 SE River Road at Torbank Road
adjacent to Rose Villa Senior Living

Phone: 503.652.4008



**Rose Villa
Foundation**

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