



Foundation Focus

VOLUME 1, ISSUE 4

ANNUAL REPORT 2018



Dear Residents,

Many years ago *"friends"* of Jefferson's Ferry formed a Steering Committee to develop a philanthropy program in an effort to support the mission and vision of our Community. Those individuals had a passion for both philanthropy and their home at Jefferson's Ferry. Their efforts culminated into the creation of the Jefferson's Ferry Foundation, a New York non-profit, 501(c)(3) corporation.

For nearly fifteen years the efforts of the Foundation and its Board of Trustees have resulted in many notable contributions to life here at Jefferson's Ferry, including the annual Monte Carlo Night, the construction of the Community Center Porte Cochere, the spa program in the Vincent Bove Health Center, and the establishment of the Resident Assistance Fund, just to name a few.

This past summer the Foundation Board of Trustees agreed to go back to their roots by reestablishing a Steering Committee. This Committee will once again be made up of individuals having a passion for philanthropy and a desire to engage in fundraising efforts to support the mission and vision of our Community.

The Jefferson's Ferry Board of Directors has agreed to assist the Foundation in this transition by assuming the administrative and other corporate functions of the Foundation, thereby enabling the Steering Committee to focus its efforts on grassroots fundraising campaigns and donor development.

The role of the Steering Committee and its members will be to actively participate in fundraising programs and events to support Jefferson's Ferry and to promote benevolence by enthusiastically engaging and enlightening residents, families and friends to the power and spirit of philanthropy.

If you are interested in participating in the Steering Committee, please contact Kaylin Peterson, Director of Philanthropy, at extension 5507 or myself at extension 3072.

Sincerely,

Carol Fenter



MISSION:

Our vision for the Foundation is to represent philanthropic excellence, in our quest to implement an ethical program — striving at all times to promote philanthropy in an impartial, unbiased, efficient

way with a commitment to inclusiveness.

Contagious generosity and the ensuing feelings of satisfaction will be our ultimate intent.



VISION:

The Foundation shall work in partnership with Jefferson's Ferry Board of Directors and staff to promote and raise philanthropic funds to enhance services for our residents and staff, and to respond to the needs of our community.

The Foundation will promote benevolence by enthusiastically engaging and enlightening the residents, families, staff, volunteer leaders, and other interested people and organizations to embrace the power and spirit of philanthropy.

"WE MAKE A LIVING BY WHAT WE GET, BUT WE MAKE A LIFE BY WHAT WE GIVE" - WINSTON CHURCHILL

MAJOR DONOR WALL UPDATE

This year we had many people climb categories on our donor wall. We had **28 donors upgrade** to a higher category and **6 new additions**.

We also changed the title of the "Friend" category to "Pioneer".

The new donor panels for 2018 have been installed. Be sure to stop by the Community Center to check it out! Is your name up there? If not, and you would like it to be next year, please contact Kaylin Peterson at ext. 5507.



A FRIEND IN NEED IS A FRIEND INDEED

In 2018, the Jefferson's Ferry Foundation raised \$104,635 towards the Resident Assistance Fund through the generosity of our donors.

The Foundation utilized over \$51,000 to support our residents in need. This fund is constantly being put to use each month.

Every donation counts, no matter how small. Our goal is to raise enough money for this fund so it can be self-sustainable.

WINTER OLYMPICS CHAMPIONS

On Tuesday, February 20, it was game on in the Bove Health Center! Several residents gathered to compete in the 2018 Winter Olympic Games. Games sponsored by the Foundation included: javelin throw, curling and long distance throw. All participants were awarded medals for doing so well. The Recreation Department did a fantastic job of putting together all of the Olympic-themed games, and the residents had a blast!



BACK TO SCHOOL!

The Foundation is pleased to say that we provided *over \$6,000* in educational assistance to our staff this year! This includes funding for both textbook and tuition reimbursement. As you can imagine, textbooks can be pretty costly. The staff are very appreciative of this opportunity.



IT'S THE MOST WONDERFUL TIME OF YEAR

The Staff Holiday Gift Fund had a record breaking total of \$201,000 in 2018! Arlene Kaufman worked very hard to make sure she reached her goal of \$200,000.

Contributions made by residents and their family members help to make the holidays bright for our hardworking staff members.

The Residents Council enjoyed seeing the staff's "Crazy Holiday Hats" and were able to vote for their favorites. In the end, first place went to Judy Ehlers, Jamie Schilling took second and Joanne Lehmann came in at third place.



SMARTBOARD COMES TO THE VINCENT BOVE HEALTH CENTER

The Health Center Recreation Department was very happy when the Portable Lite Touch System arrived! This device will allow for residents to interact in ways they couldn't have before. The screen display is 65 inches for easy viewing ability. This system is touch-screen ready so the residents can play games and activities right on the screen! Donations made to the Capital Improvements Fund enabled the Foundation to support this wonderful device.



LASURDO'S LEGACY UPDATE



Since Lasurdo's Legacy was started in January 2017, 44 plaques have been purchased for friends who have passed away at Jefferson's Ferry.

Be sure to stop by the Vincent Bove Health Center and

take a look at our Celebration of Life Tree and how it has grown.

If you would like to purchase a plaque for your loved one, please contact Kaylin Peterson at ext. 5507.



MONTE CARLO GATSBY GAMBLE

Our 15th Annual Fundraiser, Monte Carlo Gatsby Gamble was a roaring success! We we're able to raise over **\$82,000** towards Resident Assistance!

Our guests had a great time as they listened to a live Jazz Band and danced the night away. The raffle baskets were a big highlight of the event with many happy winners!

We hope to see you at the event this year! Save the Date for **Saturday, September 21, 2019.**



The auctions are back!

The Foundation will be bringing back the auctions! We will be trying to limit the auctions to once a month. If you have something you would like to donate, please contact Kaylin at ext. 5507.

Please understand you might be put on a waitlist if we have too many items.



Did You Know?

In 2018 alone, the Jefferson's Ferry Foundation raised **\$12,393.94** towards the Resident Assistance Fund through the Employee Auctions!

WAYS TO LEAVE YOUR MARK ON JEFFERSON'S FERRY FOUNDATION

Since introducing the Commemorative Bench program in July of 2016, **we have sold a total of 22 benches!** Needless to say, this program has become popular among residents. There **are only 11 remaining** if you would like one of your own.

In addition to the benches, we have the Commemorative Tree Program in which we place a beautiful plaque in front of one of the Ornamental Pear trees that line Mather Drive.

Perhaps you have seen them as you are walking around the community.

The Celebration of Life Tree is another wonderful way to commemorate a loved one. The Celebration of Life Tree is displayed in the Vincent Bove Health Center in the Main Lobby. Plaques may be customized with the wording of your choice.

You may also make a cash donation to any one of our five funds in honor or in memory of a loved one. If you choose, an acknowledgement card will be sent to the family member notifying them of your kindness.



Pictured above are the grandkids of a resident on the bench they named in his memory.

PAINT NIGHT!

We had a Paint Night fundraiser in July to benefit Health and Wellness programming. As you can see, everyone did a great job on their paintings! We were able to raise over \$500 through this fun event! We hope to see you at the next one!



UPCOMING EVENTS:

Major Donor Cocktail Reception

June 2019

Monte Carlo 2019

George F. Rice
Community Center
Saturday,
September 21, 2019

B-I-N-G-O

The Foundation had the pleasure of sponsoring the Bingo prizes in June. The residents really loved the opportunity to “shop” for their gift of choice.



PING PONG ANYONE?

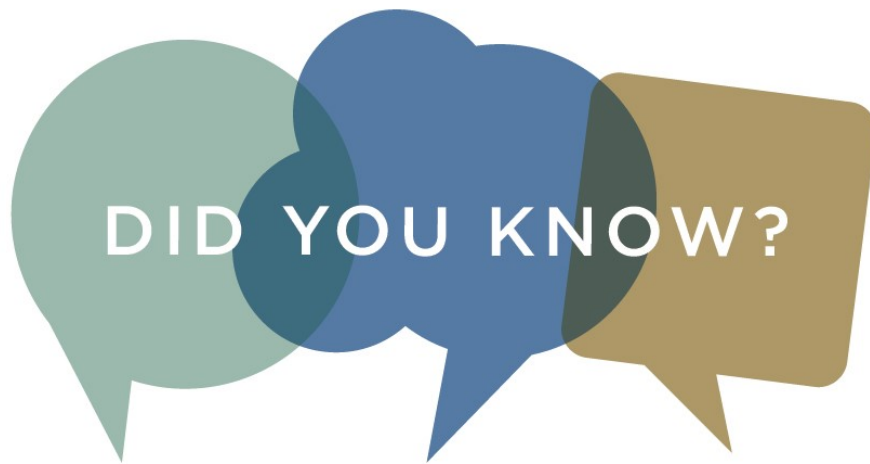
The Foundation was able to purchase a brand new Ping Pong table for the Independent Living residents through contributions made to the Capital Improvements Fund. The residents enjoy playing against each other.



FOREVER YOUNG

For Field Day this year, the Foundation sponsored the Table Pong and Flip Cup tables. The residents were able to channel their inner college days as they competed against their friends to see who still had what it takes to be the champ! The residents loved it!





You can make a large gift to the Foundation, get credit for it now on our donor wall but ***pay it over time?***

For example: Mary wanted to make a \$5,000 gift to the Resident Assistance Fund to help her fellow neighbors. However, she wasn't in the position to give it all at once. Mary opted to make a pledge in the amount of \$5,000 over 5 years time. She will make one \$1,000 payment each year until she reaches \$5,000 in year five. Mary will be able to claim her gift of \$1,000 each year on her taxes AND get her name on our donor wall in the Community Center at the \$5,000 level.

If this sounds like something you may be interested in, please stop by the Foundation office (located across from the back exit of the Theater on the second floor) or call Kaylin Peterson at extension 5507.



Please consider making a gift to any one of our ongoing funds listed below.

General Fund

Through the Jefferson's Ferry Foundation, there are many ways that you can contribute to making Jefferson's Ferry an even better place to live and work.

A gift to the general fund will allow for the Foundation to apply your gift to the area of greatest need.

Resident Assistance Fund

The Resident Assistance Fund is an area of great importance to residents of Jefferson's Ferry. By making a gift to this fund, you will be providing financial assistance for residents of Jefferson's Ferry who have run out of money through no fault of their own.

Health and Wellness Programming

Wellness is a combination of many aspects that strengthen and enhance the mind, body and spirit. A gift made to Health and Wellness Programming will support the entire human experience, encompassing the primary elements of a healthy lifestyle: emotional, intellectual, physical, social, spiritual, occupational and environmental wellbeing.

Employee Education and Assistance Fund

A gift made to the Employee Education and Assistance Fund provides staff with the opportunity to further pursue education in their field, reimbursement for textbooks and hardship loans in time of need. Often residents use this as a method of giving back to the staff for the care they were provided, as tips are not accepted at Jefferson's Ferry.

Capital Improvement Fund

Gifts made to this fund will aid in various building projects such as expansions, improvements, and updates in technology.

Planned Giving Opportunities

The Jefferson's Ferry Foundation offers many great opportunities to leave your mark on Jefferson's Ferry

Charitable Gift Annuity

Retain income benefits from the assets you give to Jefferson's Ferry and thus afford a larger gift. When you create a charitable gift annuity or charitable remainder trust, you will receive income, a charitable deduction, and diversify your holdings. You can reduce high tax liability now while gaining additional income.

Entrance Fee Gift

The entrance fee for most residents can be pledged as an irrevocable gift to the Jefferson's Ferry Foundation. This may result in a substantial tax deduction for people that itemize on their tax return. For residents making this type of bequest, there may be significant tax planning opportunities with no out-of-pocket expense.

Partnership Interest

Avoid capital gains liability on the transfer of a business or partnership interest. You can contribute the partnership interest or closely-held stock to the Jefferson's Ferry Foundation. You will receive an income tax deduction for your gift.

Life Insurance

Create a new life insurance policy or donate a paid-up policy you no longer need. This will increase your ability to make a significant gift to Jefferson's Ferry.

Deferred Gift Annuity

Establish a deferred gift annuity and take a larger deduction at a higher income rate than other life-income gifts.

Real Estate Gift

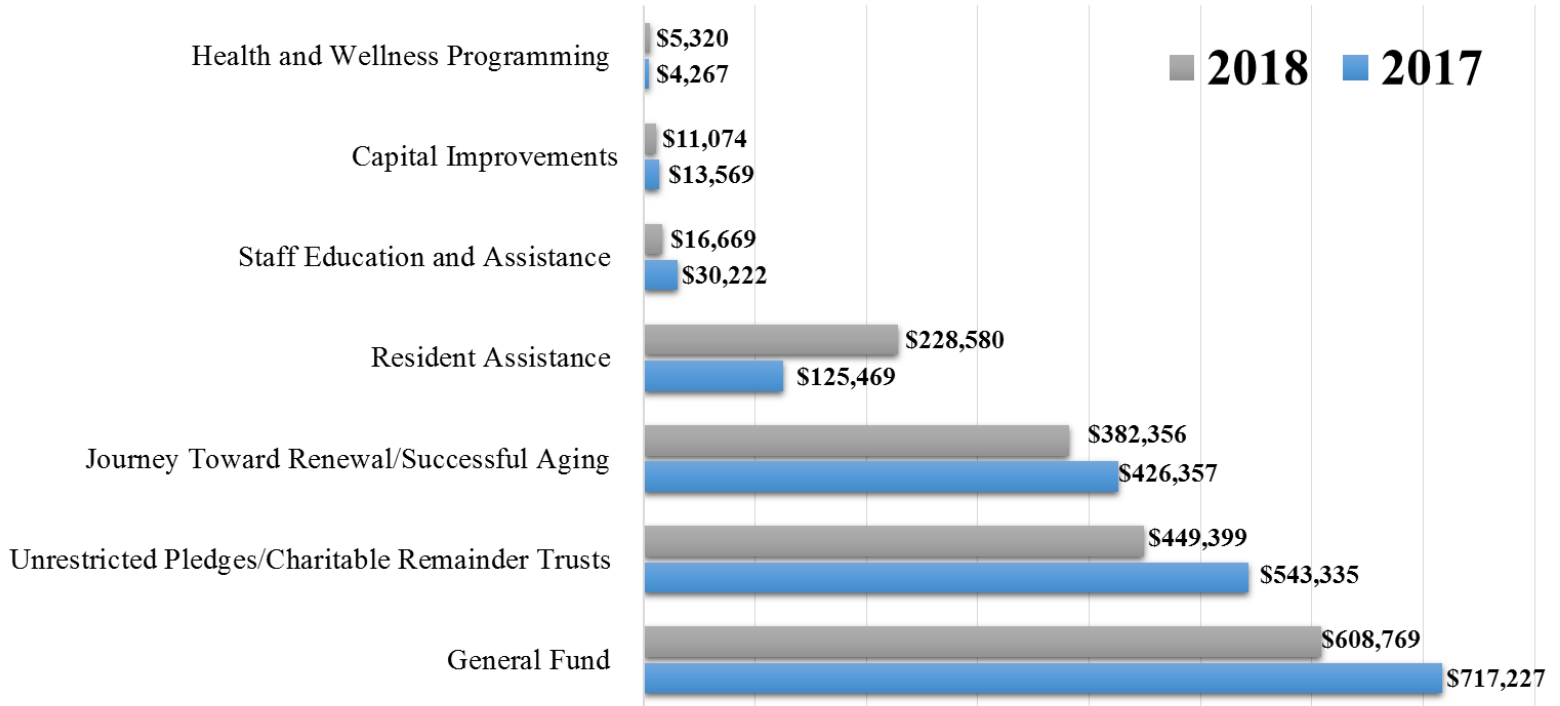
Make a gift of real estate to the Jefferson's Ferry Foundation and avoid capital gains tax. Receive an income tax deduction and enjoy the option of a gift that doesn't affect your lifestyle.

Charitable Lead Trust

You can reduce gift and estate taxes and control the timing of passing assets to your children, grandchildren, and great-grandchildren. Create a charitable lead trust for a fixed, finite period with the principal going to your heirs. Reduce gift and estate taxes and freeze the taxable value of growing assets before they pass to your family.

DECEMBER 31, 2018

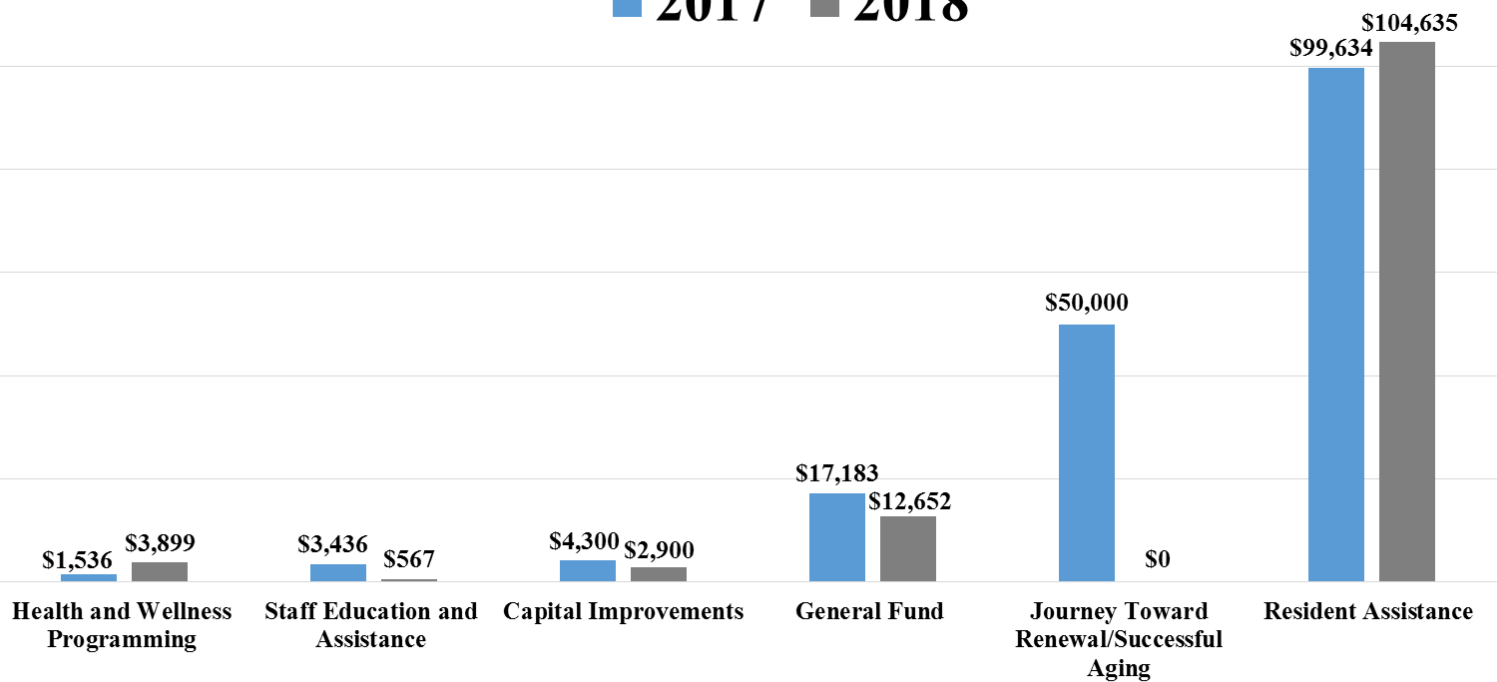
FOUNDATION FUND BALANCES



TOTAL NET ASSETS
AS OF DECEMBER 31, 2018
\$1,712,242

2018 CONTRIBUTIONS RECEIVED

■ 2017 ■ 2018



Total Contributions Received in 2018: \$124,653





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