



2020 - 2021 FOUNDATION REPORT

# Empower



*Now more than ever, in these extraordinary, unprecedented times, we seek to empower current and future Vantage Point residents*



## A letter from the **Foundation Board President**

**D**ear Vantage Point Residents and Friends:

Greetings, and thank you for your part of our shared sacrifices during the past months of the pandemic. Now let me get right to the point. When we ask people to empower the Vantage Point Foundation with their funds, we usually hear these two questions. First, what has the Foundation been doing to support the residents of Vantage Point? Second, if I make a gift to support the Foundation, how can and will my funds be used?

These are fair questions. This report is designed to answer them, and to thank once again the many donors who have already supported the Foundation. This year, the Foundation Board has realigned our endowment into three funds. The Vantage Point **Community Support Fund** enhances **facilities and programs** for the benefit of all residents. For example, this year we funded the Vitascan Bladder Scanner to reduce the number of trips to the hospital. We have also funded a freshening of the Cedar Place public areas, but the results won't show until the pandemic is over. The **Staff Support Fund** helps **staff members** with their career growth, and in times of family tragedy. The **Resident Support Fund** helps **individual** residents in personal financial need.

You can choose to designate your gift to support any one or more of these endowments. Undesignated gifts are put toward the areas of greatest need at the time. We also anticipate periodic capital campaigns. Many rooms and areas at Vantage Point can be named in honor of someone you love. Please ask us about this opportunity. The Foundation also facilitates non-endowed gifts that can support initiatives that are important to residents, like Sidwell Garden as well as social and cultural events.

The year 2020 has reminded us painfully that it takes heart and courage to move through these difficult times. It also takes money. Beyond entrance deposits and monthly fees, Vantage Point needs money to build and enhance for the future in a planned way, to hold down the annual increases in monthly fees and to make it through unplanned hard times, such as the pandemic. We ask for your generous help with these goals. For 2020 only (unless extended by Congress), you can give up to \$300 to charity and deduct it *even if* you are taking the standard federal tax deduction.

I am grateful for your taking the time to read this comprehensive report. May you come away with a greater understanding of the Foundation. May it lead you to reflect on who, and what, are important in your life and worthy of your help.



**Mark Bobotek**  
Board President,  
Columbia Vantage Point Foundation

## MISSION

Raise funds to: 1) Continuously *enhance* current resident quality of life, meeting their unique and *evolving* needs; and 2) Build endowments for the future to help financially *sustain* residents and strengthen the community.

## VISION

*Connected* to Columbia and Howard County, the Columbia Vantage Point Foundation is *forward thinking* in providing stability and enhancing the lives of Vantage Point residents in a stimulating and caring environment.

## A letter from the **Foundation Executive Director**

**A**s the first Executive Director of the Columbia Vantage Point Foundation, it has been my privilege to work closely with the Board in writing the Foundation's first mission, vision and values statement, as well as its first Strategic Plan. In establishing the first Legacy Society, we received gifts of \$1,000 or more from over a dozen community members. And, while many of the Foundation's plans for the year (e.g., the "Joy of Art" Event) were upended by the COVID-19 pandemic, we have been heartened by the incredible leadership of Vantage Point staff and support of Life Care Services in maintaining a safe residential environment during these trying times.

The Foundation's continuing goal of providing financial support to maintain a high level of care for Vantage Point residents along with a wide range of engaging social and cultural activities in their daily lives is more important now than ever. As the Board and the new Resident Outreach Committee engage with the community to foster understanding of the Foundation's role and the importance of growing the endowment, we hope residents will continue to support the Foundation financially to have a positive impact on the community now and into the future.



**Sara Noon**  
Executive Director, Columbia Vantage Point Foundation

*In 1981 I was having some health concerns and decided after 40 years in Columbia, I definitely wanted to stay, but it was time to give up the work of owning a home. I visited several CCRC's and when I came here and hung out in the Marketplace, I was so impressed with what I observed of the residents. I also noticed the "feel" of the facility as well as the comfortable interactions of the residents. I moved in and knew I'd made the correct choice. When I heard that a Foundation was to be developed at Vantage Point, and believing in Foundations, I immediately got out my checkbook and became a Legacy member. I am excited that we can make enhancements in our home as well as ensure that future residents will also enjoy the experience we are enjoying.*



– Ms. Ruth Nolan



*A little more than five years ago when Patty and I decided it was time for us to relinquish the responsibilities and expense of maintaining the house that had been our home for 43 years, our goal was to change where we live, not how we live. Until the already infamous 2020, when everyone has had to make some changes in how they live, Vantage Point made that goal attainable. But even during these troubled times, we agree that there is no place where we could feel safer and better cared for than the Residences at Vantage Point. So it is with the confident expectation that the Foundation will be a major force in maintaining and even improving conditions at Vantage Point and the surrounding community that we chose to become Legacy Donors to the Vantage Point Foundation.*

– Dr. Michael Glasgow

## FY2020 Key Accomplishments:



**The Board created the inaugural Legacy Society** recognizing resident and family gifts of \$1,000. Once a resident/family is a Legacy member, recognition is in perpetuity.

**The Board allocated over \$85,000** from the Foundation endowment fund to support the following key initiatives:

- \$52,000 toward new Cedar Place flooring and new furniture and décor in the Cedar Place Activity Room
- \$6,200 toward Hearthstone re-certification
- \$8,600 toward staff COVID bonus
- \$10,000 toward the new "Live Where You Work" program
- \$10,000 toward purchasing the Vitascan Bladder Scanner

**The Foundation raised \$17,025** with gifts from both the 13 Legacy Society Members and additional resident community donations to grow the Foundation endowment as well as support the Cedar Place décor improvements.



**The Board developed and approved** the first Columbia Vantage Point Foundation mission, vision and core values statements, along with the first Strategic Plan covering the period 2019-2022.

**The Board established the Resident Outreach Committee** with the purpose of reaching out to residents to help educate them on the mission and purpose of the Foundation. Committee members include Michael Glasgow, Leon Rosenberg, Bernice Kish and Paula Rasera, along with Foundation Board members Susan Buswell and Ruth Nolan.

**Established the first Foundation sponsorship of the "Joy of Art" event.** To promote community engagement, the Board initiated plans for a "Joy of Art" event scheduled for April 2020 but it got put on hold due to the pandemic. The Board approved \$10,000 to support this event, including a catered preview party.



### FOUNDATION HISTORICAL RESIDENT COMMUNITY ALLOCATION SUPPORT TIMELINE

#### 2010

Purchased three 40" flat screen TV's for the Café and lounge areas

#### 2011

\$5,000 toward auditorium sound system improvements

#### 2012

- \$2,000 toward Vantage Point WiFi upgrade
- \$4,000 toward staff memory care education (*Winter Growth dementia training*)

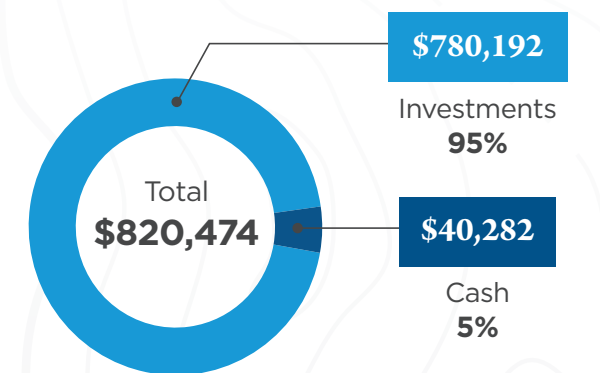
#### 2013

- \$15,000-16,000 toward improvements to fitness room and rehab equipment, and programming to support wellness initiatives
- Additional \$2,000 for Library bookcases

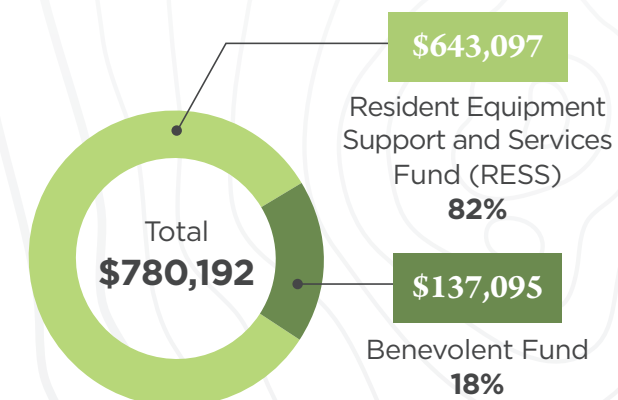
#### 2014

\$22,500 toward the Hearthstone program that promotes training to staff on how to be aware, skilled, effective and confident working with older people that have cognitive challenges

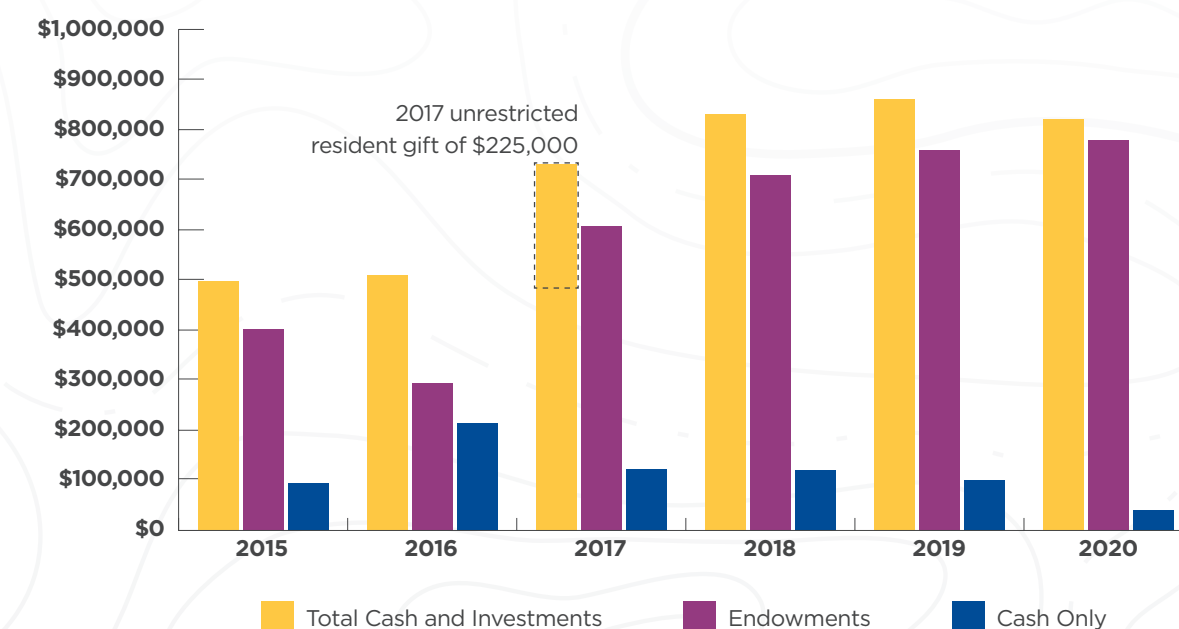
## FY2020 Cash + Investments



## FY2020 Investment Funds



## Columbia Vantage Point Foundation Historical Investments



The Residents Association has been essential in helping to grow the Foundation endowment over the past decade. A combined \$400,000 was shifted to the Foundation endowment, giving the Foundation operational oversight of the Residents Assistance Fund in 2018.

#### 2015

\$11,000 toward the Vantage Point WiFi upgrade project

#### 2016

\$2,175 toward staff memory care education (*Second Wind Dreams Virtual Dementia training*)

#### 2017, 2018 & 2019

Funded \$200 annual membership fee for staff memory care training (*Second Wind Dreams Virtual Dementia training*)

#### 2020

- Allocation of over \$85,000 approved by Foundation Board for:
- Vitascan Bladder Scanner - diagnostic tool for on-site diagnosis of urinary tract infections
  - Annual membership fee for staff memory care training (*Second Wind Dreams Virtual Dementia training*)
  - Cedar Place flooring and activity room décor upgrades
  - Staff COVID bonus
  - Hearthstone renewal
  - Staff recertifications

#### 2021

Implement the new "Live Where You Work" program to subsidize eligible employee housing in downtown Columbia

I moved to Vantage Point a bit more than 10 years ago. My life here has only gotten better as the years have passed. The fellow residents I have met, the caring and friendly staff, and the attractive and active surroundings of Columbia combine to produce a happy life. I supported the Columbia Vantage Point Foundation with a Legacy gift in FY2020 to help grow the Foundation endowment so future residents can have the same happy life and quality of care that I have experienced at Vantage Point.

– Dr. Leon Rosenberg



Although we are all experiencing very difficult times during the pandemic, I am pleased to be involved in the establishment of the Columbia Vantage Point Foundation. A well-funded Foundation, to which I have donated, will provide for activities now and in the future. It will also support needs of both the staff and residents.

– Ms. Susan Buswell

## The Path Forward

We happily celebrated the 30th anniversary of Vantage Point in October 2020. Today, as we look forward to FY2021, we recognize the critical importance of educating residents and families on the Foundation's purpose of providing financial support for the current and future Vantage Point community.

The Board will be looking to more significantly increase funds in FY2021 and beyond to grow the following three primary endowments, which are a reallocation of the RESS fund:

- 1 Vantage Point Community Support Fund:** Enhancing Vantage Point community facilities and programs.
- 2 Staff Support Fund:** Supporting staff development and emergency needs.
- 3 Resident Support Fund:** Supporting individual resident needs.

Currently these three endowments total \$780,192 and it is the year-to-year growth (approximately 4%-5%) that is allocated to significant initiatives like the \$52,000 Cedar Place upgrades from the Community Support Fund. The Staff Support Fund supports both

employee education and recertification, along with the new "Live Where You Work" program where the Vantage Point Foundation and The Columbia Downtown Housing Corporation will subsidize two downtown Columbia apartments in 2021 so the eligible employees can live near Vantage Point.

Importantly, heartfelt gifts to the Foundation's endowment make a significant difference in the amount of money that the Foundation can allocate to support the current and future VP resident community. These types of gifts, managed with a financial planner, can be made through a will, living trust or dedicating a percent of the resident entrance deposit refund to be left to the Columbia Vantage Point Foundation.

The Foundation will also be looking to establish shorter term restricted funds to recognize the legacy of residents to support social and cultural events like music performances, fine arts shows, educational speakers, and the like. We will also continue to fundraise for the Sidwell Garden fund.

The Board and Resident Outreach Committee are looking forward to working with Vantage Point residents and their families, along with the surrounding community, to raise funds to grow the Foundation endowment and shorter term legacy funds.

## Historical Fiscal Year Gifts (through June 30, 2020)

### FY2017 DONORS

#### Memoriam Gifts

Evelyn Shulman in memory of June Roper, Mildred Matteo, Martha Gold, Isaac Aksma, Elizabeth Kinney, Adele Weinberg, Mary Butler, Anna Rosenberg, and Ethel Ward

Judy and Mac Rivkin in honor of Marty Fagan

Eric Katkow in memory of Gloria Wolfson

Roy and Susan Appletree, on behalf of Lillian Herzenberg, in memory of Leslie Glassberg

May Ruth Seidel in memory of Ethel Ward

Albert Ward, Jr. in memory of Ethel Ward

#### Endowment Gifts

Billie Weaver and Evelyn Shulman  
Miriam Weintraub

Joan E. Martin Trust  
Margaret Johnson

### FY2018 DONORS

#### Memoriam Gifts

Evelyn Shulman in memory of Almeda Wrenn, Mary Lou Schon, Gertrude Paul, Doris Anderson, Ruth Butcher, Esther Alford, Celia Weinberger, Carol Henningsen, Gloria Pollack, Ursula Marx, Joseph Pollack, Nancy Haywood, John Springer, Miraim Weintraub, Martin Fagan, and Elizabeth Hawkins

Patrick Carroll in memory of Carol Henningsen, David Cowie, and Evelyn Lustbader

Marcia Thomas in memory of Martin Fagan

Marilyn Donovan in memory of Marty Fagan

Susan Castellan brick in memory of Meriann's mother

Bruce Martin brick in memory of Meriann's mother

Rocco Ricci brick in memory of Meriann's mother

Barbara Bednarzik brick in memory of Meriann's mother

Carol Romano brick in memory of Meriann's mother

Karla Pinato brick in memory of Meriann's mother

Amy Paloski in memory of Dunbar Birnie

James Vincent in memory of Dunbar Birnie

John and Carol Roberts in memory of Dunbar Birnie

Lillian Blucher in memory of Dunbar Birnie

Pauline Kovel in memory of Dunbar Birnie

John and Susan Nelson in memory of Dunbar Birnie

Patricia Simrell in memory of Dunbar Birnie

Bert Porter in memory of Dunbar Birnie

Eugenia Somers in memory of Dunbar Birnie

Virginia Thomas brick in memory of Meriann's mother

Ethel Ward 2 garden bricks

Judith Khan in memory of Dunbar Birnie

Barbara Schuyler in memory of Dunbar Birnie

Paula and Pual Rasera in memory of Dunbar Birnie

D.C. Blickenstaff in memory of Dunbar Birnie

Dan Brown in memory of Dunbar Birnie

Jody Imre in memory of Dunbar Birnie

Joyce Barnes in memory of Dunbar Birnie

Channing Memorial Church in memory of Dunbar Birnie

MaryJane Sagan in memory of Dunbar Birnie

Ruth and Jerome Bohse to Sidwell Garden Fund

Ostara Hollyoak in memory of Dunbar Birnie

James and Ruth Bell in memory of Dunbar Birnie

Sharon and Enrique Vasquez in memory of Marty Fagan

Anna Mae Miller in memory of Dunbar Birnie

Claire Kim in memory of Dunbar Birnie

S Wollman in memory of Dunbar Birnie

Rosalie Kirk in memory of Dunbar Birnie

Carolyn Cradler in memory of Dunbar Birnie

Joan and Francis Kelso in memory of Dunbar Birnie

Marcia Thomas in memory of Dunbar Birnie

Dorothy Rockstroh in memory of Dunbar Birnie

Bruce and Nina Martin

David Imre - for water feature in Sidwell Garden

Jody Imre - for water feature in Sidwell Garden

Carol Carlson - for Community Enrichment Giving

### FY2019 DONORS

#### Memoriam Gifts

Dan and Marcia Brown in memory of Saul Wollman

Patricia Simwell in memory of Saul Wollman

Evelyn Grim in memory of Dunbar Birnie

Jerome and Irene Goldstein in memory of Dunbar Birnie

Marilyn Donovan in memory of Saul Wollman

Marcia Thomas in memory of Saul Wollman

Diana Mosley in memory of Dunbar Birnie

Lex Smith in memory of Saul Wollman, and Dunbar Birnie

Joan Lea in memory of John Lea

Evelyn Shulman in memory of Magdalene Fennell, Betty Marvin, and Laura Rohrllich

James and Ruth Bell in memory of Lex Smith

#### Endowment Gifts

Billie Weaver

Carlson Family

### FY2020 DONORS

#### Memoriam Gifts

Evelyn Shulman in memory of Joseph Bishow, Melvin Deatherage, Arlene Shpiegelman, Nancy Mulreany, and Arlene Kutz

Pat Appel in memory of Frank Collins

Claire Lea in memory of John Lea

#### Endowment Gifts

Doceo

Kristie Miller

Kristie Miller

Sara Noon

Ruth Nolan

Bruce Blum

Meriann Ritacco

Karla Pinato

Joan Henry

Patricia Latteri

Barbara Schuyler and Patricia Wilson

Mark Bobotek

Leon Rosenberg

Mary (Penny) Boughn

David Imre

Daniel and Marcia Brown

Joanne LaPorte

Teresa Poyer

Carol Carlson

Susan Castellan

Ernestine Goodman

Carol Romano

Barbara Bednarzik

Bruce Blum

## Legacy Society List

The Columbia Vantage Point Foundation is delighted to recognize the following Vantage Point residents and supporters that are part of the Columbia Vantage Point Foundation Legacy Society established November 2019. In order to be part of the Legacy Society, a one-time gift of \$1,000 or more was given to support the Foundation.

Mr. and Mrs. Dan Brown

Mr. David Imre

Ms. Kristie Miller

Dr. and Mrs. Leon Rosenberg

Ms. Susan Buswell

Ms. Joanne LaPorte

Ms. Ruth Nolan

Ms. Barbara Schuyler  
and Ms. Patricia Wilson

Ms. Carol Carlson

Ms. Claire Lea

Mr. and Mrs. Charles Poyer

Dr. and Mrs. Michael Glasgow

Mr. Bruce Martin

## FY2021 Board of Directors

### **Mark Bobotek**

*President, Corporate Board Member*

### **Victoria Hathaway**

*Vice President, Community Member at Large*

### **Susan Buswell**

*Treasurer, Resident Member*

### **Rosemary Davis**

*Secretary, Community Member at Large*

### **Claire Lea**

*Resident Member*

### **Ruth Nolan**

*Resident Member*

### **Virginia M. Thomas**

*Corporate Board Member,  
President of Corporate Board, MSW, ACSW*

### **James Vincent**

*Resident Member*

*Many thanks to Suzanne Silber, Gerson Kaplan  
and Penny Boughn for participating on the  
Foundation Board in FY2020.*



## CORE VALUES

**Empowered Connection:** We continually seek to provide resources that empower residents to remain connected within Vantage Point, as well as with the greater community.

**Forward Thinking:** We are constantly seeking ways to enhance the quality of residents' lives, allowing for continued independence, personal growth and financial stability.

**Stewardship:** We are responsible and conscientious guardians of our resources and assets for the benefit of the residents and the greater community.