

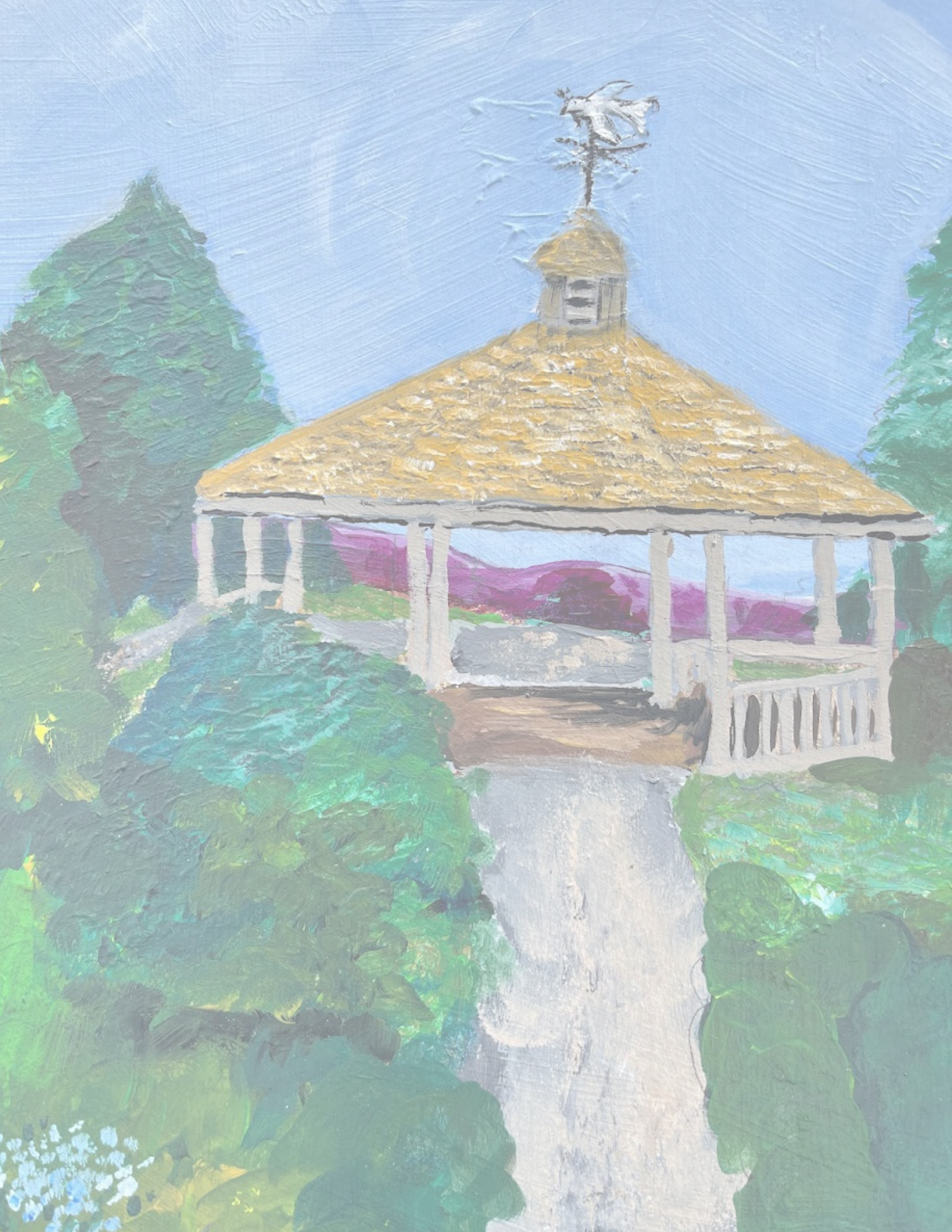


Charitable Giving and Outreach Report 2022



Foxdale Village

A Quaker-Directed Continuing Care Retirement Community



Gratitude from our CEO

It's been said that the greatest asset in a workplace is the team of employees. In serving our residents and one another, each staff person shares their time and talents with us every single day without fail. Unlike many businesses who have had the option to reduce hours or close on certain days, Foxdale Village relies on our team for not only hands and feet that serve every day without fail, but on their ideas and creativity to solve problems together. And, gosh, did we see that happen time and time again throughout the past two years. In that way, our staff are both an asset and a resource.

For that reason, our most recent annual campaign focused on the funds that most directly benefit our staff: The Givers of Care Fund and the Training and Tuition Reimbursement Fund. You will see in the following pages how generously our donor community has responded. We have increased the fund balances because of you and have been able to spend more money to support our staff during these challenging times.

We were also able to enhance the Givers of Care Fund to include not only interest free loans, but grants to be used toward their requests. We couldn't do any of this without support from our donors! You, too, are both an asset and resource to Foxdale Village.

You will see we also raised the balances in many of our other funds, as well. Your support means so much as we partner together to create a giving community in which to live and work.

You continue to inspire us as you honor our community with your gifts. You have our deepest appreciation.



Pamela Carey

Charitable Fund Balances



Fund Name	Gifts Received 7/1/21-6/30/22	Expenditures 7/1/21-6/30/22	Balance as of 6/30/22
Community Fund	\$28,942	\$184,555	\$6,343,846
Entrance Fee Assistance Fund	\$2,200	\$0	\$166,006
Training and Tuition Fund	\$23,369	\$42,842	\$679,844
Givers of Care Fund	\$10,980	\$4,134	\$104,963
Landscape and Garden Fund	\$2,650	\$0	\$389,220
Outreach Fund	\$100	\$0	\$327,994
Undesignated Gifts Fund	\$125,817	\$0	\$443,337
TOTALS	\$194,058	\$231,531	\$8,455,210

One hundred percent of gifts to Foxdale Village’s charitable funds fully benefit the funds. No fundraising expenses are charged against gifts. Funds are invested with Friends Fiduciary Corporation and are accounted for separately.

The official registration and financial information of Foxdale Village may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement. Foxdale Village is a 501(c)3 nonprofit organization — contributions to which are tax deductible to the extent allowed by law.

Overview of Fiscal Year 2022 Giving



Annual Appeal	\$75,919
Centre Gives	\$16,937
In Memory/Honor	\$8,185
Endowments	\$31,302
Bequests	\$51,577
Other	\$10,138
Total	\$194,058

In-Kind Gifts



Foxdale routinely receives in-kind gifts of artwork. While not tied to a specific monetary value, these donations are displayed throughout our community and greatly enrich the lives of residents, family members, visitors and employees.

This past fiscal year, 54 pieces of original artwork were donated to the Foxdale Village permanent collection. Pictured on this page are three paintings donated by the estate of a former resident, Edward Buss. Incidentally, these exquisite works were completed by professional artist, Harry Holder, who is a current Foxdale resident. What a wonderful example of the vibrant, giving community culture at Foxdale Village!



Annual Appeal

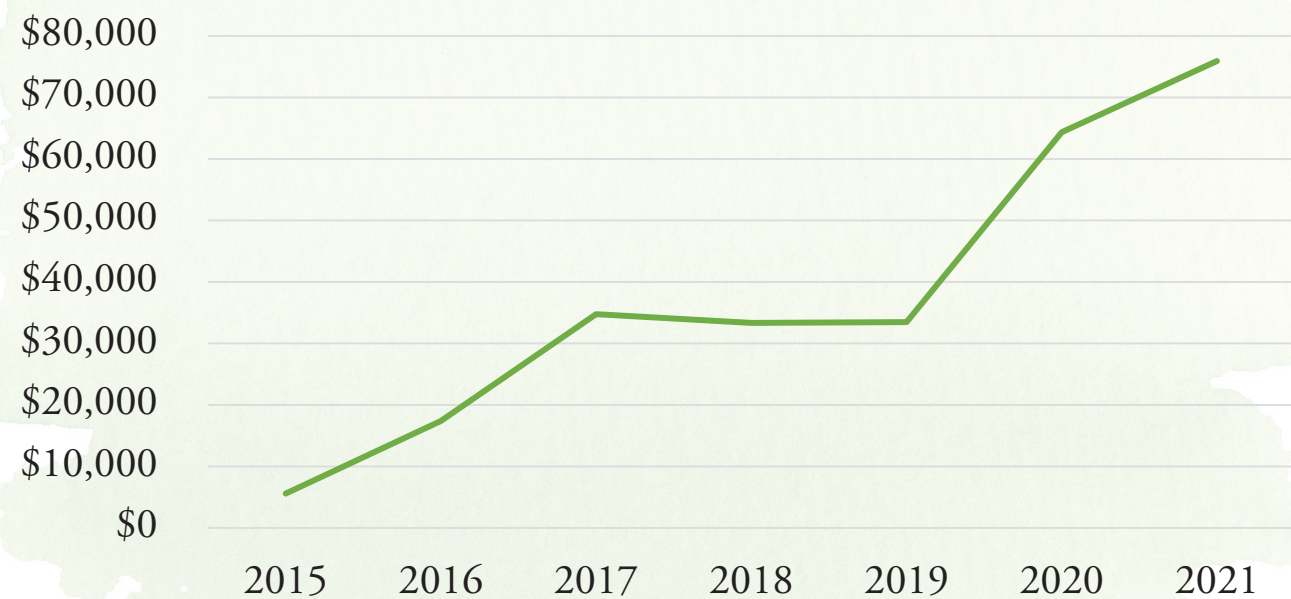
In the fall of 2021, Foxdale Village completed its 7th annual appeal. This is our largest campaign of the year, supporting all of our charitable funds. This year, we specifically highlighted our staff-oriented funds, the Training and Tuition Reimbursement Fund and the Givers of Care Fund.



The results were inspiring. In total, the appeal raised **\$75,919** from 146 donors — both record highs for Foxdale Village. The appeal was backed by 100% participation from Foxdale’s Board of Trustees and Executive Leadership team. Other donors included residents, families, friends, staff, priority list members and various supporters of Foxdale’s mission to serve older adults.

For the second consecutive year, an anonymous donor spurred our campaign with a \$10,000 challenge gift, contingent on us raising at least \$60,000. Our donors responded to the challenge, giving generously and exceeding that goal by nearly \$6,000. Overall, the \$75,919 raised during the 2021 Annual Appeal represented an 18% increase in giving from last year, continuing an encouraging trend of growth for the annual appeal program.

Annual Appeal



Centre Gives

Centre Gives is an annual, 36-hour online giving event hosted by the Centre Foundation. All gifts made during Centre Gives have an expanded impact, thanks to a matching grant stretch pool and prizes. This spring was the fourth consecutive year Foxdale Village participated in this fun, community philanthropy event.

During Centre Gives, 93 unique donors gave a total of \$14,465 to Foxdale Village’s charitable initiatives. Foxdale was also honored to receive the \$500 Creative Video prize. To watch the video, visit the Foxdale Village Facebook page at facebook.com/foxdaler and search videos.

With donations, prizes and stretch funds, Foxdale Village received a total of **\$16,937** during Centre Gives. We are greatly appreciative for those who gave and for the Centre Foundation for organizing this fantastic event.



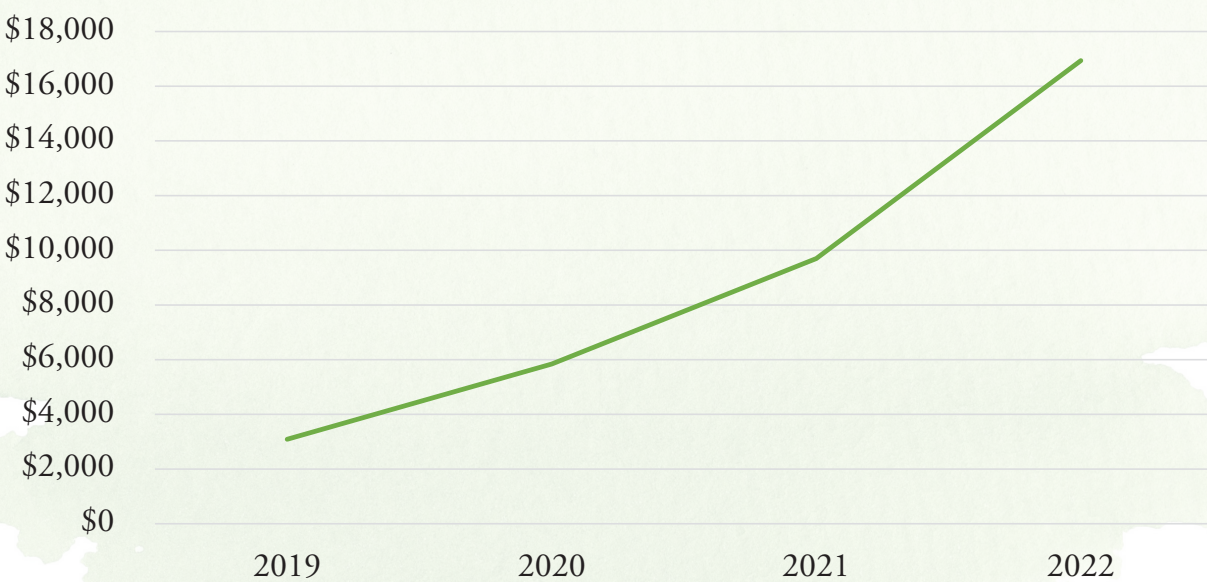
Residents Barbara and John Vandenberg



Licensed Practical Nurse Jen Petsu



Centre Gives



Mission Advancement

Foxdale Village’s seven charitable funds include the Community Fund, Entrance Fee Assistance Fund, Training and Tuition Reimbursement Fund, Givers of Care Fund, Landscape and Garden Fund, Outreach Fund and Undesignated Gifts Fund.

Each of these funds has a unique role in empowering Foxdale Village to serve our residents, staff, families and community to advance our core mission and vision.



Mission

Foxdale Village is a Quaker-directed nonprofit organization that takes a community-based, holistic approach to providing high quality services at a fair cost for the well-being of older people.

Vision

Foxdale Village is a leader in aging services known for its vibrant and innovative approaches to enhancing quality of life in our community.

Undesignated Gifts Fund

The Undesignated Gifts Fund gives our Board of Trustees the most flexibility to use gifts where the need is greatest. At times, this fund has helped Foxdale address unforeseen challenges, like the onset of the Covid-19 pandemic. Covid-19 has brought over \$1,000,000 in additional operational expenses, such as personal protective equipment, physical space alterations and increased cleaning and sanitation. Since 2020, over **\$100,000** has been distributed from the Undesignated Gifts Fund to meet these needs and keep our community safe.

The Undesignated Gifts Fund has also helped Foxdale Village plan for the needs of the future. For example, the fund helped support the construction of our therapy pool, which distinguishes the wellness programming our community provides to residents in independent living, personal care and skilled care.

Among Foxdale Village’s charitable funds, the Undesignated Gifts Fund is the most generously supported. In fiscal year 2022, **\$125,817** was donated to the Undesignated Gifts Fund. We are honored so many donors place the utmost trust in our Board of Trustees to make decisions in the best interest of our community.

Whether looking at challenges of the present or opportunities for the future, Foxdale’s Board of Trustees and administration are committed to using Foxdale’s charitable funds to advance our mission and vision. As with all decisions and actions at Foxdale Village, our charitable funds are deeply rooted in our core organizational values of community, acceptance, inclusion, caring, fulfillment, stewardship and engagement.

Community

Inclusion

Acceptance

Fulfillment

Caring

Stewardship

Engagement



Community Fund

The Community Fund assists residents who find it a challenge to meet their monthly fees at Foxdale Village. As the name would suggest, this fund is closely connected to our core value of *community*. One way we care for each other at Foxdale Village is by ensuring each member of our community can always remain here, even if they outlive their resources or become unable to meet their monthly expenses, through no fault of their own.

During fiscal year 2022, the Community

Fund provided **\$184,555** in monthly fee assistance to 8 Foxdale Village residents. Donations to the fund this year totaled **\$28,942**.



The value of *Community*

Foxdale is a welcoming, relaxed, and open community where all members can feel strongly connected to one another through caring and supportive relationships. We are committed to involvement in and support of our surrounding community.

“I feel so happy about giving to the Community Fund. Nobody knows who receives money from the fund; it is one of those well-kept, quiet secrets. If a Foxdale resident runs out of money, I know they will not be thrown out in the cold. A person can live on at Foxdale the same way they lived before, with the same friends. I feel so fortunate I have given to this fund.”



Resident Helen Roback in her home

Several years ago, 23-year Foxdale resident Helen Roback began a faithful practice of making memorial donations to the Community Fund every time a Foxdale Village resident passed away. During a recent interview, Helen reflected on her gratitude for making this decision.

Support for the Foxdale Village Community Fund extends beyond individual efforts. Some resident groups have established practices to advance the mission of this fund. Foxdale Village’s resident run gift shop sells various items, like hearing aid batteries, sweatshirts, cards and snacks. Each year, the gift shop donates its net proceeds to the Community Fund. Similarly, members of Foxdale Village’s woodshop donate the small fee they receive for completing restoration projects for residents. In fiscal year 2022, donations from these two resident groups to the Community Fund totaled over \$6,000.



Resident Don Snowden in the woodshop



Residents John and Bev Zavodni in the gift shop



The value of *Inclusion*

Foxdale is committed to serving a diverse senior population and employing a diverse staff. We hold ourselves accountable for advancing diversity, equity and inclusion in all of its forms for both residents and staff, thereby enriching our community and its understanding of difference.

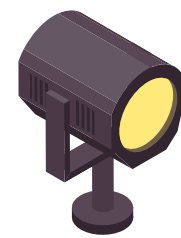
Entrance Fee Assistance Fund

The Entrance Fee Assistance Fund provides financial assistance to new resident applicants who would otherwise qualify to live at Foxdale, but who show through the financial review process that they lack the resources to pay the full entrance fee. Established in 2016, the Entrance Fee Assistance Fund is an integral part of Foxdale Village's efforts to address financial disparities to make our community more diverse and inclusive.

Since its inception, the Entrance Fee Assistance Fund has provided **\$150,000** in support to incoming residents. In fiscal year 2021, donations to the fund totaled **\$2,200**.

The value of *Acceptance*

Foxdale's affirming culture means that people can be themselves, accepted and appreciated for who they are.



Diversity, Equity and Inclusion Committee Spotlight



Collage by Marketing Coordinator Jessica McKeon

Foxdale's DEI committee has engaged in multiple initiatives over the last year to advance Foxdale's values of acceptance and inclusion. The committee has launched a Foxdale Reads program, held a multicultural film festival and hosted several TED Talk series. Each DEI program incorporates reflection and discussion components to foster engagement and generate constructive conversations.

The values of *acceptance* and *inclusion* are also important to the work of Foxdale Village's Diversity, Equity and Inclusion (DEI) committee. This committee is resident-led and includes staff and trustee members. Their work seeks to extend the understanding and awareness of Foxdale residents and staff about different elements of diversity: race, color, national origin, familial status, ancestry, sex, sexual orientation, gender identity, religion, handicap and disability.



Residents and staff gather for a Pride photo



Sabrina Chapman and Marilyn Eastridge

This past June was LGBTQI+ month and a very active time for Foxdale Village and the DEI committee. Foxdale Village was a sponsor of State College's Pride parade and rally. The DEI committee provided community education on what it means to be an effective ally and upstander. Members of the DEI committee, including residents Sabrina Chapman and Marilyn Eastridge, joined administration in attending LeadingAge PA's pre-conference in Hershey on the topic of diversity, equity and inclusion.



Training and Tuition Reimbursement Fund

The Training and Tuition Reimbursement Fund provides funding for educational expenses for employees enrolled in job-related coursework. The fund supports continuing education for staff who are pursuing academic degree studies, certificate programs and training courses. The Training and Tuition Reimbursement Fund is frequently

referenced as a significant benefit of working at Foxdale Village and is a quintessential way we give employees opportunities for development and continued learning. Through the Training and Tuition Reimbursement Fund, Foxdale Village is committed to helping employees grow in *fulfilling* careers.

Last year, 9 staff members received a total of **\$42,842** in support from the Training and Tuition Reimbursement Fund. Donations to the fund in fiscal year 2022 totaled **\$23,369**.



The value of *Fulfillment*

The fulfillment and wellbeing of our residents and employees are of essential importance. Foxdale enables residents to lead fulfilling, healthy and active lives through a variety of activities, services and proactive wellness programs. We are committed to the satisfaction, success and development of our staff and provide the opportunities and tools through which they can continually learn and grow.



Employee Spotlight

Brandon Packard started his career with Foxdale Village as a dining associate and dishwasher in 2008. A few years later he received cross-training to serve as a dietary aide and cook. Through this experience, Brandon knew his long-term passion was in aging services. In 2014, with the support of the Training and Tuition Reimbursement Fund, Brandon enrolled at Penn State University Park to obtain a bachelor's degree in Hospitality Management.

While working full-time at Foxdale and pursuing his degree part-time at Penn State, Brandon reflects on this season as one of exceptional personal growth. The opportunities to apply what he was learning in the classroom and to bring experiential knowledge back to his classmates was rewarding.

In 2018, Brandon graduated with his bachelor's degree and stepped into a leadership role in Foxdale Village's Dining Services department as the hospitality manager. After a brief year away from Foxdale Village to gain additional experience, Brandon returned in April 2022 as a residency planning counselor.

In his position, Brandon serves as a primary source of information for prospective residents for independent living. His position also includes an outreach emphasis, as he represents Foxdale Village at various local community functions and serves as a Foxdale ambassador to the public. Through his new role, Brandon utilizes an effective mix of hospitality, administrative, marketing and communication skills he gained at Penn State.





Givers of Care Fund

Foxdale Village is known for its *caring* approach to serving older adults, whether they live in a cottage, apartment or health center residence. We are equally committed to caring for Foxdale Village's employees. The Givers of Care Fund fulfills this value by providing financial support to employees facing unanticipated emergencies.

In the last year, staff leadership and the Board of Trustees discussed ways to expand the scope of the Givers of Care Fund to bring greater benefit to Foxdale Village employees. Based on these conversations, the Board of Trustees adapted the eligibility requirements for our no-interest loan program to increase access. The board also created a new grant program to support staff in emergency situations with financial assistance grants that have no expectation of repayment.



The value of *Caring*

Foxdale is committed to caring for and caring about people. Excellent healthcare, warm and inviting facilities, respect for privacy and the recognition that getting the details of everyday life right matter a great deal. The residents, staff and board recognize the value of each person, trust one another and treat each other with dignity and respect.



Donations to the Givers of Care Fund generated the opportunity for the Board of Trustees to make changes to the Givers of Care Fund programs. In the last year, one staff member received a grant totaling **\$500** and six staff members received no interest loans totaling **\$3,634**. Donations to the fund in fiscal year 2022 totaled **\$10,980**.

We are excited that the recently approved changes will lead to greater care for Foxdale Village's employees. The Givers of Care Fund has been used over time to assist employees with emergent needs such as car and home repairs, child care tuition and rent payments.

While distributions from the Givers of Care Fund are kept confidential to respect privacy, recipients frequently express their appreciation to the small team who manages the fund. One staff member who received a Givers of Care Fund loan explained their experience this way:

“When a family is faced with a life altering event, much like I was, it is comforting to know there is a place that will help. I lost a family member who was the main financial provider for myself and my family. All of a sudden, I had urgent utility and rent bills due. What a blessing Foxdale was for me. I was able to utilize the Givers of Care Fund for my rent, which took a huge burden off my back. I was able to focus on my child, my work and get back to life.”



Friends Fiduciary

Foxdale Village’s Board of Trustees oversees the effective financial *stewardship* of our organization. This past year, the board made changes to ensure our investments, including Foxdale Village’s seven restricted charitable funds, were optimally aligned with our values. Our investments are now held with Friends Fiduciary, who unite our investment strategies with Friends’ views on peace and social justice. They act in three primary ways to ensure our values guide our investment activity:



1. Actively screen companies for social responsibility
2. Vote shareholder proxies to communicate our values on financial, social, environmental and governance issues
3. Join other institutional and faith-based investors in shareholder resolutions and company dialogues to encourage reform

Foxdale Village’s transition to Friends Fiduciary has brought added assurance that our investment strategies reflect integrity as we pursue strong returns with social responsibility.

The value of *Stewardship*



Foxdale is committed to the effective stewardship of our people, planet and finances. Responsible human resource practices include providing a good work environment and fair compensation. Environmental responsibility involves operating in a sustainable and ultimately regenerative fashion. Financial stewardship means operating both effectively and efficiently; integrity, fairness, and fiscal soundness are integral to our financial decisions and processes.



Landscape and Garden Fund

The Landscape and Garden Fund exemplifies Foxdale Village’s value of *stewardship* by supporting special outdoor projects that enhance our campus and benefit the environment. This year marked the exciting conclusion of construction on a bird garden connecting Foxdale Village to nearby Tussey View Park. The bird garden project was funded through an exceptionally generous, **\$550,000** donation from Charles “Skip” Smith.

The bird garden was designed to be both beautiful and functional. The beauty of the landscape is apparent as you stroll the path; the functionality in the design has been accomplished through the use of a wide variety of native trees, shrubs and



Resident Charles “Skip” Smith

perennials, in addition to a carefully constructed natural boulder retaining wall and bird bath. These elements have been combined to develop a habitat that will attract birds and pollinators, supporting our ecosystem while providing a location for visitors to enjoy nature’s peace and tranquility. The garden’s trees and shrubs provide birds with a potential source of food and shelter. The retaining wall, constructed from limestone boulders salvaged from local construction projects, draws pollinators such as solitary bees. The natural stone bird bath at the garden’s center provides the necessary water.



A robin enjoys the garden’s stone bird bath

The garden uses *Plant Community Design* principles to blend ecology with aesthetics that mimic wild landscapes. Lawn is limited to a strip along the public sidewalk. Instead, a carpet of herbaceous perennials is displayed in the center circle. In addition to bringing biodiversity, dense layers of plantings absorb stormwater and sequester more carbon than mowed lawn.

The Foxdale Village bird garden is open to both Foxdalers and local community members alike. We are grateful this space will support so many people and our environment.





Outreach Fund

Foxdale Village's value of *engagement* underscores our belief that being part of a community is more than living or working somewhere. Engagement means dialoguing, serving and taking action to make your community a better place. This principal shapes how we operate at Foxdale Village and also influences how we engage with our local area. As our first discussed value of community states: *We are committed to involvement in and support of our surrounding community.*

Foxdale Village's Outreach Fund is designated for providing seed money to support exploration and evaluation of promising mission-based opportunities in our local area. While we are analyzing the best ways to use this fund, we continue to invest in our local community through other initiatives in our operational budget.

The value of *Engagement*

Residents and staff have input into decisions that impact them. Differences are expected; what matters is that all voices are respectfully heard.

Community Outreach



Accounts Payable Coordinator Sam Snyder at Day of Caring

Foxdale Village gives back to the greater Centre region community through financial and in-kind donations supporting non-profit and other organizations that have a positive impact on older adults. These include Alpha Fire Company, Interfaith Human Services, Centre Lifelink, Meals on Wheels, Mid-State Literacy Council and Centre Foundation.

Residents and staff also provide volunteer service to many local organizations including Ten Thousand Villages, AAUW, American Red Cross, State College Food Bank, and more. As an organization our active memberships include Adult Children of Aging Parents (ACAP), Geriatric Interest Network, Centre County Council of Human Services and the Chamber of Business & Industry of Centre County.

Staff enjoy participating in projects such as the United Way Day of Caring, the holiday angel tree, annual food drive and collecting toys for Toys for Tots.



STATE COLLEGE AREA MEALS ON WHEELS

"Delivering meals to the homebound since 1971"



Centre County United Way

Thank you to our donors

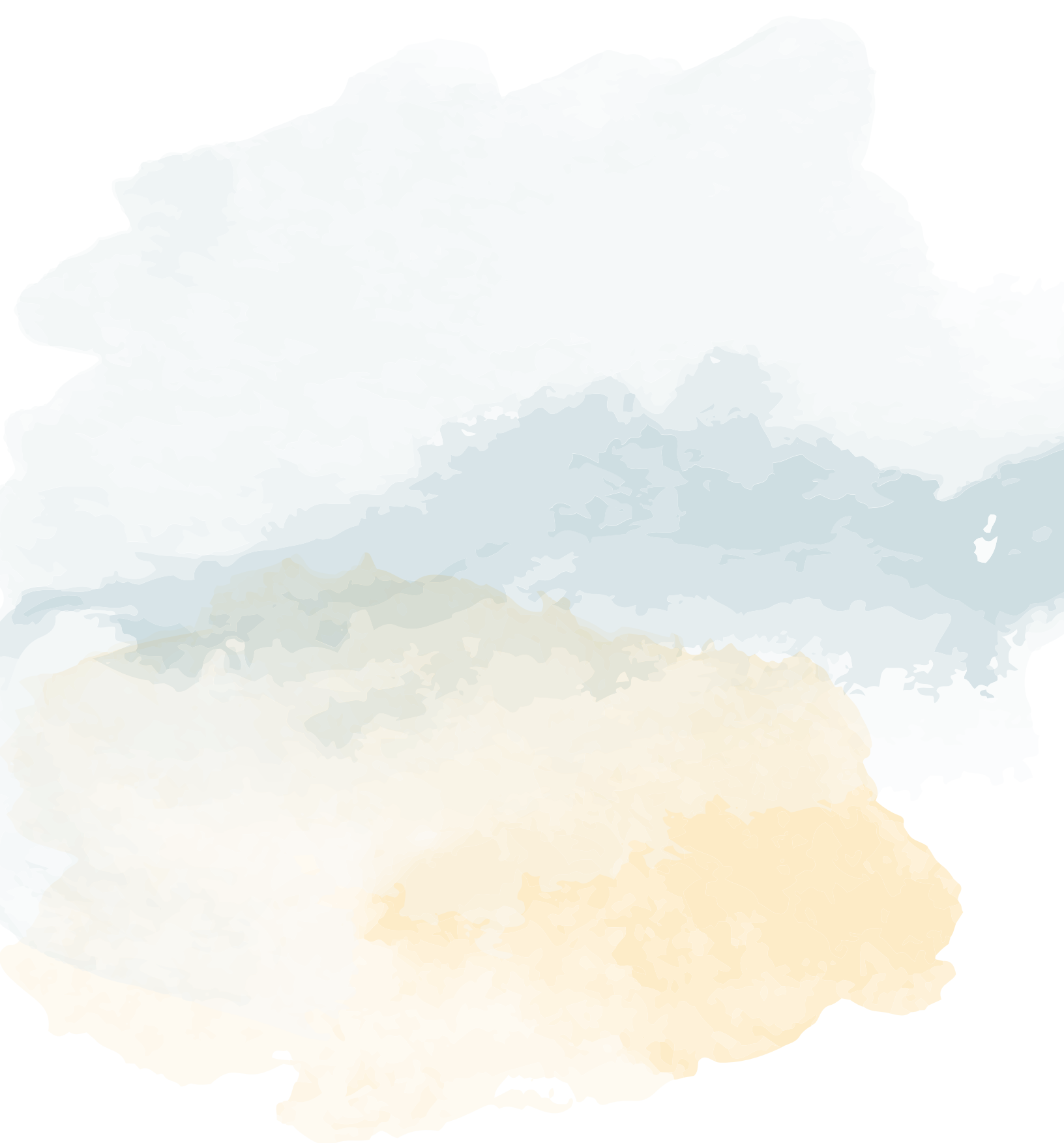
Anonymous (3)
Lydia and Gary Abdullah
Steven Aberg
Carter and Ruby Ackerman
Dianna Allison
Kathlyn Allison
Carolyn Anderson
Lorna Arocena
Nate and Kristen Ashton
Ann Austin
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Eric and Lisa Barteldes
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Tammy Weaver
Meredith Weber
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Wendy West
Jerry and Jane Wettstone
Connie and Steve Wheeler
Ronald White
Grace Wood
Dixie Woodard
Foxdale Village Woodshop
Janet Wuest
Peter Wynne



Foxdale Village is open to all regardless of race, color, national origin, familial status, ancestry, sex, sexual orientation, gender identity, religion, handicap, or disability.

500 East Marylyn Avenue | State College, Pennsylvania 16801 | (814) 238-3322

(800) 253-4951 | development@foxdalevillage.org | www.foxdalevillage.org

