



Foxdale Village

A Life Plan Community Guided by Quaker Values



2023-24

Annual Impact Report



Mission. Foxdale Village is a not-for-profit Life Plan Community guided by Quaker values 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.



A message from our CEO

When I was very young, I learned a lot about generosity from both of my parents. As generous donors, you likely learned some of these lessons, too.

Generosity is not only about giving money to others. I remember my mom giving a cousin a 25-pound sack of flour so she could make and sell bread to others to feed her family of seven. There was never a question that we would share, even though we weren't sure we had enough to feed our own family.

My dad exemplified giving from the heart. If someone came into his diner without money, he would offer them the most expensive meal of the day, no questions asked, no pressure to repay. I learned to give from the best you have, not the least.



Giving generously has absolutely nothing to do with how much we have but how much our hearts are willing to share with others. My parents gave selflessly, knowing they were likely never to be repaid. While we had very little to give, they always gave to others. And I mean always.

Giving is also most definitely about sharing financial resources. Although donors give to Foxdale Village all year long, once each year, we ask you to partner with our community to invest in the lives of others — our residents, staff and sometimes, those in the greater State College area. Our seven charitable funds provide dignity and peace of mind for others, offer opportunities for a better future and support community groups providing services for others that we are unable to fulfill.

As you use this calendar over the coming year, you will have a chance to understand more about the ways we steward the resources you and others have shared with Foxdale in 2023. Know that every single dollar is committed to being used in the way you have designated. In addition, our board members and staff would never ask you to donate if we had not done so ourselves.

Thank you for answering our call. Thank you for sharing your best. Thank you for believing, as we do, that the world is far better when we work together.

Tama Carey



Community Fund. This fund assists residents, who through no fault of their own, find it a challenge to meet their monthly fees.





Value of Caring. Foxdale is committed to caring for and caring about people. Excellent health care, warm and inviting facilities, respect for privacy, and the recognition that getting the details of everyday life right matters 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.





Landscape and Garden Fund. This fund provides funding for landscape and gardening projects on the Foxdale campus.





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.





Givers of Care Fund. This fund provides grants and short-term, no-interest loans to staff for unanticipated emergency needs.





Value of Acceptance. Foxdale's affirming culture means that people can be themselves, accepted and appreciated for who they are. **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 its forms for both residents and staff, thereby enriching our community and its understanding of difference.





Outreach Fund. Provides seed money to support promising mission-based opportunities in the local area as well as a way for Foxdale to support projects which may benefit local area seniors.





Training and Tuition Reimbursement Fund. This fund supports continuing education for Foxdale staff and provides partial funding for educational expenses related to coursework such as academic degree programs, certificate programs, and training courses.





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. **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.





Undesignated Gifts Fund. This fund holds gifts made to Foxdale Village that are not directed to a specific fund or for a specific purpose and allows the Foxdale Board of Trustees to apply the funds where the need is greatest.





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.





Entrance Fee Assistance Fund. Provides entrance fee assistance to those who would otherwise qualify to live at Foxdale Village, but who show through the financial review process that they lack the resources to pay the full entrance fees.



A message from our CFO

Those connected to Foxdale Village have a rich tradition of sharing their gifts and talents with others. When donors choose to support Foxdale Village, they have the option to designate their contribution to a specific fund or to the undesignated fund, allowing the board to use these donations where the need is greatest. The strong financial foundation built by the thoughtful donors of the past has been instrumental in sustaining and growing this community. Their foresight and philanthropy have ensured that Foxdale Village can continue to thrive and support its residents in meaningful ways.

I am honored to interact with donors to Foxdale Village and deeply appreciate their thoughtfulness and generosity. My heart is touched each time I witness a recipient benefiting from these funds. They are truly humble and grateful for the support they receive. I am proud to be part of an organization that embodies the values of mutual care and community support.

With gratitude,

Ally Shughart



Overview of Fiscal Year 2024 Giving

Annual Appeal	\$89,128
In Memory/Honor	\$18,410
Endowments	\$21,109
Bequests	\$5,213
Other	\$38,885
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Total	\$172,745



Charitable Fund Balances

Fund Name	Gifts Received 7/1/23 - 6/30/24	Expenditures 7/1/23 - 6/30/24	Balance as of 6/30/24
Community Fund	\$83,619	\$419,249	\$5,325,455
Training and Tuition Fund	\$24,438	\$54,986	\$770,263
Givers of Care Fund	\$2,990	\$4,142	\$115,468
Landscape and Garden Fund	\$8,224	\$0	\$23,738
Outreach Fund	\$100	\$0	\$390,221
Entrance Fee Assistance Fund	\$25	\$0	\$171,434
Undesignated Gifts Fund	\$53,349	\$0	\$598,384
Total	\$172,745	\$478,377	\$7,394,963

One hundred percent of gifts to Foxdale Village's charitable funds fully benefit the funds. No fundraising expenses are charged against the gifts. Funds are invested with Friends Fiduciary 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.

Thank you to our donors

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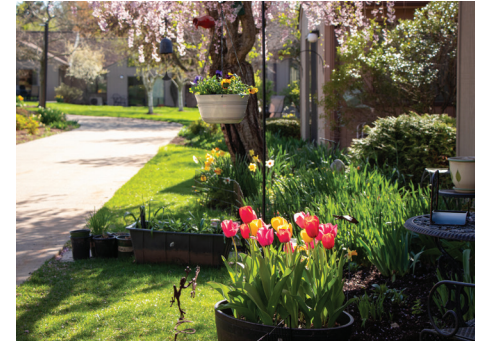


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Foxdale Village is open to all regardless of race, color, national origin, familial status, ancestry, sex, sexual orientation, gender identity, religion, handicap, or disability.

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