

Charlestown Philanthropy

2022 Year in Review



Charlestown
BY ERICKSON SENIOR LIVING SM

A Note from the Director:



Dear Valued Donors,

2022 was yet again an interesting and challenging year. In 2020 we learned to “pivot” our fundraising strategies. In 2021 and 2022 this continued with fundraising in a virtual world. The results in 2022 were nothing short of amazing. Once again, our community came through and truly embodied the mission of “sharing our gifts to celebrate life.” The need for funds does not diminish, even during a worldwide pandemic. We were still able to offer scholarships to our students pursuing continued education, provide peace of mind and a “home for life” to those who had outlived their financial resources through no fault of their own, and provided a beautiful holiday bonus to our hard working hourly staff. All of this was with the unwavering support of YOU - our residents!

*Whether you supported our efforts in 2022 or will consider doing so in 2023, every dollar truly helps! If you moved in during the past year **Welcome to Charlestown!** We look forward to getting to know you (and hopefully seeing you at our **Annual Gala** in September!)*

Friends & Family are extremely important to the future of Charlestown Philanthropy so please share the link to this report with them. In order to save some trees, we are providing this report online this year.

Thank you so much for your support of our efforts. It’s truly appreciated (and needed).

Stay safe and well. Here’s to a great 2023!

Warm regards,

A handwritten signature in black ink, which appears to read "Patti Santoni".

Patti Santoni

Director of Philanthropy

Patti.Santoni@Erickson.com

410-737-8832



2022 Philanthropy Annual Review

I. Benevolent Care Totals/ Legacy Gifts

II. 29th Annual Tin Cup

III. 3rd Annual Telethon: Great American Road Trip

IV. Cars for Care

V. Resident Fundraising/ Treat of the Quarter/AmazonSmile

VI. Scholars

VII. Staff Appreciation Fund

VIII. Treasure Sale

VIII. Give Smarter in 2023/ Chapel Concert Campaign

X. Gala 2023 - Save the Date!

XI. Secret Admirer & Plans for 2023

BENEVOLENT CARE

What is the Benevolent Care Foundation? Established in 2001, the Benevolent Care Foundation’s purpose is to help to provide Charlestown residents with financial support so they will have a home for life. The concept of a home for life is very important. People thrive when they feel supported by family, friends and community.

As Chairperson, I work with a committee of dedicated people and the Philanthropy team led by Patti Santoni, who work endlessly to find new and creative ways to raise the necessary money for our residents in need.

In the twenty plus years the Foundation has existed it has been able to financially support and sustain a home for life for residents in need and by contributing to help sustain the Fund. In just 2022 the Foundation was able to transfer \$800,000 into the Fund. With the ever-rising cost of care the work of the Foundation is more important than ever.

Thank you to all of you who provide your time, talents and donations (including planned gifts). These much needed and appreciated acts sustain our twenty two year old tradition!

Laura Ostroff
Chair, Benevolent Care Foundation

The Resident Council’s **Benevolent Care Fund Committee** works with the Philanthropy department to raise awareness of the need and the ways residents can help to ensure that everyone has a “Home for Life”.

As you will discover in this report there are so many ways that you can get involved. Many of the clubs, craft groups, and individuals donate their time and talents to support Benevolent Care. Additionally, we are thankful for the financial support of Charlestown residents and their families, the staff and the Board of Directors.

As we enter our 40th year there will be new events and an emphasis on the future. The dollar donated today may help you or a friend tomorrow. I look forward to working with you to support this essential work.

With gratitude,
Carol Kefford
Chair, Benevolent Care Fund Committee

BCF 2022 FUNDRAISING TOTALS (net proceeds):

\$1,122,582 in 2022 compared to \$700,000 in 2021!

Here's who helped us get to record breaking numbers:

Realized Planned Gifts - \$422,627

Residents - **\$261,612**

Cars for Care - **\$16,425** - 13 cars

Resident Clubs - **\$15,146**

Employees - **\$17,544**

Board of Directors - **\$30,100**

Vendors - **\$67,025**

Tribute Gifts - **\$26,488**

Treasure Sales (& stores) - **\$136,000 (80% of proceeds benefit BCF)**

Grants/Foundations - **\$107, 825** (Jim Davis/PNC/Giant)

Appliance Sales - **\$3,050**— 22 items

Miscellaneous - **\$18,740**

BCF EXPENSES:

In 2022 - 24 residents lived better lives through the generosity of donors to Benevolent Care at a cost of \$1.7 million. Since 2013, residents have lived an average of 17.8 years at Charlestown before requiring BCF funding.

PLANNED GIFTS/LEGACY DONORS:

In 2022 we received commitments for NEW planned gifts totaling **\$125,000**. We received a total of **\$422,627** in BCF realized planned gifts.

MEMORIAL BRICKS:

Memorial bricks placed in our Memory Walk on campus can be purchased for \$200 and are a thoughtful way to pay tribute to your friends and loved ones who have been Charlestown residents. In 2022 we had **20** memorial bricks donated to honor those we have lost. A new sign was installed in 2022 to help families locate the



TIN CUP 2022

Vendors, residents and employees were excited to hit the greens to help us raise **\$24,444** for Benevolent Care during the *29th Annual Tin Cup Golf Tournament*.

The Pinnacle Glass foursome of Steve Buschman, Matt Butler, Jeff Kern and Adam Stasuk won the tournament and our lucky 50/50 winner was Guy Allen! Our Tin Cup wouldn't be as successful without the support and enthusiasm of our Underwriters: Considine Contracting Group, MacKenzie Contracting, Krick Plumping & Heating, Pinnacle Glass, R.P. Hacker Painting and Society of St. Sulpice Province of the United States.

This year with because our 40th Anniversary efforts, we will not be hosting the Annual Tin Cup Golf Open.

Stay tuned for a date for the 2024 event.



3rd Annual Telethon for Benevolent Care



With the overwhelming positive response from our telethons in 2020 and 2021, we decided to pack our bags once again and hit the road for another adventure during our 2022

Great American Road Trip Telethon!

The opportunity to take viewers on a virtual trip to destinations across the USA to share sights, fun facts as well as some food and drinks was too good to pass up! In three hours time we explored many US destinations, showcased incredible talent, highlighted thankful families that have benefited from our Benevolent Care Fund, shared delectable recipes from our travels, and presented a fabulous selection of raffle prizes.

Our telethon had two objectives: 1) Raise much needed funds for our Benevolent Care Fund and 2) Entertain (and educate) our viewers.

Prior to the event we had secured several vendor sponsorships as well as 100% support from our Board of Directors to create a matching gift.

The final net total raised from this event was..... **\$116,488!**

SAVE THE DATE!

We look forward to **Friday, September 22nd** for our ***Ruby Anniversary Gala.***

More details as we get closer to that date.





Cars for Care

Car Donation Program Benefitting Charlestown's Benevolent Care Fund

Our ***Cars for Care*** program offers an easy way for our residents and their family members to donate a vehicle that they no longer want or need.

The donation of your vehicle allows you to save money on insurance, registration, parking and maintenance of a vehicle that may not even be used. Not to mention that a sitting vehicle is susceptible to additional problems. Your vehicle donation makes a difference for our Benevolent Care Fund, gives you a tax deduction and one less thing to have to think about.

In 2022, thirteen residents and family donated their used vehicles to our ***Cars for Care*** program. The donation of these vehicles resulted in a 2022 total donation of **\$16,425** to our Benevolent Care Fund.

So, ***If You Are Done With It...Do Good With It.*** Help us make a difference with the donation of your vehicle in 2023!

Donate your vehicle (running or not!) to the Charlestown Cars for Care Program..

**Don't park it
Donate it.**



For More Information Contact Philanthropy

THANK YOU RESIDENT CLUBS!

We would like to thank & acknowledge the following clubs and groups for their donations to BCF in 2022:

Charlestown Quillers **\$558**
Charlestown Quilt and Fiber Artists **\$3,573**
Charlestown Little Theatre Company **\$500**
Charlestown Stained Glass **\$500**
Charlestown Woodshop **\$100**
Floral Reflections **\$2,606**
Knights of Columbus OLOA Council 13069 **\$1,250**
OLOA Knights of Columbus Auxiliary 13069 **\$500**
Recycling Club **\$769**
Residents' Council **\$500**
Second Hand Rose **\$2,749**
Sew 'n' Sews **\$1,041**
VFW Post 219 **\$500**



Treat of the Quarter

This year we provided quarterly "Treats" to more than 300 participants. This includes a combination of resident and employee donors who contributed at least \$25 per month or a one time donation of \$300 or more to the Benevolent Care Fund.

amazonsmile
You shop. Amazon gives.

In total, Charlestown Benevolent Care received **\$1,422** in AmazonSmile donations since the program started in 2019.

Amazon has discontinued the program . Thank you to those that were AmazonSmile customers!

SCHOLARS PROGRAM

In 2023 we are celebrating the 35th Anniversary of the Charlestown Scholars' Program, which at present includes 100 active scholars. Over the years residents, groups, and others have donated more than \$4 million dollars to encourage and support our student-employees to continue their education beyond high school. These donations come from individuals, sponsored Named Scholarships as well as planned gifts through resident estate plans.

In 2022, **\$212,881** was raised through the generosity of residents' donations, group giving, and a \$5,000 donation from the Jim Davis Family Foundation. In addition, we added the Don Brodeur Joy of Learning \$500 technology grant to new scholar students, three Named Awards from the Charlestown Retired Nurses group for Health Sciences, and two new AITP STEM Named Scholarships.

We are consistently in awe of the generous giving of our residents and groups to this important program in support of our Scholars. Thank you, thank you, thank you to each of you who help to fund this program every year and help to make this remarkable program successful. Here's to 2023!

Sincerely,

Charlie Eichenlaub

Scholar Committee Chair

2022 Scholars Committee

Charlie Eichenlaub (Chair), Ed DeLong, Norma Goldberg, Jackie Graham, Roland Gray, Eugenia High, Mel Milio, Mimi O'Donnell, and Marie Skane, Elva Tilman

2022 Scholar Class



STAFF APPRECIATION CAMPAIGN

Dear Neighbors,

Together, Charlestown residents surpassed all previous records for money given during the 2022 the Staff Appreciation Fund Campaign. All residents appreciate the fabulous, hardworking, reliable staff who give their time and talents to make our home **exceptional!**

We have a dedicated committee and tremendous support from the Philanthropy office.

Resident generosity this year was more than heartwarming! When the committee personally thanked the staff, we were overwhelmed with humility and excitement shown by the staff for the appreciation gifts given in the holiday season.

From the bottom of my heart, I thank all of you in the Charlestown family for your tangible demonstration of our appreciation for the staff.

With gratitude,

With gratitude,
Mimi O'Donnell
2022 Staff Appreciation Chair



2022 Staff Appreciation Committee

Mimi O'Donnell (Chair), Merci Izquierdo– Whitaker, Carol Jones, Pat Kasuda, Lois Kimber, Cindy McManus, Frank Moran, Elaine Mumford, Beth Schilpp, Mary Lee Seaman, Dawn Strumsky, and Rosemary Taylor

Number of Staff	Campaign Total	Percentage of Households
820	\$320,000 (\$275k in 2021)	74%



TREASURE SALE

2022 began with having to cancel our February sale, however we were able to host 3 large sales this year in addition to having our stores open on Tuesdays each week. Our volunteers joined together and became more committed than ever to have a successful year!

How did we do?

Treasure Sale & Stores - Annual Gross Proceeds: \$171,536 (\$51,289.52 - 2021)	
Treasure Sale Events	\$103,837.05
Treasures Unlimited	\$ 23,537.50
Treasure Chest	\$ 16,990.00
Ladies' Boutique	\$ 25,767.00
Between Sales	<u>\$ 1,404.70</u>
Gross Sales	\$171,526.25

Consignment: **\$1,959***

**All proceeds directly benefitted Benevolent Care*

Treasure Sale Gifts — each year our volunteers vote to determine how Treasure Sale proceeds will be distributed among other Funds and resident clubs.

- Benevolent Care (80%) - \$129,387.64*
- Scholars (2%) - \$3,234
- Chapel Concert (1.5%) - \$2,570
- Staff Appreciation Fund (2%) - \$3,234
- Ruth H. Houck Library (2%) - \$1,025.79
- Film Library (2%) - \$3,234
- Harmonizers - \$1,200

An additional \$6,613.36 was transferred to BCF, bringing the total distribution for 2022 to \$136,000!



Be sure to LIKE our Facebook page for the latest inventory and information on virtual sales.:
Charlestown Treasure Sale



GIVE SMARTER IN 2023:

The stock market has created immense wealth for millions of households. Appreciated stock represents the best tax-advantaged way to support the causes you care about for 3 key reasons:

1. Donors avoid capital gains tax liability - no tax is due on gains on stock held more than 1 year.
2. Donors deduct the full value of the stock on tax returns.
3. Nonprofits receive larger pre-tax gifts.



Donating stock (vs. cash) saves you money - lots of it. You avoid capital gains tax while earning a bigger pre-tax deduction. In many cases the net tax benefits are greater than your original investment. Nonprofits also receive a larger payout as they get to keep the proceeds that would otherwise go to the government.

Appreciated stock is simply a better vehicle for supporting the causes you care about. Charlestown Philanthropy is pleased to offer an easy way to donate your stock online. Please visit:

<https://donatestock.com/charlestown-community-inc>

Chapel Concert Series



The Chapel Concert Series was established in 1989 by Virginia D. Moore, one of the early residents of Charlestown. Her personal standard was a musician or musical group who, if they were qualified to perform at the Meyerhoff, they were sought for the Chapel Concerts.

This glorious tradition has been going strong for 34 years because of residents like you, who contribute funds to insure highly talented musicians now perform at least twelve concerts each season. A carefully planned series includes solo artists and ensembles who sing, play the piano, organ, violin, or balalaika with classical and popular selections. Concerts are typically held on Sunday afternoons at 3pm in the Our Lady of the Angels Chapel.

An annual fund raising campaign to support the Chapel Concert Series occurs during July. Contributions in 2022 were more than **\$20,000** and are used to sponsor the artists who entertain us each season. The generosity of residents is remarkable and most appreciated!

Please consider joining the Chapel Concerts committee to help plan and share beautiful music. For more information, call Anna Marie Ciarrocchi, 443/833-3791, Paula Ray, 443/833-3785 or Rosemary Eck, 410/314-1783. Your enthusiasm is welcome!

SAVE ♦ THE ♦ DATE
CHARLESTOWN'S
RUBY ANNIVERSARY
GALA

*"Paint the
Town
Red"*



Friday, September 22, 2023
6:30 p.m. to 10:30 p.m.
John Erickson Conference Center

Proceeds benefit Charlestown Benevolent Care Fund

ARE YOU A “SECRET ADMIRER”??

Every year, the Philanthropy Department receives bequests from compassionate residents who, unbeknownst to us, have provided Charlestown with a planned gift. Bequests through a will or a trust (or other planned gifts, such as benefits from a life insurance policy, retirement plan or entrance deposit), are, as you can imagine, *critical* sources of support for the Benevolent Care Fund here at Charlestown. *Did you know you can designate a portion or all of your Entrance Deposit to Benevolent Care?*

These “secret admirers,” help Charlestown keep the promise of a “Home for Life” to you and your neighbors.

If you have made plans to leave a legacy for Charlestown through a planned gift (bequest, entrance deposit, Charitable Gift Annuity), we encourage you to share that information with us, with full confidentiality, so that we can thank you now for helping to provide a “Home for Life” for your neighbors for many years to come. You will be joining a select group of **Legacy Society** members that are at the very heart of our mission to “share our gifts to create a community that celebrates life!” (*Gifts of \$5,000+ include a special **ruby red** engraved leaf on the Legacy Tree in 2023*).

For more information on how you can become a Legacy Society Donor, or to let us know that you have already included Charlestown in your estate plans, please contact Philanthropy.



40 Years of Charlestown and FUN in Fundraising!

There is much planned for the 40th Anniversary of Charlestown in 2023. We are looking forward to the return of our **Annual Gala** on Friday, September 22nd

Don’t miss our **Scholars Ceremony** on May 17th in the Conference Center and join us for our quarterly Treasure Sales!

We are encouraging all residents to share the links below to donate with **Friends & Family**.

In order to continue to grow the Benevolent Care Fund it’s critical we get the support of not only Charlestown residents but our Charlestown families as well.

Share this link & QR code with
Family & Friends:

[Elm.convio.net/charlestownBCF](https://elm.convio.net/charlestownBCF)



Open phone camera
and scan code above

THANK YOU!!



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