



**BENTLEY
VILLAGE
FOUNDATION**

2024 COMMITTEE REPORTS

2024 FINANCE COMMITTEE

MAJOR ACTIVITIES

Revamping Existing Investment Policy: The policy was updated and approved by the Board of Trustees.

Preparing the 990-tax return: The 2023 990 tax return was prepared by the committee and reviewed by the CPA firm of Mauldin & Jenkins. We propose to the Board of Trustees that we have them do a full financial audit (cost of \$ 12,000) and the preparation of the 2024- 990 (cost of \$ 2,000). This will significantly reduce the work of the Treasurer and GPS, our accounting firm.

Improving Document retention: Important paper documents, including those required by the IRS, have been stored in outside facilities and digitally in the cloud. They have been categorized so that they can easily be retrieved when necessary.

Preparing Budgets. GPS prepared the 2024 budget and greatly reduced the work by installing the information in our QuickBooks Online accounting system. This made it much easier for management to review the budget on time.

Financial forecasting. The Treasurer has been heavily involved in preparing these critical forecasts. In 2025, GPS and a member of our committee will take over. With the success in mechanizing the budget it is hoped that the same can be done with the financial forecasts.

Chuck Brooke

Treasurer

December 12, 2024

2024 DEVELOPMENT COMMITTEE

2024 was an outstanding year for the Development Committee. Revenues reached a new high and an overall increase in people donating to Bentley Village Foundation.

The Dollars for Scholars Golf Tournament, chaired by Denise and Jim Greer, set a record in funds toward our Scholarships Mission. The \$170,000+ is a great foundation for the scholarships to be awarded this year.

The Boots and Bling fundraiser for the Programs side of our mission gave us a much-needed boost in the recognition of the Bentley residents to the great programs sponsored by the Foundation as a result of this increased awareness, residents are giving more of their sponsorship money to help pay for entertainment produced by the Programs Committee.

Diane Halas, who has been with the programs group since the Foundation was started, is retiring this year. Thank you, Diane, for your years of service and for finding a qualified replacement in Barbara Nielsen.

Donors have started to make decisions to give donations to both programs and scholarships. The increase in donations is the result of the effort to make sure the residents know that these programs are funded by Bentley Village Foundation.

Rich Nortz, Chairman

February 15, 2025

2024 SCHOLARSHIP COMMITTEE

In 2024, we received nine new applications for scholarships. Two were Bentley Village employees and seven from dependents of employees. We awarded new scholarships to one employee and all seven dependents. (The “Bentley Wings” Competitive Scholarships are awarded to 50% of employees who apply.) These scholarships are for \$6,000 per year and are renewable for up to eight years of study. The total number of active scholarships in 2024 is 30, including 22 students who were selected in previous years and are continuing their studies with our support.

Scholarship applications for 2025 opened in November 2024 and closed February 5, 2025. These new applications will be reviewed and rated by four members of the BVF Scholarship Committee and five reviewers from our partner, Collier Community Foundation (CCF). One advantage of our partnership with CCF is that students who apply for the “Bentley Wings” Competitive Scholarship are also considered for 70+ other scholarship programs administered by CCF. New scholarship awardees will be announced in May 2025.

BVF is considering restructuring the scholarship program and held one meeting with CCF to develop options for 2026 scholarships. Discussions are ongoing, and any changes will be announced before the applications open for 2026.

Committee Membership: Joan Frey and Wendy Wiltse, Co-chairs

Chuck Brooke, Aubin Ames, Jeanne Berger, Sue Leonard, Cliff Anzilotti, Bob Mahr, Marlene Geier, Dawn Kerth, Helen Roth, Patricia Dabbar.

February 15, 2025

2024 PROGRAMS COMMITTEE

Summary: Program Committee is pleased to report that we met all of our goals and objectives as outlined in the strategic plan for 2024. We would like to thank the Board of Trustees for their support and the needed resources, especially Sue Leonard (communications); William Welbourn (Executive Committee), Sandy Lyons (Administrative Support, and Steven Kissinger (Finance) We also would like to thank Penny Smith and her staff of Vi at Bentley Village for offering vital cooperation, assistance, and support throughout the year., especially Food and Beverage, Lifestyle, Housekeeping and Concierge.

Community Outreach:

- Literacy Council Ongoing: 10-12 Volunteers; 10-20 students annually
- Baker Senior Center - Singalong - Doug Williams (Provided In-Kind)- Biweekly 25-50 attendees each session.
- FGCU Academy Adult Education – Twice Weekly 20-70 attendees average pre session
- Citizenship Awards – One in 2024
- Community Music Therapy Outreach –Two sessions of 25 patients

Cultural Arts and Education

- Staged Performances - Various vendors Eleven - average 170 attendees
- Met HD Opera Series - Metropolitan Opera average 60 attendees.
- Forum Presentations – Forum-Subcommittee –average 100 attendees
- Music and Memory Educational Presenters – Two presentations.

Mindfulness

Two Series by Angela Tarkini Sanders – average 25 attendees

Participatory Music

- Belles & Beaus (30 participants - Weekly during Spring and Fall Season. Two performances 30 members
- Bentley Barbershoppers Weekly during season – 9 members
- Bentley Musicians - As requested.

- Ukelele Lessons - 2 groups Weekly Vendor (temporarily without a leader; seeking new instructor) 12 participants in 2 groups.
- Singalongs IL – Bi-weekly - Doug Williams

Music Therapy – Contracted Services

Music Therapy Group – ALR	1/wk.
Mondays Music Therapy Group - Memory ALR	1/wk.
Wednesdays Music Therapy Group - Care Center	1/wk.
Wednesdays Music Therapy Group – IL	1/wk.
Friday Music Therapy Individuals - Care Center	1/wk.
Mondays Music Therapy Drum Group - Care Center	1/wk.
Thursdays Music Therapy Individuals - Care Center	1/wk.
Therapy Group Pilot- Out-Reach	2

291 Total Sessions Delivered in 2024

Memory Care/ ALR Groups 103 Sessions
 Care Center Groups 80 Sessions
 Care Center Individuals 56 Sessions
 Independent Living Groups 50 Sessions
 Outreach Skilled Nursing Groups 2 sessions

Program Committee Co-Chairs: Diane Halas and Sharon Bailey

2024 Members: Jill Augustine, Barbara Nielsen, Beth George, Elizabeth Harrington, Jeannie Hutzler; Leilani Brenner); Nancy Wallace, Sue Leonard.

Members who Stepped down in late 2024: Susan Sterner.

Committee Volunteer Assistants who stepped down in late 2024: Carol Mulder; Joyce Taylor

Awards Subcommittee: Diane Halas, Sharon Bailey, Barabara Nielsen, Jeannie Hutzler, Bill Welbourn

Forum Subcommittee: Sue Leonard, Leilani Brenner, Jeannie Hutzler, Frank Halas

Committee Support and Board Liaison: Sandy Lyons, BVF Administrative Coordinator, Bill Welbourn, Vice President

2024 COMMUNICATIONS COMMITTEE

Summary: The Communications Committee is pleased to report that we met our goals for 2024. We would like to thank the Board of Trustees for their support and the needed resources, especially Diane Halas and Sherry Bailey (Programs), Wendy Wiltse and Joan Frey (Scholarships), William Welbourn (Executive Committee), Sandy Lyons (Administrative Support, and Steven Kissinger (Finance) A special thanks to Joan Frey for developing the scholar bios for the October Happenings issue. We also would like to thank Penny Smith and her staff of Vi at Bentley Village for offering vital cooperation, assistance, and support throughout the year, especially the Concierge and Tram Drivers for delivering and posting flyers and distributing Happenings in resident cubbies. Thanks also to Tim Dahlby, Employee Relations, who posted Scholarship publicity on the Employee Portal and promoted the scholarships at management meetings.

Happenings Newsletter

The Happenings newsletter was published five times in 2024. These issues are posted in the footer of bentleyvillagefoundation.org.

1. January – Programs: Music Therapy; Memorials and Tributes
2. April – Volunteer Issue
3. July – Programs: Belles and Beaus, Boots & Bling Recap; Memorials and Tributes
4. October – Scholarships: Dollars for Scholars Issue
5. December – Scholarships: Dollars for Scholars thank you.

Website

- The website was updated throughout the year, including Events, Event Photos, Scholarship bios, Happenings Issues and miscellaneous other updates.
- The Foundation issued a Request for Quote to three website providers for website redesign. Pennisi Marketing won the bid.

Volunteers Solicited and engaged two new volunteers based on bios of new residents from the Sales Office.

Scholarships Posted three ads for employees on the Employee Portal. Created two Dollars for Scholars Happenings issues.

Programs

- Posted bulletin board flyers for Program Events.
- Created programs for Whitney Grace, Belles and Beaus Concerts, 3 operas, and Brass Music Elements.
- Developed movie for Boots & Bling registrants to describe live auction.
- Developed movie with Assisted Living Lifestyle Director, Assisted Living Resident and Belles and Beaus participant to show before live auction to promote the impact programs have on residents.
- Bought sign holders for 11 X 17 posters to display outside restaurants for events.
- Posted flyers by restaurants for Doug Williams events, Del Prados, Brass Music Elements
- Sent email reminders for operas, Doug Williams
- Developed constant contact reminders for several events during the year.

Forum

- Created cubby notices for League of Women Votes event (cancelled due to hurricane)

Dollars for Scholars

- Developed online auction website.
- Developed info sheet about online silent auction and distributed in new building cubbies.
- Developed and posted flyers for online silent auction by restaurant stations and take-out area.
- Developed and posted three publicity spots for online auction using Constant Contact.

- Developed slide show for Donors and Sponsors shown during banquet.
- Developed slide show for live auction and worked with the auctioneer to coordinate the slide show and the auction.
- Developed and posted Donor/sponsor thanks posters for the dining rooms and take-out have been posted.
- Sent press release to Pam Fultz, VI Community Relations Manager, for publication in local papers. Will post in the news section of the website when they are published.

Annual Report

- Developed Annual Report distributed to Annual Meeting participants and in cubbies.

Communications Committee: Sue Leonard, Chair

2024 Members: Sherry Bailey, Diane Halas, Sandy Lyons, Karen Rosenstein, Leslie Simon, Kathy Smith, Paul Theado,

Committee Support and Board Liaison: Sandy Lyons, BVF Administrative Coordinator, Wayne Antworth, President, Bill Welbourn, Vice President, Chuck Brooke, Treasurer, Steven Kissinger

February 20, 2025

2024 VOLUNTEER COMMITTEE

The volunteer committee was formed in early 2024 as one of the responses to a weakness described in our Strategic Plan, about recruiting and maintaining Foundation volunteers. It is completing its first year as a standing committee.

The committee functions as a developer of plans to recruit volunteers needed to support a functioning Foundation. Its focus is to maintain volunteer levels at the standing committees, with an emphasis on redundancy in the chair positions, tracking overlapping tenure in the volunteer positions, and keeping proper skill sets for the committee functions.

The committee coordinates with Vi Lifestyle in introducing the Foundation to new residents at Vi's "Getting to know Bentley Village" presentations. Lifestyle also provides the committee with bios of new residents, for us to match their skill sets with the needs of the Foundation.

The initial 2024 goals of the committee were as follows:

1. Recruit and develop a person for the role of Corporate Secretary
2. Work with the Development Committee to find chairs for "Dollars for Scholars."
3. Recruit and develop people for the roles of Finance Chair/Treasurer & Asst. Treasurer
4. Work with the Ad Hoc committee to hire an Administrative Assistant
5. Recruit and transition a person to chair the Program Committee
6. Assign a chair to the Communications Committee & website sub-committee.
7. Maintain adequate staffing at each of the standing committees.

As the year went on the Foundation was also presented with the need to fill the Development Chair & Communications Chair positions for 2025. So, the Volunteer Committee had much work to do.

The committee happily reports that most of its initial goals were accomplished, with new recruits for “Dollars for Scholars,” Corporate Secretary, Finance Chair, Program Chair, Treasurer and Assistant Treasurer. Going forward, our goals for 2025 are to fill the Development Chair and Communications Chair positions and to recruit members for the standing committees that need help. We heartily invite the residents here at Bentley to help us fill these positions. **MAKE AN IMPACT** by joining us as volunteers in providing the scholarships and programs that serve our neighbors so well and that form the Foundation’s mission.

William “Bill” Welbourn, Chair

February 20, 2025