

# Corporation Board Report

October 7, 2025



|                           |   |
|---------------------------|---|
| Finance.....              | 1 |
| Financial Statements..... | 2 |
| Advancement.....          | 7 |
| Operations.....           | 9 |

## Finance

---

### FY25 – June Results for the Villa

- June closed the year approximately \$1,375,000 ahead of budget.
- The Villa had a larger than normal contingency built in to the June 2025 budget due to concerns and unknowns at that time related to Flagler funding and campus capital needs.
- A budget surplus does not equate to cash in the door, as there are receivables to be collected and liabilities still to be paid for the fiscal year. Approximately \$2.5mil in receivables outstanding at 6/30/25.
- Numerous capital and programmatic needs across campus are being evaluated and prioritized as we monitor the cash flow.
- The Annual Fund continued its success through the end of June. As of June 30, the Annual Fund raised almost \$727,000, 123% of its annual goal!

### FY26 – July Results for the Villa

- Complete closing of the month of June in preparation for the audit takes priority and delays the normal July and August reporting cycles; however August was closed last week and reported \$160 thousand ahead of budget for the two-month period.
- Day Support and Outpatient Behavioral Therapy are both ahead of budgeted revenue as of the end of August. Enrollment and utilization appear to be running smoothly.
- Education enrollment is slightly behind budget at this time; however the service systems are saving on expenses budgeted, primarily employee costs, due to vacancies and changes in benefits.
- Medicaid Day Treatment Services are reporting lower than budgeted enrollment and authorizations and are working to increase utilization of units allowed. Mental Health Skill Building is not budgeted for FY2026 but is still working to clear-out its client base as the service authorizations run out for each individual.
- The Annual Fund had several large gifts in July and August, including the proceeds from the car show, and is ahead of budget by \$22 thousand for the two-month period.

### Audits – FY25

- The audit for the Foundation began September 15th and is nearly complete. Keiter performed the majority of this audit remotely.
- The audit for the Villa began September 22nd. Keiter will be on site for the majority of this audit. Substantial areas of information have already been completed and work continues on several smaller areas and A-133 Federal Awards testing.
  - The Villa audit includes Section A-133 testing of Federal Awards given the threshold of Federal dollars received during the fiscal year.
- The audit for the Housing Corp. is nearly complete. Forvis Mazars performed this audit remotely primarily with Landmark Properties. HUD has a September 30th deadline to upload financials to the REAC portal. The delay of the Audit Compliance Supplement from the Office of Management and Budget has created some issues with this deadline.

## Financial Statements

**ST. JOSEPH'S VILLA**  
**FY 2025 SUMMARY OPERATIONS REPORT**  
**FOR YEAR ENDED JUNE 30, 2025 - PRELIMINARY - UNAUDITED**

7/31/2025

| <b>PROGRAM</b>                          |           | <b>ACTUAL*</b> | <b>FY2025<br/>BUDGET*</b> | <b>F/(U) VAR</b> | <b>FY2024<br/>ACTUAL*</b> | <b>FY25-FY24<br/>F/(U) VAR</b> |
|-----------------------------------------|-----------|----------------|---------------------------|------------------|---------------------------|--------------------------------|
| CHILDREN'S EDUCATIONAL SERVICES         | REVENUE   | 4,225,254      | 4,533,361                 | (308,107)        | 3,698,992                 | 526,261                        |
|                                         | EXPENSE   | (3,463,450)    | (3,795,327)               | 331,877          | (3,373,901)               | (89,549)                       |
|                                         | INDIRECT  | (308,724)      | (320,465)                 | 11,741           | (277,684)                 | (31,039)                       |
|                                         | SUB-TOTAL | 453,080        | 417,569                   | 35,511           | 47,407                    | 405,673                        |
| AUTISM EDUCATIONAL SERVICES             | REVENUE   | 9,039,567      | 9,568,770                 | (529,203)        | 8,034,579                 | 1,004,989                      |
|                                         | EXPENSE   | (6,046,918)    | (6,829,333)               | 782,415          | (5,644,015)               | (402,903)                      |
|                                         | INDIRECT  | (561,594)      | (476,852)                 | (84,742)         | (411,648)                 | (149,946)                      |
|                                         | SUB-TOTAL | 2,431,055      | 2,262,585                 | 168,470          | 1,978,915                 | 452,140                        |
| FLAGLER HOUSING & HOMELESS SERVICES     | REVENUE   | 3,155,874      | 3,040,697                 | 115,177          | 3,141,452                 | 14,422                         |
|                                         | EXPENSE   | (2,813,378)    | (2,909,035)               | 95,657           | (3,006,963)               | 193,585                        |
|                                         | INDIRECT  | (340,742)      | (350,604)                 | 9,862            | (315,759)                 | (24,983)                       |
|                                         | SUB-TOTAL | 1,754          | (218,942)                 | 220,696          | (181,270)                 | 183,025                        |
| COMMUNITY TRAINING AND SUPPORT SERVICES | REVENUE   | 56,975         | 80,000                    | (23,025)         | 47,045                    | 9,930                          |
|                                         | EXPENSE   | (132,734)      | (150,040)                 | 17,306           | (138,754)                 | 6,020                          |
|                                         | INDIRECT  | -              | -                         | -                | 0                         | 0                              |
|                                         | SUB-TOTAL | (75,759)       | (70,040)                  | (5,719)          | (91,709)                  | 15,950                         |
| DEVELOPMENTAL DISABILITIES SERVICES     | REVENUE   | 1,584,613      | 1,694,189                 | (109,576)        | 1,260,188                 | 324,425                        |
|                                         | EXPENSE   | (1,649,524)    | (1,513,204)               | (136,320)        | (1,401,126)               | (248,398)                      |
|                                         | INDIRECT  | (174,058)      | (181,432)                 | 7,374            | (154,920)                 | (19,137)                       |
|                                         | SUB-TOTAL | (238,968)      | (446)                     | (238,522)        | (295,858)                 | 56,889                         |
| DAY TREATMENT SERVICES                  | REVENUE   | 1,111,037      | 1,808,594                 | (697,556)        | 1,155,121                 | (44,083)                       |
|                                         | EXPENSE   | (1,303,018)    | (1,571,606)               | 268,588          | (1,240,859)               | (62,159)                       |
|                                         | INDIRECT  | (230,037)      | (235,585)                 | 5,548            | (208,015)                 | (22,022)                       |
|                                         | SUB-TOTAL | (422,018)      | 1,403                     | (423,421)        | (293,753)                 | (128,265)                      |
| BEHAVIORAL HEALTH SERVICES              | REVENUE   | 1,661,216      | 1,783,528                 | (122,312)        | 1,641,394                 | 19,822                         |
|                                         | EXPENSE   | (1,665,996)    | (1,750,216)               | 84,219           | (1,844,421)               | 178,425                        |
|                                         | INDIRECT  | (174,879)      | (166,275)                 | (8,604)          | (143,814)                 | (31,065)                       |
|                                         | SUB-TOTAL | (179,659)      | (132,963)                 | (46,697)         | (346,841)                 | 167,181                        |
| CLIENT SUPPORT SERVICES                 | REVENUE   | 76,159         | 58,983                    | 17,176           | 83,282                    | (7,123)                        |
|                                         | EXPENSE   | (723,177)      | (718,290)                 | (4,887)          | (660,074)                 | (63,103)                       |
|                                         | INDIRECT  | 158,971        | 151,362                   | 7,609            | 117,581                   | 41,390                         |
|                                         | SUB-TOTAL | (488,046)      | (507,945)                 | 19,899           | (459,211)                 | (28,836)                       |
| AGENCY SUPPORT SERVICES                 | REVENUE   | 972,474        | 748,980                   | 223,494          | 940,378                   | 32,096                         |
|                                         | EXPENSE   | (3,709,467)    | (5,079,365)               | 1,369,897        | (3,104,300)               | (605,167)                      |
|                                         | INDIRECT  | 1,631,063      | 1,579,850                 | 51,213           | 1,394,508                 | 236,555                        |
|                                         | SUB-TOTAL | (1,105,931)    | (2,750,535)               | 1,644,604        | (769,414)                 | (336,516)                      |
| * TOTAL REVENUE                         |           | 21,883,170     | 23,317,102                | (1,433,932)      | 20,002,431                | 1,880,739                      |
| TOTAL EXPENSE                           |           | (21,507,663)   | (24,316,416)              | 2,808,753        | (20,414,413)              | (1,093,250)                    |
| TOTAL INDIRECT                          |           | 0              | (0)                       | 0                | 248                       | (248)                          |
| TOTAL OPERATIONS                        |           | 375,507        | (999,314)                 | 1,374,821        | (411,734)                 | 787,241                        |

\* Actual and Budgeted revenue does not include the subsidy to the Villa of \$.999 million for FY2025 and \$.990 million for FY2024

**ST. JOSEPH'S VILLA**  
**FY 2026 SUMMARY OPERATIONS REPORT**

9/29/2025

**FOR TWO MONTHS ENDED AUGUST 31, 2025 - PRELIMINARY - UNAUDITED**

| <b>PROGRAM</b>                          |           | <b>ACTUAL*</b>     | <b>FY2026<br/>BUDGET*</b> | <b>F/(U) VAR</b> | <b>FY2025<br/>ACTUAL*</b> | <b>FY26-FY25<br/>F/(U) VAR</b> |
|-----------------------------------------|-----------|--------------------|---------------------------|------------------|---------------------------|--------------------------------|
| CHILDREN'S EDUCATIONAL SERVICES         | REVENUE   | 374,201            | 441,559                   | (67,358)         | 502,300                   | (128,099)                      |
|                                         | EXPENSE   | (449,764)          | (523,125)                 | 73,361           | (415,981)                 | (33,783)                       |
|                                         | INDIRECT  | (51,116)           | (61,798)                  | 10,682           | (47,694)                  | (3,422)                        |
|                                         | SUB-TOTAL | (126,680)          | (143,364)                 | 16,685           | 38,624                    | (165,304)                      |
| AUTISM EDUCATIONAL SERVICES             | REVENUE   | 1,349,039          | 1,437,480                 | (88,441)         | 1,330,560                 | 18,479                         |
|                                         | EXPENSE   | (850,004)          | (977,524)                 | 127,520          | (878,485)                 | 28,481                         |
|                                         | INDIRECT  | (50,467)           | (61,916)                  | 11,449           | (67,674)                  | 17,207                         |
|                                         | SUB-TOTAL | 448,568            | 398,039                   | 50,529           | 384,401                   | 64,167                         |
| FLAGLER HOUSING & HOMELESS SERVICES     | REVENUE   | 443,724            | 496,353                   | (52,630)         | 441,781                   | 1,943                          |
|                                         | EXPENSE   | (374,857)          | (435,177)                 | 60,319           | (375,244)                 | 386                            |
|                                         | INDIRECT  | (55,674)           | (65,854)                  | 10,180           | (45,605)                  | (10,069)                       |
|                                         | SUB-TOTAL | 13,193             | (4,677)                   | 17,870           | 20,932                    | (7,739)                        |
| COMMUNITY TRAINING AND SUPPORT SERVICES | REVENUE   | 7,900              | 8,333                     | (433)            | 525                       | 7,375                          |
|                                         | EXPENSE   | (11,027)           | (9,052)                   | (1,975)          | (17,960)                  | 6,933                          |
|                                         | INDIRECT  | (1,931)            | (2,313)                   | 381              | 0                         | (1,931)                        |
|                                         | SUB-TOTAL | (5,058)            | (3,032)                   | (2,027)          | (17,435)                  | 12,377                         |
| DEVELOPMENTAL DISABILITIES SERVICES     | REVENUE   | 234,268            | 214,040                   | 20,228           | 206,762                   | 27,506                         |
|                                         | EXPENSE   | (225,034)          | (229,249)                 | 4,215            | (247,480)                 | 22,446                         |
|                                         | INDIRECT  | (23,047)           | (27,560)                  | 4,513            | (23,374)                  | 327                            |
|                                         | SUB-TOTAL | (13,813)           | (42,769)                  | 28,956           | (64,092)                  | 50,279                         |
| DAY TREATMENT SERVICES                  | REVENUE   | 98,405             | 103,075                   | (4,670)          | 185,306                   | (86,902)                       |
|                                         | EXPENSE   | (121,072)          | (118,755)                 | (2,317)          | (190,770)                 | 69,699                         |
|                                         | INDIRECT  | (14,395)           | (16,829)                  | 2,434            | (31,192)                  | 16,797                         |
|                                         | SUB-TOTAL | (37,062)           | (32,509)                  | (4,553)          | (36,656)                  | (406)                          |
| BEHAVIORAL HEALTH SERVICES              | REVENUE   | 524,143            | 592,901                   | (68,758)         | 479,195                   | 44,948                         |
|                                         | EXPENSE   | (455,700)          | (471,594)                 | 15,894           | (413,568)                 | (42,132)                       |
|                                         | INDIRECT  | (36,254)           | (42,918)                  | 6,664            | (21,548)                  | (14,706)                       |
|                                         | SUB-TOTAL | 32,190             | 78,389                    | (46,199)         | 44,080                    | (11,890)                       |
| CLIENT SUPPORT SERVICES                 | REVENUE   | 11,053             | 13,914                    | (2,861)          | 11,963                    | (910)                          |
|                                         | EXPENSE   | (112,148)          | (132,298)                 | 20,150           | (103,710)                 | (8,437)                        |
|                                         | INDIRECT  | 16,251             | 15,933                    | 318              | 26,860                    | (10,609)                       |
|                                         | SUB-TOTAL | (84,844)           | (102,451)                 | 17,607           | (64,888)                  | (19,956)                       |
| AGENCY SUPPORT SERVICES                 | REVENUE   | 87,887             | 73,500                    | 14,387           | 152,926                   | (65,039)                       |
|                                         | EXPENSE   | (481,749)          | (595,148)                 | 113,399          | (468,377)                 | (13,371)                       |
|                                         | INDIRECT  | 216,633            | 263,254                   | (46,621)         | 210,227                   | 6,406                          |
|                                         | SUB-TOTAL | (177,229)          | (258,394)                 | 81,165           | (105,225)                 | (72,004)                       |
| <b>* TOTAL REVENUE</b>                  |           | <b>3,130,619</b>   | <b>3,381,155</b>          | <b>(250,536)</b> | <b>3,311,318</b>          | <b>(180,699)</b>               |
| <b>TOTAL EXPENSE</b>                    |           | <b>(3,081,354)</b> | <b>(3,491,923)</b>        | <b>410,568</b>   | <b>(3,111,576)</b>        | <b>30,222</b>                  |
| <b>TOTAL INDIRECT</b>                   |           | <b>(0)</b>         | <b>0</b>                  | <b>(0)</b>       | <b>(0)</b>                | <b>0</b>                       |
| <b>TOTAL OPERATIONS</b>                 |           | <b>49,265</b>      | <b>(110,768)</b>          | <b>160,032</b>   | <b>199,742</b>            | <b>(150,477)</b>               |

\* Actual and Budgeted revenue does not include the subsidy to the Villa of \$.951 million for FY2026 and \$.999 million for FY2025

# St Joseph's Villa Foundation

## Portfolio Assets (As of June 30, 2025)

| <u>Investment</u>                                        | <u>Market Value</u>         |
|----------------------------------------------------------|-----------------------------|
| Schwab - Funding <sup>(2)</sup>                          | \$ 14,528                   |
|                                                          | <u>\$ 14,528</u>            |
| Brown:                                                   |                             |
| Schwab - 1184                                            | \$ 1,945,649                |
| Schwab - 2524                                            | \$ 2,282,565                |
| Schwab - 4472                                            | \$ 0                        |
| Schwab - 6835                                            | \$ 7,483,011                |
| Schwab - 7192                                            | \$ 612,789                  |
| Schwab - Gregg                                           | \$ 363,218                  |
|                                                          | <u>\$ 12,687,231</u>        |
| Vanguard:                                                |                             |
| Main                                                     | \$ 14,679,167               |
| Gregg                                                    | \$ 429,920                  |
| Sub-total                                                | <u>\$ 15,109,087</u>        |
| Alternatives:                                            |                             |
| Harbinger Class L <sup>(1)</sup>                         | \$ 820                      |
| Harbinger Class PE <sup>(1)</sup>                        | \$ 4,801                    |
| Sub-total                                                | <u>\$ 5,621</u>             |
| <b>Total Invested Balance</b>                            | <b><u>\$ 27,816,468</u></b> |
| (1) as of September 30, 2021 - no updated balances since |                             |
| (2) as of October 31, 2023                               |                             |
| Expenses Due to Villa                                    | \$ (21,430)                 |
| Deposits Due from Villa                                  | \$ 5,766                    |
|                                                          | <u>\$ (15,664)</u>          |
| <b>Total Portfolio</b>                                   | <b><u>\$ 27,800,804</u></b> |

### Full Redemption Schedule for Alternatives

|                    |         |
|--------------------|---------|
| Harbinger Class L  | Unknown |
| Harbinger Class PE | Unknown |

**St Joseph's Villa Foundation**  
**Portfolio Assets (As of August 31, 2025)**

| <u>Investment</u>                                        | <u>Market Value</u>         |
|----------------------------------------------------------|-----------------------------|
| Schwab - Funding <sup>(2)</sup>                          | \$ 14,529                   |
|                                                          | <u>\$ 14,529</u>            |
| Brown:                                                   |                             |
| Schwab - 1184                                            | \$ 1,970,257                |
| Schwab - 2524                                            | \$ 2,305,633                |
| Schwab - 4472                                            | \$ 0                        |
| Schwab - 6835                                            | \$ 7,654,847                |
| Schwab - 7192                                            | \$ 613,260                  |
| Schwab - Gregg                                           | \$ 370,047                  |
|                                                          | <u>\$ 12,914,044</u>        |
| Vanguard:                                                |                             |
| Main                                                     | \$ 15,141,032               |
| Gregg                                                    | \$ 443,443                  |
| Sub-total                                                | <u>\$ 15,584,475</u>        |
| Alternatives:                                            |                             |
| Harbinger Class L <sup>(1)</sup>                         | \$ 820                      |
| Harbinger Class PE <sup>(1)</sup>                        | \$ 4,801                    |
| Sub-total                                                | <u>\$ 5,621</u>             |
| <b>Total Invested Balance</b>                            | <b><u>\$ 28,518,670</u></b> |
| (1) as of September 30, 2021 - no updated balances since |                             |
| (2) as of October 31, 2023                               |                             |
| Expenses Due to Villa                                    | \$ (21,430)                 |
| Deposits Due from Villa                                  | \$ 5,766                    |
|                                                          | <u>\$ (15,664)</u>          |
| <b>Total Portfolio</b>                                   | <b><u>\$ 28,503,006</u></b> |

**Full Redemption Schedule for Alternatives**

|                    |         |
|--------------------|---------|
| Harbinger Class L  | Unknown |
| Harbinger Class PE | Unknown |

St. Joseph's Villa Foundation  
Portfolio Overview quarter ended **June 30, 2025**

|                           | Fiscal 1st<br>Quarter | Fiscal 2nd<br>Quarter | Fiscal 3rd<br>Quarter | Fiscal 4th<br>Quarter | Since<br>Inception | Calendar<br>2024 |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------|------------------|
|                           | 7/1/24 - 9/30/24      | 10/1/24 - 12/31/24    | 1/1/25 - 3/31/25      | 4/1/25 - 6/30/25      | (A)                | 1/1/24-12/31/24  |
| Beginning Market Value    | 25,797,563            | 27,408,116            | 26,372,867            | 26,355,708            | 23,200,587         | 25,109,299       |
| Net Flows (Transfers-SJV) |                       |                       |                       |                       | (6,598,013)        | (742,820)        |
| Total Income/Expenses     | (21,201)              | (593,461)             | (21,432)              | (571,626)             | (2,150,317)        | (800,052)        |
| Gross Earnings            | 1,631,753             | (441,788)             | 4,273                 | 2,016,721             | 13,348,546         | 2,806,440        |
| Dividends/Capital Gains   | 128,176               | 443,921               | 106,467               | 131,930               |                    | 816,431          |
| Accrued Income            |                       |                       |                       |                       |                    | -                |
| Realized                  | 34,620                | 148,218               | 40,181                | 284,141               |                    | 402,498          |
| Unrealized                | 1,468,957             | (1,033,928)           | (142,375)             | 1,600,651             |                    | 1,587,511        |
| Ending Market Value       | 27,408,116            | 26,372,867            | 26,355,708            | 27,800,804            | 27,800,804         | 26,372,867       |

<sup>(A)</sup> Beginning Market Value represents initial amount transferred to Brown Advisory accounts \$11,425,643 on 7/10/18 and initial amount transferred to Vanguard accounts \$11,433,735 on 10/12/18 and market value held by Harbinger and Schwab funding 7/1/2018

## Advancement

---

### FY25 Results

|                    |                     |
|--------------------|---------------------|
| Annual Giving:     | \$936,279           |
| Private Grants:    | \$1,352,960*        |
| Government Grants: | \$5,434,178         |
| Speaking/Training: | \$59,475            |
| <b>Total:</b>      | <b>\$7,782,893*</b> |

### FY26 Progress

|                    |                    |
|--------------------|--------------------|
| Annual Giving:     | \$104,363          |
| Private Grants:    | \$541,475          |
| Government Grants: | \$581,542          |
| Speaking/Training: | \$7,900            |
| <b>Total:</b>      | <b>\$1,235,280</b> |

\*Excluding Housing Success Center

### Annual Giving

- The annual fund raised more than ever in FY25, totaling \$725,266 (133% of \$590,000 goal and \$45,000 more than FY24). We had fewer donors in FY25 than we had in FY24, but we received nearly 100 more gifts. The average unrestricted gift size was \$790 and 123 donors increased their annual gift. Our retention rate increased from 70% to 71% – this is compared to a 42% national average.
- We distributed nearly \$150,000 in NAP credits in FY25 and placed a particular emphasis on encouraging increased gifts from IRAs. We received \$102,000 credits to give out in FY26.
- Thus far in FY26, we have raised \$104,363 from annual donors. Of this, \$97,420.45 supports the annual fund, 14% of our \$720,000 goal.
- CEO appeal dropped in August to 900 donors and the fall appeal will be hitting mailboxes in October. Both are accompanied by an eblast request. Beginning in FY25, we expanded our mail lists to try to convert in-kind donors into financial donors. We've seen some success with this, converting 8 longtime in-kind supporters last year.
- Birdies for Charity is LIVE and this may be the last year to take advantage of the 10% bonus. Please consider making a gift before 10/19!

### Grants and Major Gifts

- We were awarded \$6,787,138 in Private and Government grants in FY25. In addition to this, we reached \$3,734,828 in funds raised for the Housing Success Center (106% of goal). We also welcomed a new major donor to the family, who has committed to supporting Flagler with a \$50,000 annual donation.
- Thus far in FY26, we have received \$541,475 in private grants for Flagler and CATS and have \$750,000 out in pending requests. Our restricted fundraising priorities are Flagler, CATS, Mental and Behavioral Health, and capital funds (administration roof, stained glass window replacement, protective wall barriers).

### Planned Giving

- We currently have 60 Archway Society members (36 legacy members and 24 living members). In FY25, we received Dave Redmond's insurance gift and honored his legacy at the Innsbrook Classic; started sending birthday cards to individuals turning 70 ½ which coincided with a noticeable increase in IRA giving; and documented a new \$300,000 planned gift intention!
- In August, we celebrated National Make-a-Will Month with an educational eblast directing people to the estate planning resources located on our website.

- In December, we'll host our Annual Archway Society Holiday Luncheon and we hope to feature a conversation from experts at Brown Advisory on estate planning.

## Events and Trainings

- In FY25, John conducted 91 hours of training in front of nearly 1,500 people. His efforts brought in nearly \$60,000.
- The Innsbrook Classic had another record year, raising more than \$135,000. We were joined by 228 golfers (57 teams) at the Federal Club and paid special tribute to Dave Remond on what would have been his 81st birthday.
- The AACA Car Show was another huge success in June, bringing in more than \$12,000 to support the Villa. In all, we hosted or were the beneficiaries of 18 events in FY25.
- In FY26, we welcomed golf sponsors to campus for a networking breakfast; we participated in the DECC 5k in September; and we're hard at work planning the Housing Success Center Grand Opening – save the date for November 14th!

## Volunteers and Community Engagement

- In FY25, 507 volunteers contributed nearly 4,000 hours of service to the Villa, representing \$120,000. 35 community groups held at least one off-campus collection drive, and we welcomed 21 volunteer groups to campus (outside of our Capital One Season of Hope program).
- We remain very grateful for our partnership with Capital One, Altria, and the Community Foundation, who provided nearly \$80,000 in support for volunteer projects to make improvements to “the Hawks Nest,” Cottage 7/Day Support, the CRC, and our Back-to-School initiative.
- Season of Hope served 400 clients in FY25, and nearly 500 items were donated from our Amazon Wishlist. We were also able to distribute more than 200 holiday meals to families. This year, we've already been working with Capital One to revamp the Season of Hope program. Their pro-bono team has created a new tool to help us identify what needs our clients have in order to make the program as meaningful as possible for the families we serve.
- We've wrapped up “Back to School” for FY25 and were able to provide all teachers, students, and classrooms with the supplies they need for the upcoming year. SouthState Bank, Capital One, and Altria were huge supporters of this by hosting collection drives like SouthState's Stuff the Bus event, and by hosting on- and off-site volunteer events to organize supplies stuff backpacks for distribution.

## Marketing Communications

- In FY25, we launched a new Villa website with updated content and improved navigation; we partnered with Henrico County's PR team to secure media coverage celebrating the first anniversary of our Crisis Receiving Center; and we engaged with policymakers through campus visits and Villa Lobby Day at the Virginia General Assembly.
- The Sarah Dooley Center for Autism has been rebranded as the Villa Education Center (VEC). Rebranding efforts included building a new web page, updating print marketing materials, installing new interior and exterior signage, and a video announcement featuring VEC students and staff.
- An architectural photo shoot of the Housing Success Center will be completed this month, ahead of the grand opening. Images will be used for public relations, marketing materials, awards submissions, and fundraising for future projects.
- Recent advocacy activities:
  - Virtual meeting with Rep. Abigail Spanberger's health policy advisor (Sept. 17)
  - National Alliance to End Homelessness Virtual Capitol Hill Day (Sept. 17)
  - Autism Advocacy Coalition Planning Retreat (Sept. 19)
  - Delegate Mike Cherry campus tour (Sept. 23)

## Operations

---

The campus is alive with hope and excitement as a new school year begins, new projects come together, new staff join the Villa, and fall is in the air! Many activities have brought us together to work, play, celebrate, and plan.

On July 23, we held our annual community service day. All clients and staff came together for the day to complete numerous projects that organized, purged, shredded, cleaned, and beautified. It is time for us to collectively improve our environment and make the campus a better place.

On August 14, we had our annual staff awards celebration. We started with a breakfast buffet and an awesome staff raffle! This was followed by years of service and special recognition awards. Approximately 20 staff received years of service awards ranging from 5 to 35 years! Other staff were recognized for outstanding work individually and in teams in areas such as leadership, dedication, teaching, counseling, etc.

Our COA (Council on Accreditation) Self-Study has been submitted. The next phase is to prepare for the site visit scheduled for October 27-29, 2025.

## Services

- As you know, we were working towards merging Dooley School and Sarah Dooley Center for Autism. In working with our licensing representative, it became apparent that there were many barriers and challenges to overcome in a merge – some of which were not in the best interest of our students. As a result, we pivoted, and even without a full merger, decided to continue our plan to incorporate the two schools under the same administrative infrastructure and align policies, procedures, and processes. We restructured the schools and now have an Education Director and a Clinical Director position that will oversee both, replacing the Dooley Principal and SDCA Senior Director.
- We chose The Villa Education Center (VEC) as the new name for the merged schools. Since the merger did not occur, we decided to use it to rename Sarah Dooley. This change was official on July 1, 2025.
- We offered the Director of Education position to Dr. Melissa Naumann. She will replace Adam Dreyfus (SDCA) and Diana Morris (Dooley) as the education leader for both schools. We are still searching for a clinical leader to continue the successful clinical model established by Adam Dreyfus. Melissa will begin on September 22.
- The private day funding issue has resurfaced once again. The Executive Director of the Office of Children's Services presented his concerns to the Children's Services Act's State Executive Council about the rising costs of private day placements. He will be facilitating a follow up discussion on September 11. Our legislative advocate and a VAISEF representative are prepared to present the private day perspective at this meeting likely in rebuttal to the Director's presentation. Private day rates do continue to climb due to increased costs, qualified staff shortages, and an ever-growing number of children diagnosed with autism.
- Education staff returned to campus on August 11 for a week's worth of staff training and development before the students returned from summer break. This week without students is a training luxury for the schools!
- On August 5, Flagler staff (Richmond) moved back to campus. They are temporarily housed in Cottage 6 until Cottage 5 – the new Flagler Housing Success Center – opens in late October. They are so excited to be moving into a beautifully renovated space and to be a part of the campus community.
- All Flagler HUD grants have now been made official with signatures for this year! This was a huge relief for Flagler operations.

- As of June 30, the youth component of Day Support has been discontinued due to low enrollment. The adult component continues to operate and thrives with more than 40 clients.
- We paused enrollment for Mental Health Skill Building and are working towards transitioning this service out of Community Based and into Flagler services. This is a bit on hold as the state (Department of Medicaid Services) adopts new initiatives to replace current services know as “legacy services” (intensive in-home, MHSB and Day Treatment). This change occurs July 1, 2026.
- We are in the process of collecting and evaluating annual outcome data. This includes service operational reports, Human Resource annual data, client outcomes, client satisfaction surveys, and staff, community and board satisfaction surveys. Results should be prepared and presented at the next board meeting.

## Human Resources

- We are now working with Scott Insurance. They replace Managed Benefits as our health insurance broker.
- The Virginia Council for Private Education (VCPE) and the Virginia Association of Independent Special Education Facilities (VAISEF) performed an unannounced, first ever audit of staff background checks on May 19. We changed our background check procedures and now check all staff backgrounds at hire and every 4 years.

## Strategic Plan

- John Sarvay (Florican) submitted the final draft of the operationalized strategic plan. It is under final review, and we hope to move forward with full implementation this month.

## Risk Management

- We finalized the FY25 Risk Management Plan. It has been uploaded to the Board portal.
- We initiated the FY26 Risk Management Plan to include public relations, risk impact and risk probability categories as requested by the Board of Trustees.
- We upgraded and increased our walkie talkies to improve communication across campus and to interface with our mass communication system to relay emergency information to our staff.