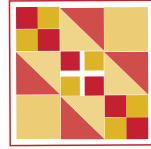


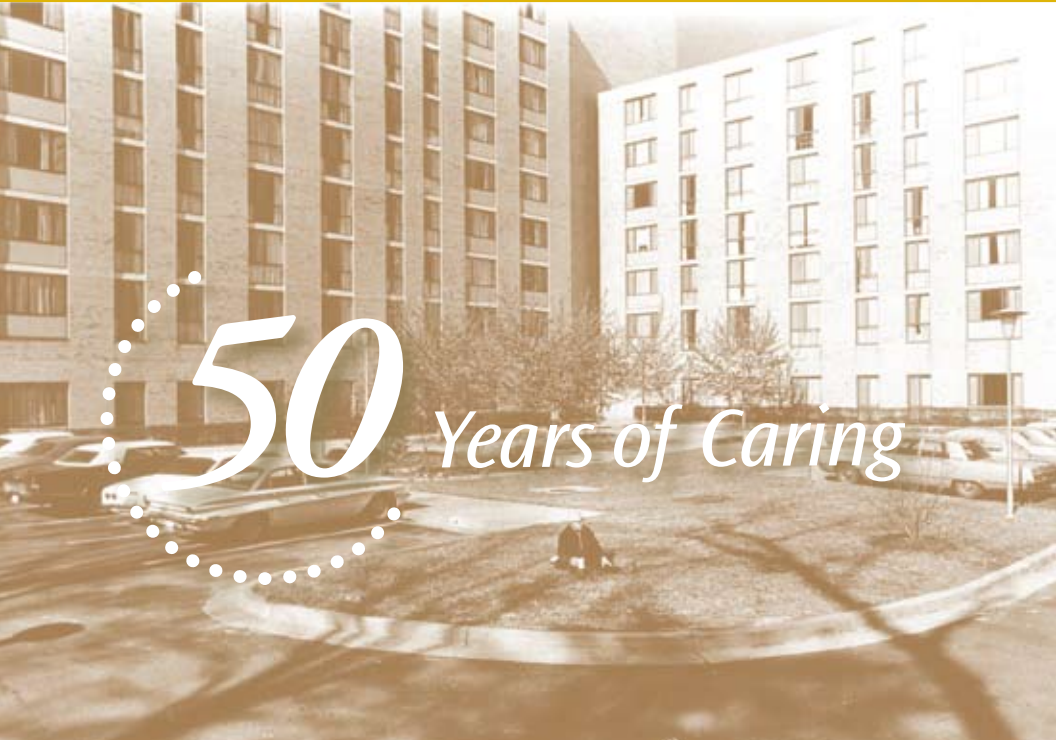
Annual Report 2010



# Fellowship Square

Foundation, Inc.

**50** *Years of Caring 1960-2010*





# Fellowship Square

Foundation, Inc.

## BOARD of DIRECTORS:

### *President*

Mr. Charles R. Wortman

### *Vice President*

Rev. Larry Schmidt

### *Treasurer*

Rev. Richard Reichard

### *Secretary*

Mr. Dallas Evans

### *Assistant Secretary*

Ms. Kelly Amorin

*Director*, Ms. Joanne Brownsword

*Director*, Rev. Ron Christian

*Director*, Mr. Brian Grzelak

*Director*, Dr. C. David Hartmann

*Director*, Mr. Vernon Krueger

*Director*, Mr. Phillip London Jr.

*Director*, Dr. Myra Niemeier

*Director*, Mr. James Spedden

*Director*, Mr. John Thillmann

### *Executive Director*

Mr. James Garrett

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## Dear Friend and Corporate Member,

This year Fellowship Square will celebrate its 50th anniversary of providing low income housing for the elderly and disabled. This is no small accomplishment for a non-profit. We have cared for thousands of people over the years. We have provided stability to a vulnerable population through both economic downturns and prosperous times. Our services have allowed residents to live independently for years longer than they would have without our care.

This year we were able to refurbish the social areas at Largo Landing creating not only a new, contemporary look but also defining conversation and gaming areas. The residents have shared their excitement with family and friends. Our maintenance program has included significant work on our aging infrastructure and equipment.

We have partnered with congregations and individuals to provide Winter Boxes to all of our residents at Lake Anne I and II as well as Hunters Woods. Our “extras” such as Resident Service Coordinators, on-site maintenance, 24 hour security and pastoral care set us apart. We continue to seek opportunities to expand programs that will make a difference for our residents.

We would have never survived and expanded for 50 years without our wonderful volunteers. For 50 years we have depended on board members, volunteers at each of the houses, local businesses and the religious community. Our renewed commitment to reach out to congregations and other businesses to tell our story has been well received. For a third year in a row Lutheran Lay Fellowship has made a significant contribution to the Wegener Chaplaincy Fund including matching gifts from Thrivent.

We live in a time that makes it difficult to forecast what the needs of our residents will be. We see proposed cuts in everything from transportation to Medicare, Medicaid and other vital resources currently being proposed on the local, state and federal levels. In the coming year we will need to address the shortfalls of support for our residents in new and creative ways.

Together donors, volunteers, staff, and board and committee members form a unique partnership that allows an abiding commitment to the care of our residents. Because of this, I know that we will be able to shape the future in a way that will benefit our residents.

Please join me on November 14, 2010 at Good Shepherd Lutheran Church, Reston, VA for our 50th Anniversary Celebration. After all, we wouldn't be who we are without dedicated volunteers like you. We wouldn't want to miss a chance to celebrate this together.

A handwritten signature in dark ink, appearing to read "James F. Garrett". The signature is fluid and cursive, written in a professional style.

Sincerely,  
James F. Garrett  
Executive Director



## A Note from the President

Change is the only constant, it is said. All sustained growth and life comes from changing and adapting to new situations, new challenges and new possibilities. With new possibilities comes choice, and contemplating the pros and cons of each decision to be made and evaluating the eventual ramifications on those most affected as a result of the decisions places much responsibility on those who are charged with the tasks at hand.

It is with this in mind that I entered into the first year as President of Fellowship Square Foundation, Inc. There are many tasks to be performed and many ideas yet to be realized. On the other hand, there is an inherently simplistic view of things which requires nothing more than looking at the nearly 800 residents situated in our 5 Fellowship Houses scattered across the Washington Metro Area and musing “are they safe and what more can we do for them?”

Looking forward can be a daunting task. But as with many things, I tend to look back at what has transpired before, as history is the great teacher of many things with lessons to be learned that help ameliorate concerns while lending perspective to those issues that must be dealt with in the future. We will be 50 years old in November of this year. We did not come this far by mere happenstance. The astute leadership of Dr. John A. Scherzer has led us to where we are today, with his vision of affordable housing for the elderly and handicapped going into the 21st century being tied to national housing policies, the national economy, the budget process and funding. He envisioned Fellowship Square being involved with smaller, self-contained units in areas of existing need instead of the large 200-250 unit projects that have been the hallmark of our growth. Dr. Scherzer also envisioned the need of working with existing senior citizen centers and other large retirement communities currently providing assisted or independent living, as well as exhausting all other opportunities to serve the rapidly growing elderly population.

With this in mind, we have a blue-print that may be utilized in planning out the genesis of the next 50 years of growth for Fellowship Square. There are initiatives in the pipeline, too numerous to mention in the confines of this message, that are being explored and consistent with those visions that emulated from Dr. Scherzer. We have a capable Executive Director supported by a Board of Directors that will provide the leadership and momentum to carry on the mission of Fellowship Square for many years to come. With your prayers and support I look forward to serving the Foundation of which I am proud to be a part.

Sincerely,

A handwritten signature in black ink, appearing to read 'C. Wortman', written in a cursive style.

Charles R. Wortman  
President/Chairman of the Board of Directors



# Fellowship Square

Foundation, Inc.

50 Years of Caring 1960-2010

## Looking back...

### *Dr. Scherzer's Vision*

*Fellowship Square has had a remarkable history from its early beginnings. As early as the 1950's, John Scherzer saw the need for elderly housing.*



### **Largo Landing Groundbreaking**

*Keister, Hartmann, Scherzer, Selinsky, and Berger*





While serving at St. Matthews Lutheran Church Dr. Scherzer was able to inspire a group to shape his dream into reality, eventually leading to five Fellowship Houses, serving 800 seniors and disabled persons in Maryland and Virginia.

Our founder had a dream that low income seniors and the disabled should have access to affordable and safe housing. Dr. Scherzer and the leaders of Fellowship Square knew that low income seniors not only needed housing but also additional services that allow a higher quality of life.

By 1960 the group was able to incorporate and become what we know today as Fellowship Square. What was different about their vision was that they knew that the elderly and disabled needed not only quality housing but quality of life. This has set Fellowship Square apart from other providers of affordable housing.

Throughout this 50 year history, we have relied on the generosity of caring people – such as you – who believe that seniors and the disabled deserve decent and affordable housing, no matter how low their income may be.

We are truly grateful for the support from the Department of Housing and Urban Development. The unrestricted gifts from others – individuals, congregations, businesses, civic groups, and foundations – have helped Fellowship Square provide a remarkable quality of life for the whole person. With these funds, we have been able to assist residents with food, transportation, medications, pastoral care, and other needs that greatly enhance their quality of life – and truly make our houses a fellowship of friends.

# ...and Looking Forward

We have countless stories of people like Janice who have used their grocery money to buy medications, or John who needed an electric wheelchair, or Margaret who needed help with housekeeping in order to stay in her home.

Now, as Fellowship Square celebrates its 50th year, we look back at what has been done and look forward to what we can still accomplish.

We thank all our volunteers and donors for their generous support that has made Fellowship Square what it is today. Please consider renewing your commitment to this important work by making a special financial gift. Your gift will provide the foundation for us to move ahead into our next half century – to improve and expand the services we provide our residents.



# Hunters Woods Fellowship House

## HUNTERS WOODS ELDERLY DEVELOPMENT, INC.

In addition to reviewing and approving budget and audit documents, the Board of Directors at HWED spends a great deal of time discussing how we can best serve the myriad of needs of the residents and ways to integrate the various groups through common activities.

The ethnic diversity of the residential makeup at Hunters Woods Elderly Development has undergone dramatic change in the past few years, and will continue to experience more change in the years to come. To be responsive to the challenges and possibilities that come with this broad diversity, the Board continues to educate and organize itself in a way to help the Fellowship House meet the needs of all the different ethnic groups who reside there.

To help the Board members better understand the impact of these changes, the Board met with Administrator Luis Conde-Lopez and the Resident Service Coordinator to get their perspectives and advice on how the Board can best assist the residents.

We continue to explore ways to obtain additional services for the residents, to encourage local congregations to host activities for the residents and to involve the larger community in the life of Hunters Woods Fellowship House.

*Respectfully submitted by  
Jorn Dalboe, President*

### **Board Members are:**

Joanne Brownsword, Sidney Johnson, Marjorie Joy, Shirley Metzger, Adrian Pelzner, Rev. Suzanne Rudiselle, and Allen Wild







## Statistics:

OCCUPANCY PERCENTAGE:	100%
Residents: Total number, male/female:	277 total, 85 males, 192 females
Average Age:	76
Number of Disabled Residents under 62:	3
Number of Male Head of Household:	67
Number of Female Head of Household:	155
Number of Couples	55

*Observations: Continued increase in the number of residents of Asian descent and the number of couples residing in the building has remained constant.*

Average Tenant Income:	\$780/month
Average Tenant Rent:	\$251/month

### AGE RANGE IN PERCENTAGES:

under 62:	1%
62-69:	16%
70-79:	48%
80-89:	29%
90-99:	6%
100 or over:	0%

Oldest resident:	female, 99
Youngest resident:	male, 40
Average length of stay:	7.5 years

### RESIDENT COMPOSITION BY NATIONAL ORIGIN:

Asian	45%
Middle Eastern	22%
Russian	16%
American (Caucasian, African American)	12%
Hispanic	5%

WAITING LIST: Number of Applications:	294
Asian	89%
American	5%
Hispanic	3%
Middle Eastern	3%

## Top 3 issues facing residents:

1. Cost of ambulance transportation
2. Dental services: insurance doesn't typically cover dental care
3. Communication: Non-English speaking residents are forced to rely on volunteers or family for assistance.

## Social services utilized by residents:

- |                               |                  |     |
|-------------------------------|------------------|-----|
| • Supplemental food services: | Ensure-          | 13  |
|                               | USDA-            | 109 |
| • Flu shot clinics:           |                  | 117 |
| • Homemaker support services: |                  | 50  |
| • Wills on Wheels:            |                  | 9   |
| • Transportation services:    | Varies with need |     |





Dental care is expensive and none of the social welfare programs that are available cover this important medical need. Fellowship Square staff has helped to find dentists who have taken patients on a voluntary basis. But there are never enough dentists for 800 people to have full dental care. Because of your donations to the Gift Fund, our residents can ask for financial support for dental check-ups, cavity care and dentures.

# Lake Anne I & II Fellowship House

As the original Fellowship House, built almost 50 years ago, Lake Anne continues to attract a broad range of residents. The redecoration of the social areas was well received by the residents and families and has been a catalyst for a new group of residents entering the building. The diversity of our residents is consistent with the ever-changing landscape of Northern Virginia.

While LAFH faces aging issues, we maintain the highest standard in providing a safe, secure home. Despite the financial challenges faced by this property, it remains a very attractive and well-run building. Our reviews by HUD and VHDA exceed industry standards.

Many thanks to the small but dedicated staff of LAFH.



## Statistics:

<b>OCCUPANCY PERCENTAGE:</b>	LAI: 94%	LAI: 88%
<b>Residents: Total number, male/ female:</b>	LAI: 151 total, 56 males, 95 females	LAI: 104 total, 36 males, 68 females
<b>Average Age:</b>	LAI: 73	LAI: 76.1
<b>Number of Disabled Residents under 62:</b>	LAI: 10	LAI: 5
<b>Number of Male Head of Household:</b>	LAI: 55	LAI: 36
<b>Number of Female Head of Household:</b>	LAI: 77	LAI: 52
<b>Number of Couples:</b>	LAI: 18	LAI: 16

*Observations: Remodeling the 1st floor lobby, living room and community room has created a renewed appreciation among the existing residents. Most enjoy the amenities of round-the-clock security and live-in maintenance staff.*

<b>Average Tenant Income:</b>	LAI \$1,067/month	LAI \$795/month
<b>Average Tenant Rent:</b>	LAI \$499/month	LAI \$693/month contract rent/\$853 market rent
<b>AGE RANGE IN PERCENTAGES:</b>	<b>LAI</b>	<b>LAI</b>
Under 62:	8.6%	4.8%
62-69:	27.8%	13.5%
70-79:	39.7%	48.1%
80-89:	20.5%	28.8%
90-99:	3.3%	4.8%
100 or over:	0.0%	0.0%
<b>Oldest residents:</b>	LAI Female 96	LAI Female 97
<b>Youngest residents:</b>	LAI Male 38	LAI Male 53
<b>Average length of stay:</b>	5 years	

<b>RESIDENT COMPOSITION BY NATIONAL ORIGIN:</b>	<b>LAI</b>	<b>LAI</b>
Caucasian	57.0%	63.5%
African American	16.6%	3.8%
Indian (American)/Alaskan	3.3%	2.9%
Asian	23.2%	29.8%
Hispanic	4.0%	2.9%
Non-Hispanic	96.0%	97.1%

**WAITING LIST:** Number of Applications: 90

*Observations: We have more Asians of Chinese decent applying for housing at LAFH. The majority of the applicants are Asians, followed by Iranians and Caucasians.*

## Top 3 issues facing residents:

1. Affordable and timely dental care
2. Managing increasingly complex medical regimens
3. Meeting daily self-care needs as they age in place

## Resources Commonly Used by LAFH Residents:

- Federal/State :** Supplemental Security Income  
Medicaid  
Medicare  
Food Stamps  
General Relief Income  
USDA TEFAP Food Program  
VICAP (Insurance Counseling)
- Fairfax County:** Family Services Adult Services Case Management and Home Care  
Adult Protective Services  
Senior Center  
Reston Community Center for fitness and life enriching programs  
Reston Association for Free Pool and Tennis passes  
Fastran Group Trip Buses, Dial-A-Ride, Seniors-on-the Go,  
MetroAccess, RIBS buses for transportation  
Fairfax County Health and Dental Clinics  
North West Center for Mental Health
- Local/Private:** Reston Interfaith for emergency food and Clothing Vouchers  
Herndon-Reston FISH for emergency rent, medical, transportation assistance  
Community Church outreaches  
Jeannie Schmidt Medical Clinic in Herndon  
Good Shepherd Fund  
Legal Services of Northern Virginia for Free Wills and Advanced Directives  
Pastoral Care, visitation, group projects, and financial support from local churches



Helping our residents stay healthy is one of our most important goals. Our residents have access to monthly blood pressure clinics and special workshops that cover subjects such as diabetes education, nutrition or mental health. With these opportunities available on-site and provided by Fellowship Square even our most disabled residents can continue to care for their own health education.



# Lake Ridge Fellowship House

## LAKE RIDGE ELDERLY DEVELOPMENT, INC.

The community has been very active in supporting the residents of LRFH. The local Rotarians donated both their time and materials to build an outdoor grill just off the patio. Members of the board joined together to donate a CD player for the social hall. Thanks also to the many volunteers who dedicate their time and energy to enhancing the lives of LRFH residents.

After reviewing a potential refinancing of the property, the board decided to table the initiative until we reach an agreement with HUD to utilize the proceeds for other affordable housing projects.

The staff has earned recognition for excellent management of the property, both physically and fiscally.

*Respectfully submitted by  
Dr. Harold A. Deadman, President*

### **Board members are:**

Rev. David Bohannon, Hugh Miller,  
Dr. C. David Hartmann, Rev. Robert Allard,  
Cynthia Medvick and Robert Wilcox





## Statistics:

OCCUPANCY PERCENTAGE:	100%
Residents: Total number, male/female:	104 total, 19 males, 85 females
Average Age:	74.6
Number of Disabled Residents under 62:	2
Number of Male Head of Household:	19
Number of Female Head of Household:	80
Number of Couples:	5

*Observations: The male resident population continues to increase and the resident population average age is getting younger.*

Average Tenant Income:	\$1,171/month
Average Tenant Rent:	\$ 316/month

### AGE RANGE IN PERCENTAGES:

under 62:	2.88%
62-69:	20.20%
70-79:	45.20%
80-89:	24.03%
90-99:	7.69%
100 or over:	0.00%



Oldest residents:	5 females, 91-93 1 male, 93
Youngest resident:	male, 53
Average length of stay:	6.9 years

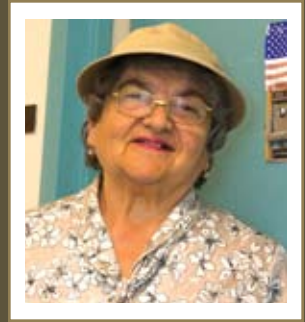
### RESIDENT COMPOSITION BY NATIONAL ORIGIN:

Caucasian	70%
African American	17%
Hispanic	9%
Asian	4%

WAITING LIST: Number of Applications:	100
	12 couples
	20 males
	80 females
	11 needing accessible units

*Observations: Applicant wait time has remained constant as have the number of applicants on the list.*

In January Anna went to fill her prescription and found her benefits exhausted, leaving an \$800 medication bill. Because Fellowship Square has a social worker in each of our buildings Anna was able to turn to us for help. Our social worker coordinated with the doctor and the insurance company to reduce the cost of the medication. The balance of the cost was covered by the Gift Fund.



## Resident Relations:

Local churches continue to lend a helping hand: St. Matthew's Lutheran Church, Central Baptist Church and Lake Ridge Baptist Church.

## Residents participate in the following programs:

### County programs:

- Meals on Wheels (through PW County Senior Center) – 4 participants
- VA Extension Nutrition Classes – 21 participants
- Donated Dental – 5 participants
- Gift of Sight (with Lenscrafters) – 4 participants
- OmniLink bus service – 5 regular participants
- Relief of County Personal Property Tax program – 25 participants

### State programs:

- Social Services personal aides – 16 participants

### Federal programs:

- Medicaid – 31 participants
- QMB – 11 participants
- Legal Aid – 9 participants
- USDA Brown Bag program – 64 participants
- In-House Physician program – 10 participants

*Observations: The coming year will again bring requests for assistance with transportation to doctor appointments outside the local area. Residents often have financial difficulty paying for (specifically): hearing aids, glasses, and false teeth. There are a few organizations that will provide some help when they can, but the financial burden on the resident is often more than they can afford. Often times, they go without the needed item(s).*



Going to the doctor can be a difficult journey when you're approaching 90. Knowing that consistent medical care is an important part of health, our Fellowship Houses have set aside an area for medical services. With the help of Fellowship House staff, residents that need to be seen in house are identified. Because we know our residents and their needs we can help make the journey of aging healthier.

# Largo Landing Fellowship House

## LARGO LANDING ELDERLY DEVELOPMENT, INC.

A swirl of activities surrounded the recently completed upgrades of the social areas at Largo Landing. New furniture, custom draperies, hardwood flooring, energy-efficient lighting and granite give the appearance of an upscale hotel. The residents and their families are enjoying the new look and are spending more time socializing in the conversation areas.

Our accomplishments include:

- Operating at full occupancy for the last year
- 83 applicants on the waiting list
- FY2010 budget was approved by the Maryland Department of Housing and HUD with a 4.3% rent increase
- FY 2011 budget has been approved by the LLED Board of Directors, requesting a 3.9% rent increase
- On March 2, 2010 the Maryland Department of Housing conducted their annual Management and Occupancy Review for which the property received an above average assessment

Largo Landing was included in:

- Congresswoman Edwards' Town Hall meeting with Largo Landing residents. Ms. Edwards, 4th District of Maryland, answered questions and addressed concerns over the proposed federal health care legislation.
- Prince Georges County Executive Jack Johnson's Thanksgiving luncheon for the Largo Landing residents.
- Maryland Accessible Telecommunications (MAT) seminar for LLFH residents. The MAT program supplies phones for seniors having difficulty using a standard phone due to sight or hearing disabilities.

*Respectfully submitted by  
Vernon Krueger, President*

### **Board members are:**

Elsie Draughn, Morris Hymes Sr., Ginny Lee, John Priebe, Judy Rudolf, Mary Ellen Wilmoth, Phillip Woodruff and Advisor John Corkill Jr.





## Statistics:

<b>OCCUPANCY PERCENTAGE:</b>	98%
Residents: Total number, male/female:	104 total , 21 males, 83 females
Average Age:	75.6
Number of Disabled Residents under 62:	6
Number of Male Head of Household:	21
Number of Female Head of Household:	82
Number of Couples	1

*Observations: Resident's average age at occupancy is 68.5yrs. Resident's average length of stay is 9 years and 7months, which is an increase over last year.*

Average Tenant Income:	\$1,125/month
Average Tenant Rent:	\$ 270/month

### AGE RANGE IN PERCENTAGES:

Under 62:	6%
62-69:	21%
70-79:	44%
80-89:	26%
90-99:	6%
100 or over:	0%

**Oldest residents:** 5 females, 92-98  
1 male, 93

**Youngest resident:** female, 45

**Average length of stay:** 9 years, 7 months



### RESIDENT COMPOSITION BY NATIONAL ORIGIN:

African American	84%
Caucasian	13%
Hispanic	3%

<b>WAITING LIST:</b>	Number of Applications: 87	
	Ethnicity: African American	87%
	Caucasian	10%
	Hispanic	3%

*Observations: The percentage of applicants with extremely low income has increased by 3% over last year.*

## **Resident Relations:**

*What agencies do residents depend on for support?*

### **City/County Services:**

Metro Access	30%
Prince Georges County Dept of Aging	
Home Health Aides	12%

### **Local food:**

Share Program	8%
Meals on Wheels	7%
Evangel Cathedral	Donates food Baskets for Thanksgiving
Jericho Church	Donates food on the 3rd Thursday of the month
Prince Georges County Fire Dept	Donates food baskets for Christmas
Prince Georges County Sheriff Dept	Donates food baskets for Christmas

*Observations: As the average length of stay has increased over the last year at Largo Landing, we anticipate an increase for in-home health assistance and transportation services for residents.*





Volunteers are a wonderful source of connection to the community for our residents. But did you ever consider who co-ordinates those volunteers? And even more, who determines whether the volunteers are appropriate for the task? Our staff is diligent about knowing who cares for our residents. They carefully match residents with care givers, thus insuring not only a good fit, but the knowledge that our residents are safe from abuse.

# FSF Executive Committee

The FSF Executive Committee serves under the auspices of the Board of Directors, consisting of seven members in accordance with our by-laws. Historically, the seven have included the four Officers of the Board, plus three other Directors as recommended by the President, with subsequent concurrence by the Board. The Committee meets on an “as needed” basis as a pre-cursor to the Board of Directors meetings which are typically held bi-monthly.

There are two important tasks assigned to the Executive Committee annually. One is the development of the annual review to measure the performance of the Executive Director; bringing a draft assessment to the full Board for consideration and ultimate approval. Also included in that important task is the framing of an Advance Work Plan for the Executive Director for the upcoming year. The other task is leading Fellowship Square’s Strategic Planning activities. The current Plan was originally written some years ago, and while it has been updated each year, a major overhaul is underway to ensure that we are staying the course in meeting the needs of our nearly 800 residents, as well as exploring viable opportunities to enhance the quality of life for others in the Washington Metropolitan Area that may be in need of our assistance.

I am excited to be involved in the planning of the celebration of our 50th anniversary on November 14, 2010. This is an event that is an appropriate and opportune moment to extol the virtues of Fellowship Square throughout our community, letting both individual and corporate concerns know that we are in the business of providing affordable housing to our seniors and those with disabilities, and that they would be well served to act as responsible members of the community with their support of our efforts. We thank you for yours!

*Respectively submitted by  
Charles R. Wortman, Chair*

**Members of the committee:**

Dr. Myra Niemeier, Rev. Larry Schmidt and  
Dr. C. David Hartmann



# Finance Committee

The Finance Committee reviews the financial reporting of the Foundation and works with staff to ensure compliance with auditor recommendations and board directives.

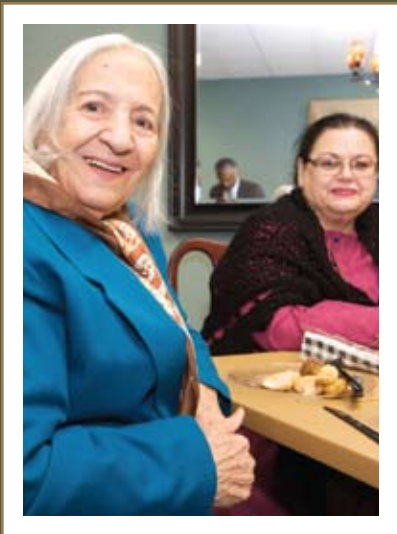
During the past year, the committee declined the establishment of a revolving Line of Credit, evaluated the feasibility of refinancing the Lake Ridge property and analyzed the financial challenges of the Lake Anne 1 property to find a solution to augment cash flow.

The Foundation has successfully completed annual fiscal audits and continues to foster and maintain positive relationships with HUD and VHDA. This work is valuable and an essential part of the mission of the Foundation.

*Respectfully submitted by  
James Spedden, Chair*

**Members of the committee are:**

Charles R. Wortman, Dr. Harold Deadman, Rev. Richard Reichard, Marva Benn, Rev. Doug Jones and Allen Wild

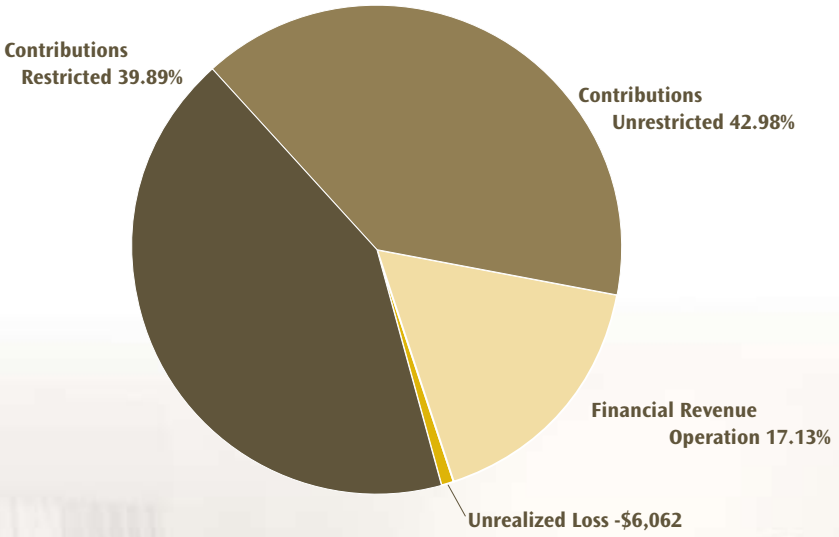


**B**eatrice has struggled with arthritis since she was a young girl. She uses a cane and a walker provided by Medicare. But when she needed an electric wheel chair Medicare denied her claim. Our social worker was able to help her obtain the kind of wheel chair she needed. With the electrical wheel chair Beatrice has resumed living a full life, attending social gatherings outside her building and doing her own shopping. Fellowship Square has made the difference. Beatrice has gone from being home bound to becoming a productive part of the community.

# Statistics: Gift Fund 2009

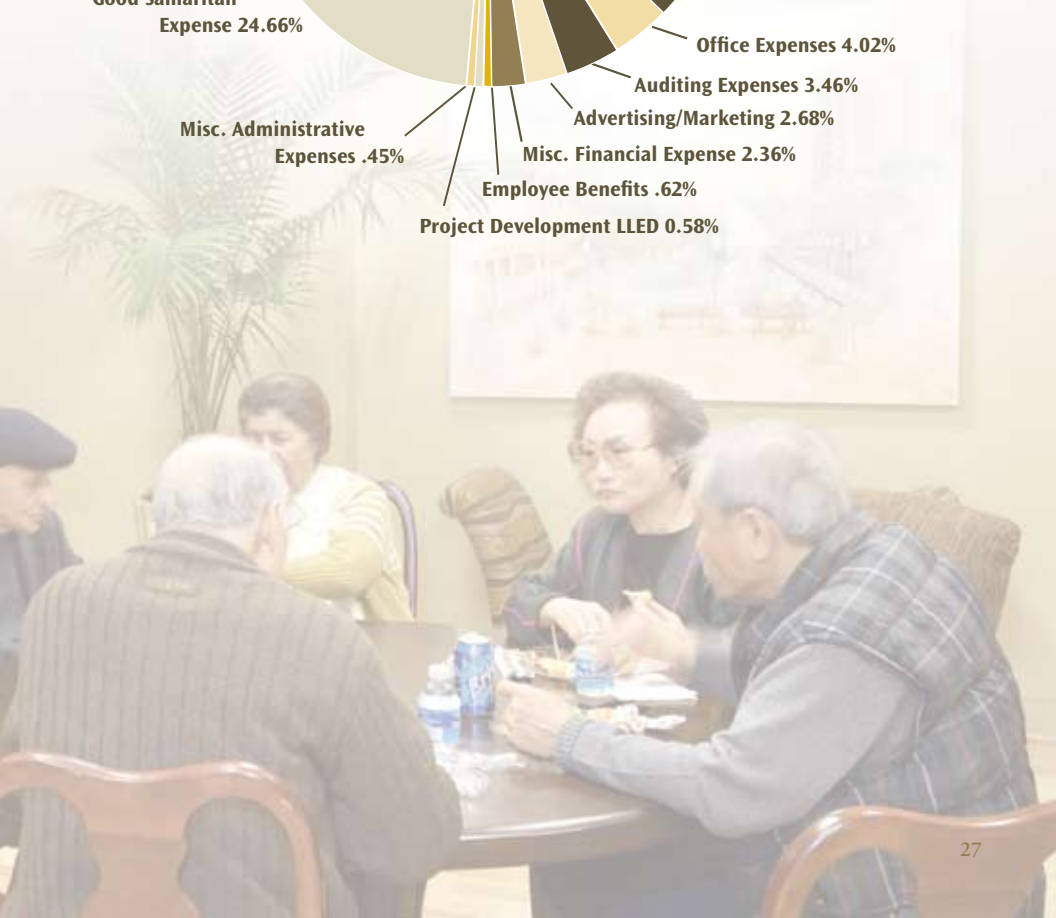
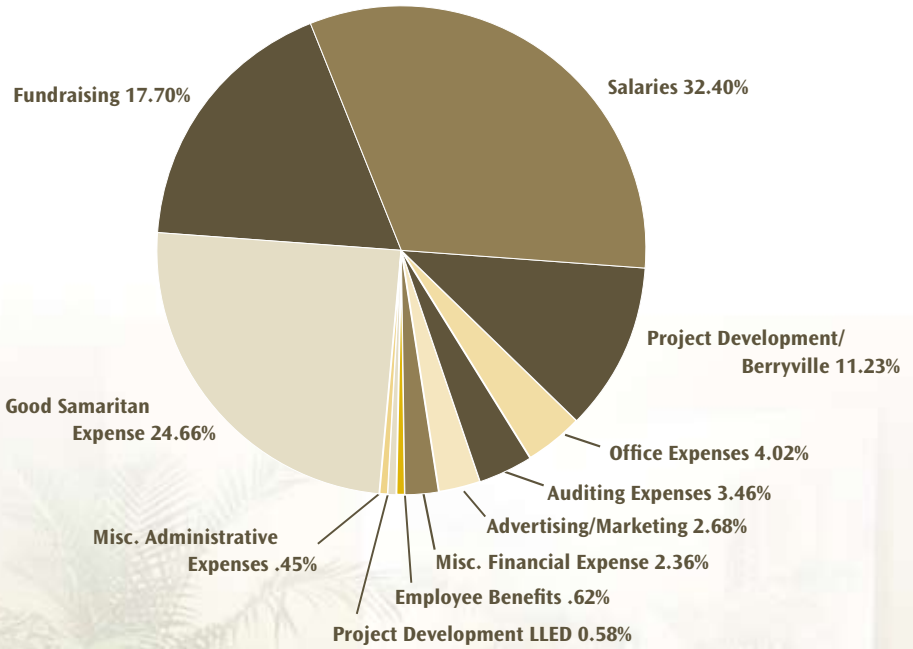
## Income Summary

**\$121,639.10**



# Expense Summary

**\$132,849.07**



# Pastoral Care Advisory Committee (PCAC)

## The PCAC continues to:

Seek to adapt the pastoral care program to ever changing social/cultural realities in resident demographics

- Encourage community building activity within each Fellowship House and between each FH and its surrounding neighborhood
- Invite participation in these ministries by volunteers and clergy from nearby churches and other religious or community organizations
- Partner with PR&RD in promoting financial support of this program
- Under gird, pray for and be supportive of the Chaplain in this ministry to residents

## In 2009-2010 the PCAC:

- Kept the Board of Directors and staff informed through its minutes and other documents
- Provided letters of thanks from PCAC to donors to the Wegener Chaplaincy
- Developed the PCAC Welcome Book, a handbook of resources for the committee
- Assisted in translating the Fellowship House Newsletters for non-English speaking residents
- Assisted PR&RD in contacting Corporate Members about opportunities to volunteer and give financial support

## As PCAC looks to the future it anticipates:

- Affirming the continuing need for the Pastoral Care/Chaplaincy Program at its current level.
- Assisting in the development of an annual “coffee / discussion” in each Fellowship House with clergy/religious leaders in neighborhoods near each FH.
- Seeking appropriate funding and leadership for a bi-annual educational event for clergy and laity on various aspects of “Theology and Aging” hosted by Fellowship Square.
- Continuing to partner with other committees of FSF as well as staff where areas of service blend.

*Respectfully submitted by  
Rev. K. Bernell Boehm, Chair*

### Members of the committee:

Rev. David Bohannon, Rev. Terry Hannon, Rev. Mark Hricko, Rev. Thomas O'Brien, Elaine Petersen, Rev. Larry Schmidt, Mary Schmidt, Lenore Stewart and Jennifer Zambone



# Wegener Chaplaincy

*“The mission of the Wegener Chaplaincy is to embody a church-related ministry of grace and hope to the elderly and the disabled, their families, and others who serve them.”*

In today’s culture, our most healthy “seasoned citizens” function best when they have something to do, something to hope for and someone to love. In 1,001 different ways, I try to make this come true for the 800 residents of our five Fellowship Houses.

In my monthly “*Chaplain’s Corner*” column, I try to tickle their imaginations, get them to laugh and remember, and to think about and cherish life’s deeper values. In my visits to residents in their apartments and common areas, I hope to re-present God’s incarnate love for them. In my worship services and Bible studies, I strive to make God’s Word personal and real. In my visits to hospitals and nursing homes, I aim to provide dignity and hope in the midst of life’s pain and uncertainties. And in my ministry at times of death, I seek to proclaim God’s victory over all that would frighten and depress us. On

your behalf, I conduct this ministry that is greatly needed—and much appreciated by our residents and their families.

As I stated clearly in last year’s report, this is not a ministry of evangelism to a few but a ministry of service to all—regardless of race, religion or ethnicity. Like St. Paul, I endeavor to be “*all things to all people*,” and to accept and learn from each resident something of the unique background that brought him or her to that Fellowship House and to understand the challenges and opportunities each sees in the years ahead.

My thanks to the staffs of our Fellowship Houses for their team spirit, to the Pastoral Care Advisory Committee for its advocacy, to Lutheran Lay Fellowship for its enthusiastic financial support, but mostly to our residents for their good humor and for sharing their rich stories of faith and life.

*Respectfully submitted by  
The Rev. David G. Berg, Chaplain*



Many of our residents have families who live throughout the country. Our social workers interface with families to help them understand the needs of their loved ones. As one family member told us, it is always better to be able to talk with someone who has seen your mother. It helps that we know our residents and know their needs.

# Public Relations and Resource Development Committee (PR&RD)

The PR & RD committee is responsible for soliciting and managing donations of “time, talent and treasure” from FSF friends, corporations, foundations, area worship communities, and FSF corporate members, directors and committees. Our goal is to manage those resources to maximize the benefits they bestow on the residents of our Fellowship Houses.

In 2009-10, the following five elements have been critical to the continued development of those resources for the Foundation.

1. Communicating FSF’s mission, central to growing FSF’s ministry to its residents, via:

- Attendance/membership in area chambers of commerce
- Presentations to community and church entities
- Quarterly publication of Fellowship Square Foundation’s newsletter, Prime Times
- Launching a new Facebook page
- Completion of an Appeal Network Study to identify congregational leaders or FSF Corporate Members near Fellowship Houses to increase congregational support of FSF Houses

- Planning FSF’s 50th Anniversary Celebration - Building the Foundation: Ideas to Action on November 14, 2010 at Good Shepherd Lutheran Church, Reston, VA

2. Setting fundraising and planning goals fundamental to providing the financial resources to support programs for our FSF residents via:

- The campaign for FSF’s 50th anniversary
- A comprehensive, multi-year, gift-raising program. Funds must meet the predicted needs of FSF residents and eliminate Gift Fund budget deficits within two years.

3. Developing Sources of Funding, such as Planned Giving and Other Major Gifts

4. Expanding the role of FSF leaders and corporate members in fundraising efforts via:

- Increased FSF Board involvement in identifying potential or actual donors through personal contacts
- FSF Board support of 50th anniversary

5. Encouraging direct support of Fellowship House residents by community entities providing:

- Emergency Fund contributions
- Welcome boxes for new residents
- Thanksgiving, Christmas and Easter cards and gifts
- Food donations
- Entertainment
- Events and parties
- Gifts in-kind

**Support is critical to the mission of FSF:**

- FSF residents' needs (outside of current budget allowances)
- Chaplaincy and Outreach Coordinator Programs

To accomplish this:

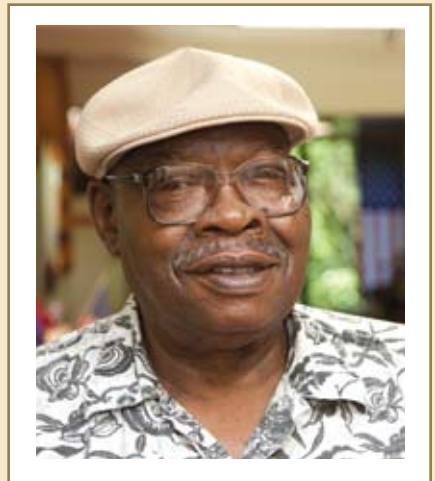
- Appeal letters were sent to Board, Corporate Members and FSF donors
- Continued membership in Lutheran Planned Giving re: estate planning
- Funding was received via United Way, Combined Federal Campaign, United Lutheran Appeal, Gifts of Hope, Lutheran Lay Fellowship, Lutheran Planned Giving Consortium and Thrivent

- [www.justgive.org](http://www.justgive.org) link was established on [www.fellowshipsquare.org](http://www.fellowshipsquare.org) for contributions
- A new 50th anniversary fund was established to help residents with emergencies and to help support FSF's Chaplaincy and Outreach programs
- A proposal to Dominion (Power) Foundation to fund remodeling of handicap-accessible apartments at Lake Anne Fellowship House is being developed

*Respectfully submitted by  
Myra Niemeier, Chair*

**Members of the committee:**

Alice Benson, Rev. K. Bernell Boehm, Dr. C. David Hartmann, Judy Koucky, Rev. Richard Reichard, Rev. Larry Schmidt



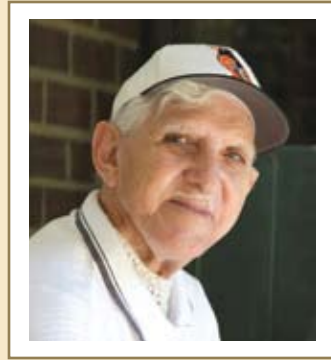


# Extending Options Committee

The Extending Options Committee is charged with exploring the needs of FSF residents and working with the staff members of each Fellowship House to determine what we might do by way of extending the options available to the residents that would enhance their quality of life.

The committee keeps in touch with the superb staffs of our Fellowship Houses in order to discern and assist with needs of the residents. The residents of Fellowship Square properties are being well cared for. Local churches and civic organizations help to expand the opportunities for social interaction and services for residents by offering parties, entertainment, fresh garden vegetables and Bingo. The houses have holiday programs, provided by FSF and outside organizations, and programs which highlight the increasingly international flavor of our houses. Social interaction is more difficult in houses where the population is more diverse. Finding ways to further the integration of residents is a continuing goal for the committee.

Last year, the committee engaged Ms. Sharon Lynn, Assistant Director, and Dr. Amy Trang, Multicultural Outreach and Program Coordinator, of the Fairfax Area Agency on Aging to speak to the Administrator and Resident Service Coordinator of



Hunters Woods, and the committee about ways to integrate foreign born and non-English speaking residents into a more cohesive community in the house. There is an air of acceptance for those who are foreign-born, yet another challenge is for those American-born residents who are now beginning to feel displaced.

We will continue to explore ways in which we can assist with day to day care. The committee is trying to find and expand the libraries, particularly seeking books in large print and foreign languages. Personal care assistance and transportation for those aging in place continue to be areas where we hope to do more for the people who live in our Fellowship Houses.

*Respectfully submitted by  
Suzanne Rudiselle, Chair*

## **Members of the committee:**

Judith Gordon, Dr. C. David Hartmann, Wanna Hinchee, Sidney Johnson, Rev. Fred Klein, Gabrielle Smith, James Stevens and Christine Sullivan

# New Opportunities Committee

The committee's primary focus is on two existing FSF assets: the Berryville property and the Lake Anne houses. The Berryville property represents an opportunity to raise capital to pursue future opportunities while Lake Anne represents both a challenge and opportunity in terms of eliminating the current operating deficit by way of capturing the potential value of additional density.

Our efforts to resolve storm water issues with the Town of Berryville are nearing conclusion. We have continued dialogue with the adjacent HOA regarding a required offsite easement. With the resolution of these two critical issues, site plan approval is attainable.

With Fairfax County's revision to the Comprehensive Plan, we achieved a significant level of success that will allow us greater flexibility in evaluating future options for the Lake Anne houses. It may now be possible to redevelop the property or sell off a portion of the site for additional development.

The Lake Anne Task Team is analyzing solutions for the cash flow deficit. It is likely that the long term solution for Lake Anne will involve the future options being explored by New Opportunities as discussed above. The

third party evaluation of the property, in terms of capital improvements and expenditures, provides a barometer of needs that will be required in the coming years as these properties approach their 40 year birthdays.

The committee continued to explore the idea of applying for a HUD grant for our Largo Landing property. The work towards the goal of submitting an application in 2010 requires a tremendous amount of work and outside support. It is a good exercise regardless of the outcome as it will be the first step towards someday expanding our ministry on a site that we already control.

Our committee members have the expertise that makes them ideally suited for working on the specific assets discussed above.

*Respectfully submitted by  
Brian Grzelak, Chair*

**Members of the committee:**

John Thillmann, Phillip London Jr.,  
Dallas Evans, Charles R. Wortman,  
Dan Western



**T**ransportation is a service that is difficult to find. Even more so is transportation out of the area to see specialists, therapists or other medical professionals. On short notice, even volunteers cannot meet their needs. Because Fellowship Square has the Gift Fund- we can ensure that our residents get to their appointments and emergency visits. The Gift Fund takes our residents places they would not be able to go without our help.

# Personnel Committee

In reviewing matters related to the employees of Fellowship Square and related employee benefits, the committee is assessing the revised regulations pertaining to our 403(b) retirement program. The FSF group insurance plan will also be evaluated prior to the benefit year and employer/employee contribution levels will be determined.

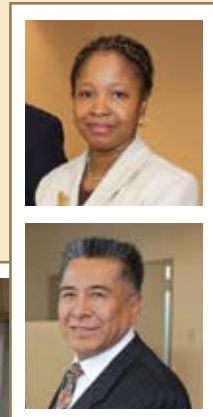
Future goals of the committee are to review and update the job descriptions for all positions and seek innovative techniques to retain and motivate valued staff. An on-going commitment to design ways to encourage staff to take advantage of the benefits currently available is in progress.

The employees of Fellowship Square can be assured that their best interests are being represented, thanks to efforts of the members of the personnel committee.

*Respectfully submitted by  
Bishop E. Harold Jansen, Chair*

**Members of the committee:**

Vernon Krueger, Anita Nolen, Leslie Spenser and Pat Shaulis



# Leadership Development Committee

This past year, the committee acknowledged the service of two Directors who retired from the Board; Morris Hymes, Sr. and Kraig Stoneman. We give thanks for their years of faithful service. Excellent candidates have been recruited to fill their positions as well as the positions of those whose three year terms end this year. We have also welcomed three new members to the Board: Dallas Evans, Ric Fisher, and James Spedden, elected at last year's annual meeting.

The ground work has been completed for an Advisory Board to be made up of interested persons willing to help further the mission of Fellowship Square, but removed from the responsibilities of being a Director.

A self-evaluation was conducted using a tool that helped us look at the effectiveness of the Board and its operations.

As our committee looks forward to the coming year we will:

- Consider and prioritize the needs of the FSF Board of Directors and suggest a candidate list of Directors for consideration by the Board and selection by the Corporate Membership
- Implement the FSF Advisory Board during the spring/summer of 2010, with the specific intent of using the AB for public relations and fundraising especially in this 50th anniversary year
- Conduct an annual Board Self Evaluation (next in 2011) and other selected evaluations of particular projects (2010 fundraising; gala events)
- Study and recommend an improved distribution of tasks among FSF committees and boards of auxiliary organizations and a way to implement changes
- Develop educational components in the Board meetings, and an annual planning workshop.

*Respectfully submitted by  
Rev. Larry Schmidt, Chair*

## **Members of the committee:**

Rev. Ron Christian, Dr. C. David Hartmann  
and Rev. Tom Knoll

# Donor Reports *from January 1, 2009 – January 1, 2010*

## Individual Donors

### Insuring the Future – \$5,000 - \$10,000

David & Aline Chen

### Encouraging Independence – \$1,000 - \$2,499

Dr. Harold A. & Mary Deadman

Dr. C. David & LaDonna Hartmann

Betty E. Fredericks

Judith A. Koucky

Rev. Larry & Sue Schmidt

### Building Community – \$500 - \$999

Bishop K. Bernell & Lola Beohm

Dorli Bokel

John A. Corkill

Linda Everett

Phillip London Jr.

Richard & Charlene Raphael

Mary Schmidt

Rev. William & Ellie Wegener

Larry & Susan Zimmerman

### Providing Shelter – \$100 - \$499

Shirley Banning

Alice Benson & Kirk Fitch

Joanne Brownsword

Richard Christensen

Bob Crawford

Jorn Dalboe &

Sara Leonard

William Douglas

Ric Fisher

Beverly Gardner

William Glass

Brian & Doreen Grzelak

Paul Gysan

Paula Hancock

Morris Hymes Sr.

Bishop E. Harold Jansen

Rev. Frederick &

Elizabeth Klein

Rev. Thomas &

Elizabeth Knoll

Wallace & Kathryn Knutsen

Vernon Krueger

David Lange

Phil Langehough

Stanley M. Leizear

Jean Lynch

Scott Mills

John & Esther Muller

The Niemeier Family

Anita Nolen

Howard Oberheu

John & Zoe Parker

Elaine Petersen

John & Bonnie Priebe

Rev. Richard & Melba

Reichard

Judy Rudolf

John Thillmann

James Stevens

Lenore Stewart

Craig Swanson

Sondra Williams

Maize Wilson

Charles R. Wortman

### Giving Hope – \$99 and below

Douglas Arendt

Joanne Bear

Daniel Bella

Ludwig Benner Jr.

Leroy Beutel

Margaret Brooke

Gail & Bonnie Burton

Rev. Faye Codding &

Rev. Steven Miller

Gaylord & Linda Christle

Eugene Dahlman

C.T. Ensminger

Phyllis T. Fredericks

Rev. Theresa Hannon

Jessie Hunsucker

Rev. Ivan Ives

Dorothy Kelsey

Lowell & Yvonne Knauf

David Lambert

Cristina Lewandowski

Lennart Lundberg

Said Maqsodi

Arlene Maroney

Calvin Martin

John McCoy

Daniel McMorrow

William & Virginia Murray

Harlan Oelke

Mike O'Neil

Adrian Pelzner

Bruce Randall

Orzan Sevimli

Patricia Shaulis

Fritz & Betsy Sholz

John & A. Ferrin

Simmons

John E. Smallin

Al Smuzynski

Edwin Triner

Helen Ann Vigness

## Memorial Gifts

Dansko, Inc.	In memory of Betty Best
Andrew C. & Beverly Gbur	In memory of Betty Best
B.A. Morgan	In memory of Betty Best
Richard Finger	In memory of Ethel Dautel
Clara & Everett Greinke	In memory of Jean Davidson
Keith & Dale Johnson	In memory of Loretta Johnson
Massimo Nigretto	In memory of Anna Katz
Alice Benson	In memory of Orval Kerchner
Madge Selinsky	In memory of Harold Selinsky
Bernice Swanson	In memory of Carl Swanson

## Planned Gifts

Harlan Oelke

## Congregations and Judicatories

### Congregations

Bethlehem Lutheran Church	1,200.00
Emmanuel Lutheran Church	2,730.00
Good Shepherd Lutheran Church	4,900.00
Metropolitan DC Synod of the ELCA	18,100.00
St. Andrew Lutheran Church	500.00
St. Anne's Episcopal Church	500.00
St. Nicholas Lutheran Church	500.00
St. Paul's Lutheran Church	500.00
United Christian Parish	800.00

### Religious Organizations

Gifts of Hope:	12,093.00
In-home Assistance	2,176.04
Meals	5,079.06
Medical & Pharmacy	4,837.90
Lutheran Lay Fellowship	855.00
United Lutheran Appeal	2,927.54

## Business/Community

Alpha Security	1,000.00
King & Nordlinger	250.00
Linda's Ballet Workshop	100.00
Lutheran Trust	100.00

## Matching

Freddie Mac	200.00
Quadel Consulting	825.00
Thrivent for Lutherans	2,100.00

## Grants

The Closet of the Greater Herndon Area	2,000.00
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## United Way/CFC

1353.90

## In-Kind Donations

Accenture	Lord of Life Lutheran Church
Central Baptist Church	LSB Computer Services
Christ the King Lutheran Church	Lutheran Lay Fellowship
Civitans	McLean Bible Church
Donna Rich	Maryland State Representative Aisha Braveboy
Dorothy Banzon	Prince Georges County Fire Department
Evangel Cathedral	Prince Georges County Sheriff Department
Girl Scout Troop #1429	Prince Georges County Executive Jack Johnson
Girl Scout Troop #3200	Reston Interfaith
Good Shepherd Lutheran Church	Rev. Doug Jones & Robin Drummond
Gracen Fore	Riverdale Baptist Church
Herndon-Reston FISH	South Lakes High School Band
Heritage Fellowship Church	St. John Neuman Catholic Church
Holy Cross Lutheran Church	St. Matthew's Lutheran Church
Home Instead Senior Care	St. Thomas á Beckett Roman Catholic Church
Jericho Church	Steve Baker
Jim Kirby Photography	Theresa Rupp
Julie Hill	Tracey Shenk
Kathy Harmon	Trinity Temple
Lake Ridge Baptist Church	United Christian Parish
Lake Ridge Elderly Development Board of Directors	University of Maryland Community Band
Lake Ridge Rotary Club	Wegman's Food Market
Lenscrafters	

## 2010 Annual Awards

Congregation of the Year 2010	Central Baptist, Woodbridge, VA
Donor of the Year	Ms. Judith Koucky
Hunters Woods Volunteer of the Year	Mr. Mike Prompivish & Ms. Martha Loughead
Lake Anne Volunteer of the Year	Mr. Robert Thompson
Lake Ridge Volunteer of the Year	Mr. Bob Crawford
Largo Landing Volunteer of the Year	Carter United Methodist Men's Choir



# Fellowship Square Foundation Staff List

## Lake Anne Fellowship House

Louneta Beckles	<i>Administrator</i>
Michael Champ	<i>Maintenance</i>
Cristian Mata	<i>Janitorial</i>
Dennis Smith	<i>Maintenance</i>
Jenny Wang	<i>Bookkeeper</i>
Constance Welcome	<i>Clerical</i>
Nancy Whisler	<i>Resident Service Coordinator</i>

### In Memoriam

Fazal "Jeff" Janjua  
*Office Assistant*

## Hunters Woods Fellowship House

Luis Conde-Lopez	<i>Administrator</i>
Mihaela Burdubus	<i>Asst Administrator</i>
Richard Tracy	<i>Maintenance Supervisor</i>
Maria Benitez	<i>Homemaker Aide</i>
Clarence Butler	<i>Maintenance</i>
Walter "Jack" Donald	<i>Evening Receptionist</i>
Norma Ferman	<i>Rental Assistant</i>
Andrew Johnson	<i>Maintenance</i>
Florence Martey	<i>Evening Receptionist</i>
Nat Nguyen	<i>Bus Driver</i>
Ana Rivera Elias	<i>Housekeeping</i>
Hiroshi Shinoda	<i>Bookkeeper</i>
Rosa Tejada	<i>Homemaker Aide</i>
Natalia Tolmachova	<i>Receptionist</i>
Mary Beth Michael	<i>Resident Service Coordinator</i>

## Lake Ridge Fellowship House

Susan Bickell	<i>Administrator</i>
Sonia Ellis	<i>Asst Administrator</i>
John Dean	<i>Maintenance Supervisor</i>
Michael George	<i>Maintenance</i>
Julia Montecara	<i>Homemaker Aide</i>
Amber Elsey	<i>Receptionist</i>
Stephanie Tong	<i>Bus Driver</i>
Kathleen Harding	<i>Resident Service Coordinator</i>

## Largo Landing Fellowship House

David Digby	<i>Administrator</i>
Linda Williams	<i>Asst Administrator</i>
Nicholas Green	<i>Maintenance Supervisor</i>
Eugene Fletcher	<i>Bus Driver</i>
David Harvin	<i>Maintenance</i>
Angela Jones	<i>Bookkeeper</i>
Lynda Thomas	<i>Resident Service Coordinator</i>

## Administration

James Garrett	<i>Executive Director</i>
Kelly Amorin	<i>Director of Accounting &amp; Operations</i>
Sanda Voicescu	<i>Accounts Payable Supervisor</i>
James Johnston	<i>Accounting</i>
Rev. Faye Codding	<i>Community Outreach Coordinator</i>
Rev. David G. Berg	<i>Chaplain</i>



## **Fellowship Square**

**Foundation, Inc.**  
*50* Years of Caring 1960-2010

250 Exchange Place, Suite G ■ Herndon, VA 20170  
Tel: 703.471.5370 ■ Fax: 703.471.9895 ■ [www.fellowshipsquare.org](http://www.fellowshipsquare.org)