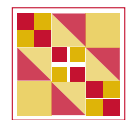


2019

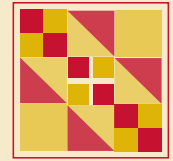
Annual Report



Fellowship Square
www.fellowshipsquare.org



Celebrating 55 years of dedicated service to low-income seniors and persons with disabilities, our Fellowship Houses are supported by many community partners. Because of you, our unique Fellowship Houses have the opportunity to have lively, meaningful, supportive, spiritual and affordable community life together.



Fellowship Square

Annual Report | 2016

Table of Contents

03	A Note from the President
04	Lake Anne Redevelopment Plan
05	Hunters Woods Fellowship House
06	Lake Anne I & II Fellowship House
07	Lake Ridge Fellowship House
08	Largo Landing Fellowship House
09	The Wegener Chaplaincy
10-12	Financial Portrait for 2015
13-14	Financial Partners (Donor list)
15	Board Lists

Fellowship Square, a faith-based, nonprofit organization, advocates for and provides safe, secure, and affordable homes and an array of supportive services for a diverse population of low income seniors and persons with disabilities.



Fellowship Square

A Note from the President

It is my pleasure to report on some of the important events that have transpired over the past year, in addition to the initiatives that the Board of Directors have tirelessly worked on to position for near-term implementation. These initiatives are set to further enhance the resident experience at our Fellowship Houses as we build a “Foundation for the Future.”

Over the past several years, I have called upon the Board of Directors to analyze each organizational component of the Foundation to determine the viability and necessity of each entity, as well as the inherent value and contribution to our mission. We examined the strengths, weaknesses, opportunities and threats that were evident throughout the Foundation, and developed an appropriate strategy that would create a solid foundation upon which to modify and/or build additional programs.

We embraced an exciting partnership opportunity with Jill Norcross of Jill Norcross Consulting, LLC. Jill is a strategic planning consultant with 15 years’ experience in the affordable housing industry. She specializes in affordable housing policy, asset management, project management, advocacy and technical assistance with particular emphasis in working with non-profit organizations. She is assisting the Board with many initiatives, particularly in organizing and facilitating a Strategic Planning Retreat for the Board in May.

In January of 2016, Fellowship Square Foundation (FSF) entered into an Agreement of Sale with Long Land Company, LLC to facilitate the sale of our twenty acres of undeveloped land in Berryville, Va. The purchase price is \$1,000,000 and the contract is subject to all routine study periods and rezoning procedures. The proceeds from the sale of this property is expected to materialize in approximately 18-24 months. This will go a long way in developing fundraising opportunities or other future initiatives as deemed appropriate.

In February of 2016, the Lake Anne Development Committee of FSF reviewed a proposal from the Community Preservation and Development Corporation (CPDC) regarding the exploration of development opportunities to preserve the affordability of the 240 units at Lake Anne Fellowship House. After an in-depth evaluation, the Board of Directors approved a motion for a single-phase redevelopment of the property. In the coming pages, you will learn more about this exciting venture.

I want to take this opportunity to thank our management agent, National Lutheran Communities & Services, for their outstanding support in the operations of our Fellowship Houses and corporate back-office support. Also, a big thank you to our House Administrators and their respective staff, our individual and corporate donors, and our Corporate and House Board of Directors who give so unselfishly of their time and talents to create a new foundation upon which to build the next legacy of Fellowship Square. Thank you for your continued prayers and support.

Chuck Wortman
Chairman



Lake Anne REDEVELOPMENT

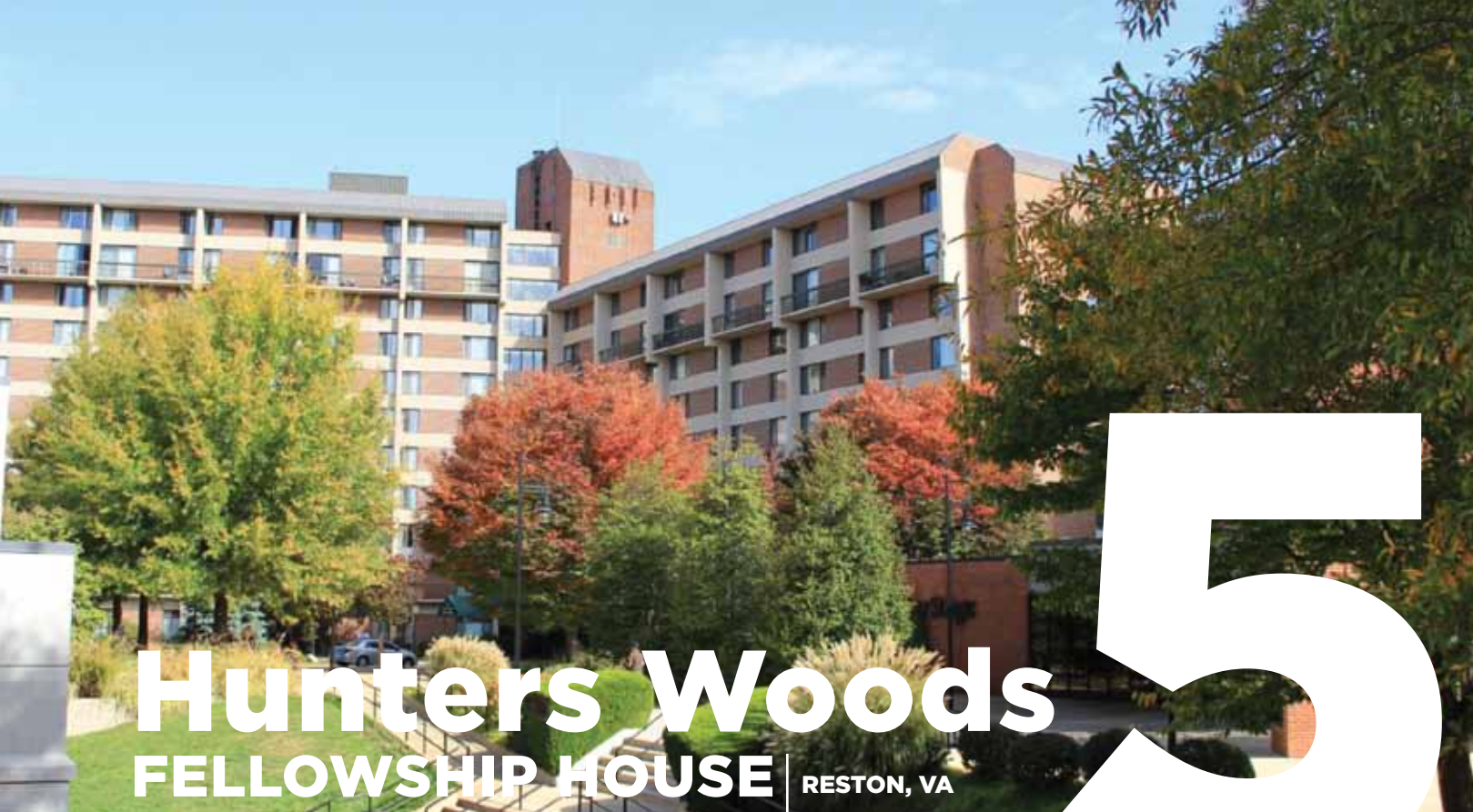
FSF has announced plans to redevelop the Lake Anne Fellowship House, which will replace all 240 apartment units and maintain long term affordability for low income seniors.

The decision follows an in-depth, five month evaluation of conditions at the property, conducted by Community Preservation and Development Corporation (CPDC), a regional not-for-profit developer of affordable housing. FSF entered into a Memorandum of Understanding with CPDC, dated July 30, 2015 for the exploration of development options for the Lake Anne campus. The following options were considered:

- Renovation of the existing building
- Construction of a replacement project on the existing site or elsewhere within close proximity
- Construction of a replacement project elsewhere

The Lake Anne Development Committee, spearheaded by Eddie Byrne and Renee Jakobs, reported to the Board of Directors that they concurred with the recommendation for a single-phase redevelopment of the property. The Board approved the motion with subsequent authorization for the Committee to negotiate a partnership agreement for the redevelopment and ongoing operation of the property by and between FSF and CPDC. The agreement will be brought back to the Board for final approval after all financial, legal and operational considerations have been negotiated.

Once an agreement is reached, the final planning and approvals for the project will proceed. Construction of the new building could be completed within three years.



Hunters Woods

FELLOWSHIP HOUSE | RESTON, VA



Lake Anne I-II

FELLOWSHIP HOUSE | RESTON, VA

The typical Hunters Woods resident is an 84-year-old, recently naturalized, Asian female, living on Supplemental Security Income. Her family helped her pay \$700 in fees to obtain U.S. citizenship. She receives support from family members for groceries and over-the-counter medications. After rent and medical expenses, she only has \$500 for the rest of the month. Even with family assistance, she cannot cover the rest of her expenses—laundry and cleaning supplies, transportation, toiletries, telephone, clothing, and more. Without your support, she will not be able to make ends meet.

A Healthy Focus

Hunters Woods' Housing Plus program expanded this year to include two physicians, a pharmacy and other health care professionals who come to our building for residents. They host weekly health seminars to help residents understand how they can best care for themselves. Because of this expansion, some of our residents' health has significantly improved. They are hospitalized less, take less medication and have fewer needs for transportation to outside medical facilities. These clinics help bring an expert pair of eyes for the residents care into our buildings.

5 languages routinely translated for resident communications

8 shopping carts purchased

102 assessments completed

301 referrals made

85 signs installed (property/no parking zone/fire lanes/etc.)

21 Transports made

15 Food deliveries made monthly

15 Safelink phones installed

Lake Anne I

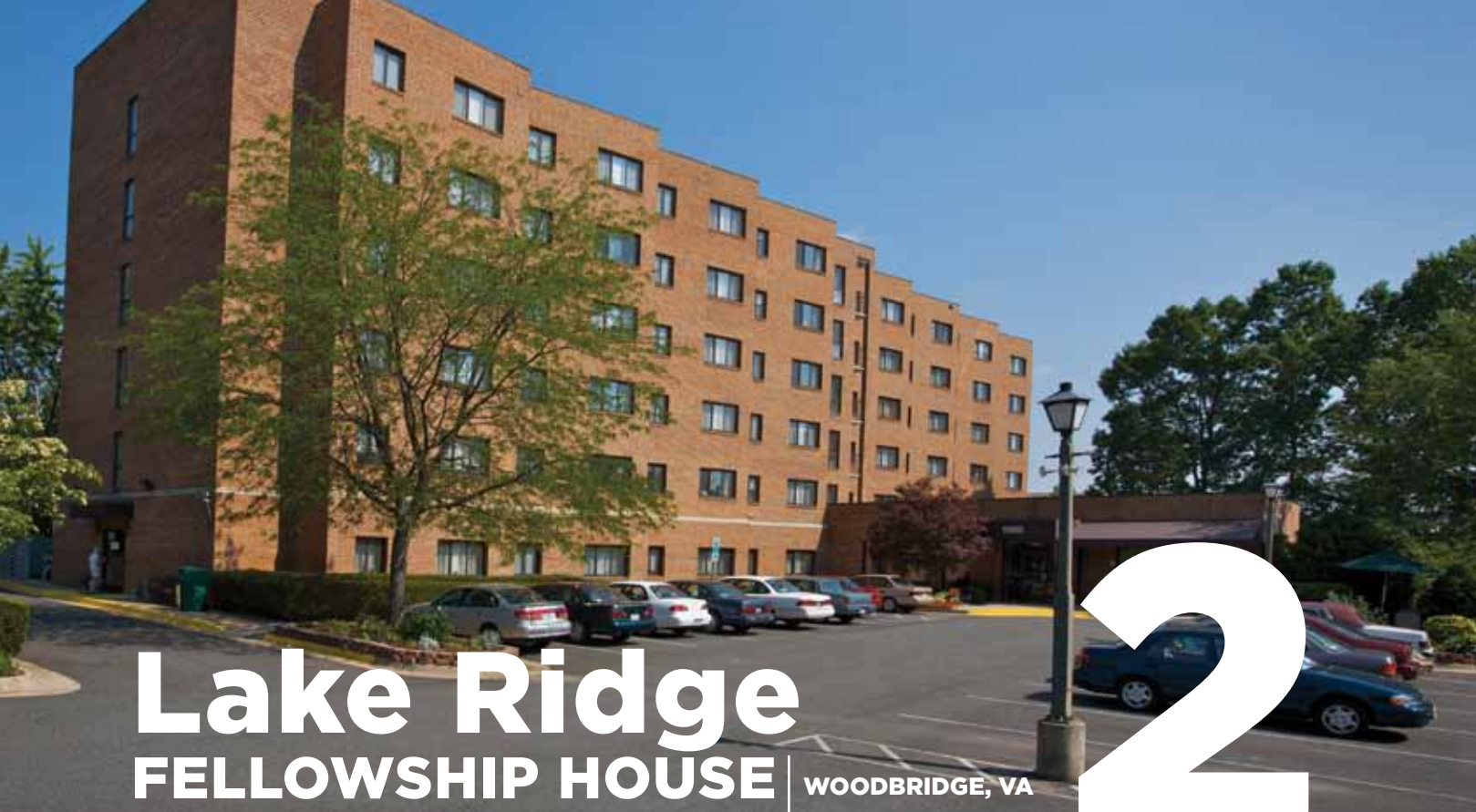
The typical Lake Anne I resident is a Caucasian female in her late 70's, living on Social Security. After rent and medical expenses, she has \$700 dollars for the rest of the month. She uses her credit cards to pay for her medications, and she depends on the local food pantry and gifts from area religious communities and businesses. Although no longer able to work and add to her income, she sometimes shares her limited resources with her 90-year-old neighbor. Without your gifts, she and her neighbor will not be able to make ends meet.

Lake Anne II

The typical Lake Anne II resident is a Caucasian female between age 70 and 79, living on Social Security. After rent and medical expenses, she has less than \$500 dollars for the rest of the month. She likely gets help from family or friends, and she relies on local food programs to eat. Her limited income can't cover all of her expenses—groceries, over the counter medications, laundry and cleaning supplies, transportation, toiletries, telephone, clothing, and more. Without your support, she will not be able to make ends meet.

A Social Partnership

For many of our residents their health is severely affected by isolation and boredom. Trapped by health concerns and transportation needs, scary nights and long days are prevailing. Lake Anne has a new bus and shares a driver with Hunters Woods Fellowship House, which allows residents to attend local events and shop at the grocery store. Donor dollars have helped to provide for trips to local community events and to the movies with other community seniors. Lake Anne gives thanks for programs like this that fulfill the mission and ministry of Fellowship Square.



Lake Ridge FELLOWSHIP HOUSE

WOODBIDGE, VA

2

hot water heaters and 1 boiler system replaced

The typical Lake Ridge resident is a Caucasian female, over age 75, who has lived in her apartment for seven years. She is a widow who survives on her late husband's Social Security and small pension. After rent and medical expenses, she has only \$800 for the rest of the month. While that amount may sound like enough to live on, it can't cover all of her expenses—groceries, over the counter medications, laundry and cleaning supplies, transportation, toiletries, telephone, clothing, and more. She sees a specialist in Fairfax City for a chronic medical condition. Transportation from Lake Ridge Fellowship House is expensive and difficult to find. Without your help, she will not be able to make ends meet.

A Helping Hand

Sometimes residents have to choose between their medication and food. Particularly at the end of the month when their funds run out. This is usually brought to light when a staff member urges the resident to speak to the Resident Service Coordinator (RSC) and describe her dilemma. The RSC was able to contact the pharmaceutical company and have the cost of her medications reduced by one-third. Now the resident is able to make ends meet and continue to live independently.

100

apartment windows replaced

236

health care services provided monthly

0

tax returns prepared

Largo Landing FELLOWSHIP HOUSE

LARGO, MD

1,500

shingles replaced on the main building and social hall

1951

windows replaced in social hall and common areas

educational seminars held

60

meals provided each month

The typical Largo Landing resident is an African American female in her 70's who may still be working. After rent and medical expenses, she has only \$700 for the rest of the month. Having held a job most of her life, she remains employed—but with health concerns. In order to work, she must maintain an automobile and a working woman's wardrobe. Her medications alone are double the cost of other seniors' and she still must pay for food, toiletries, telephone, and transportation. Without your support, she will not be able to make ends meet.

An Engaging Community

Sometimes people find it surprising that residents are an active part of the communities they live in. You can find them reading to children at the local elementary school, volunteering at the polls, or active at their local congregation. Often times residents deliver food that comes to Largo Landing Fellowship House to other residents who are home bound. They may check on residents each day or may be involved in planning activities or helping connect residents with staff about special needs. Simply put, they are an engaged and vibrant community that not only receives, but also gives.

The Wegener Chaplaincy



L to R: Rev. David L. Percy, Rev. Fred Klein

The focus of the chaplain's work is to provide a ministry of presence and care to all the residents of the Fellowship Houses. At their request, the chaplain provides spiritual counseling, Bible study, worship services, Holy Communion, visits to the sick, and a warm greeting to all the newcomers. It's a big job—a congregation of over 800 members—and our chaplain, Pastor Fred Klein, handles it well with many (45) years of experience as a parish pastor.

The chaplain's presence allows the residents time to share their interests, concerns and problems with someone they know and trust—someone who is different than their neighbor down the hallway and different from the administrator or staff person they may work with regularly. It doesn't have to be an emergency, it can be a little need, or just a desire to share, that makes a few minutes with the chaplain very important; someone who has a sympathetic ear and can offer advice and counsel while being assured of confidentiality. And when talking with Pastor Klein, they know they are talking to someone who cares.

Pastor Klein has established important priorities of caring. He has chosen to serve the sick as his first priority, visiting in their apartments, hospital, or rehab facilities. It doesn't make any difference whether you are a house resident, family member, staff member, volunteer who just happens to be present or the house administrator; in English or a dozen other languages spoken in our houses, and regardless of faith orientation, Pastor Klein serves all.

I think this must be close to what Pastor John Scherzer and Pastor William Wegener had in mind when they took their turn in starting and guiding us to what Fellowship Square has become. The roots of our Pastoral Care Program are growing in the good soil they helped till and prepare with their vision. I think I can go so far as to say, they would have been especially proud of this Chaplain.

This is the foundation from whence Fellowship Square will grow into the future. Ministry, the word, will continue to be important to the future of Fellowship Square. It needs to continue to be an identifier of who and what we are, what we are about and what we are doing. Ministry and pastoral care need to remain an important part of our Foundation for the Future. We thank you for your partnership in this and making the Pastoral Care Program a continued reality.

Rev. David L. Percy
Pastor Care Committee

Financials

July 1, 2014 - June 30, 2015

Fellowship Square Foundation Gift Fund Statement of Activity

Revenue

5.54100	Financial Revenue Operation	4,285.00
5.59970	Contributions - Restricted	15,506.00
5.99990	Contributions - Unrestricted	44,185.00

Total Revenue **\$63,976.00**

Expenditures

5.62100	Advertising and Marketing	5,702.00
5.63100	Office Wages	40,054.00
5.63110	Office Expense	4,890.00
5.63300	Manager Salary	2,800.00
5.63500	Audit Expense	1,064.00
5.63900	Misc. Administrative Expenses	5,774.00
5.65900	Misc. Operating & Maintenance	3,340.00
5.67100	Real Estate Tax-Berryville	20,145.00
5.68900	Misc. Financial Expense	414.00
5.69000	Elderly & Congregate Svc. Exp.	37,276.00

Total Expenditures **\$121,459.00**



Over 30 religious organizations bring support to our Fellowship Houses by providing food, activities, and monetary donations that support the chaplaincy and residents of Fellowship Square.

FINANCIALS cont'd.

Fellowship Square Consolidated Income and Expense

Revenue	Consolidated	Hunter Woods	Lake Ridge	Largo Landing	Lake Anne I	Lake Anne II
Net Rental Revenue	8,243,542.00	3,215,047.00	1,489,975.00	1,810,368.00	915,979.00	812,173.00
Elderly Care revenue	153,100.00	27,902.00	48,383.00	45,104.00	18,383.00	13,328.00
Financial Revenue	5,368.00	3,334.00	371.00	422.00	465.00	776.00
Other Revenue	275,150.00	36,947.00	11,590.00	6,303.00	54,782.00	165,528.00
Donations	0	0	0	0	0	0
Total Revenue	\$8,677,160.00	\$3,283,230.00	\$1,550,319.00	\$1,862,197.00	\$989,609.00	\$991,805.00

Expense Summary

Revenue	Consolidated	Hunter Woods	Lake Ridge	Largo Landing	Lake Anne I	Lake Anne II
Administrative Expense	1,795,891.00	519,976.00	333,122.00	408,250.00	306,014.00	228,529.00
Utilities Expense	998,080.00	321,747.00	129,324.00	203,531.00	196,215.00	147,263.00
Operating and Maintenance Expense	1,907,687.00	587,160.00	335,591.00	413,779.00	333,694.00	237,463.00
Taxes and Insurance	854,432.00	294,570.00	115,171.00	268,224.00	106,986.00	69,481.00
Financial Expense	1,058,052.00	245,000.00	308,306.00	339,208.00	62,352.00	103,186.00
Eldercare Expense	367,535.00	150,854.00	77,835.00	66,092.00	41,638.00	31,116.00
Depreciation and Amortization	1,030,096.00	344,551.00	175,023.00	218,213.00	165,272.00	127,037.00
Developer Fee	380,430.00	0	380,430.00	0	0	0
Total Expense	\$8,392,203.00	\$2,463,858.00	\$1,854,802.00	\$1,917,297.00	\$1,212,171.00	\$944,075.00

Fellowship Square relies on the generous support of family, friends, congregations, and others to ensure the residents are supported. This takes the form of financial gifts, gifts in-kind, and volunteer opportunities.



Financial Partners

January 1, 2015 – December 31, 2015

Individual Donors

Insuring the Future - \$5,000 - \$9,999

Charles Wortman

Encouraging Independence - \$1,000 - \$4,999

Walter Belter

Eddie Byrne

David & Barbara Carr

Richard Christensen

Betty Fredericks

Chris Griffin & Don Owens

C. David & Ladonna Hartmann

Paul Hill & Prabha Iyer

Judith Koucky

Mary Schmidt

Building Community - \$500 - \$999

Jorn Dalboe & Sarah Leonard

George Davies

Rev. Douglas Jones

Jennifer Maloney

Rev. Larry Schmidt

Erin Williams

Zoe Parker

Providing Shelter - \$100 - \$499

Rev. Faye R. Codding

John & Mary Corkill

Steve & Beth Disilvio

Richard Douglas

Beverley Gardner

Marjorie Glass

Beth High

Rev. Ivan Ives

Lynette Jacob

Sidney & Dale Johnson

Rev. Fred & Elizabeth Klein

Vernon Krueger

David & Deborah Lambert

John Mahlmann

Raymond Meyer

Myra & Paul Niemeier

Anita Nolen

Samuel Oliver

Bruce Randall

Rev. Richard & Melba Reichard

Maurice & Rev. Suzanne Rudiselle

Judith B. Rudolf

Terri Siggins

Susan Simon

Craig & Patricia Swanson

John Thillman

Amelia Titzman

Helen Vigness

Lev Volftsun

Sondra Williams

Kerrie Wilson

Larry & Susan Zimmerman

Giving Hope - \$99 and below

Sandy Amato

Ludwig Benner Jr.

Alice Benson & Kirk Fitch

Dolores Cascio

Bobby Crawford

Dara Dirth

Evelyn Emsinger

Kimberly Falatic

Richard & Dorothy Finger

Renee Jakobs

Sidney Johnson

Dorothy Kelsey

Wallace & Katherine Knutsen

Ginny Lee

Cristina Lewandowski

Said Maqsodi

Adrian Pelzner

Lee & Janice Rau

Yvonne Reese

Thomas Scott

Laura Seal

Peter & Patricia Shaulis

A Ferrin Simmons

Alfred Ulvog Jr.

Allen Wild

Planned Gifts

Gordon M. Odegaard

Frederick M. Rabel

Tribute Gifts

Bull Run Chapter, Thrivent Financial *in honor of Victor Evans*

Susan Simon *in honor of Pat Williams*

Kerrie Wilson *in honor of Hunter Woods*

Coalition

Thrivent Financial

Linda Cook

Cynthia Medvick

John McCoy

Dr. Paul & Dr. Myra Niemeier

Rev. David Pearcy

Anne Siler

Congregations

All Dulles Area Muslim Society

(ADAMS), Sterling, VA

Bethlehem Lutheran Church, Fairfax, VA

Carter's Methodist Church, Friendship, MD

Chantilly Bible Church

Christ the King Lutheran Church, Great Falls, VA

Christ the Servant Lutheran Church, Reston, VA

Congregation Olam Tikvah, Fairfax, VA

Divine Peace Lutheran Church & School,

Largo, MD

Emmanuel Lutheran Church, Vienna, VA

Epiphany Lutheran Church, Dale City, VA

Evangel Cathedral, Upper Marlboro, MD

First Baptist Church of Highland Park,

Landover, MD

Gethsemane Baptist Church, Mitchellville, MD

Good Shepherd Lutheran Church, Herndon, VA

Grace Christian Church, Herndon, VA

Grace Lutheran Church, Woodbridge, VA

Heaven's Helpers Ministry, Landover, MD

Holy Cross Lutheran Church, Herndon, VA

McLean Bible Church, McLean, VA

NOVA Hebrew Congregation, Reston VA

Prince of Peace Lutheran Church,

Gaithersburg, MD

Riverdale Baptist Church, Upper Marlboro, MD

St. Anne's Episcopal Church, Reston, VA

St. John Neumann Catholic Church, Reston, VA

St. Matthew's Lutheran Church,

Woodbridge, VA

St. Michael's Truth Lutheran Church,

Mitchellville, MD

St. Paul's Lutheran Church, Falls Church, VA

St. Thomas à Becket Catholic Church,

Reston, VA

United Christian Parish, Reston, VA

Zoe Ministries, Capitol Heights, MD

Religious Organizations

Bless My People Foundation

Bull Run Chapter, Thrivent Financial

Dulles Chapter, Thrivent Financial

Gifts of Hope

Knights of Columbus Family

of Man Council 7566

Lutheran Lay Fellowship

The Lydians of Agustana Lutheran Church

Business/Corporations

Alpha Security

American Combustion Industries

ATT Mobility/Bechtel

Dr. Zhou's Clinic

GraceFul Care

Home Depot

Kolb Electric

Linda's Ballet Workshop

Thrive at Home

ValleyCrest Landscaping

In-Kind Donations

Melanie Bush

Miatta Caine

Carole Ghrist

Dorothy Hall

Bruce & Mary Harding

Donald Leas

Janis & Michael Miller

Yeon Nam

Ruth Natter

Lenore Stewart

Non-Profits and Community In-Kind Donations

Buzz Aldrin Elementary School

Cornerstones

Herndon-Reston FISH

Hunters Woods Elementary School

2016 Annual Awards

Donor of the Year

Charles R. Wortman

Religious Organization of the Year

Holy Cross, Herndon, VA

Corporation of the Year

GraceFul Care

Hunters Woods Volunteer of the Year

Gail Schlett

Lake Anne Volunteer of the Year

Ted Finn and Casey Folga

Lake Ridge Volunteer of the Year

Carmella Ciemny

Largo Landing Volunteer of the Year

Rev. Emanuel Williams

2016

Board of Directors



"No more lonely days and no more scary nights," shared a resident about how she feels about moving into her new apartment at FSF.

Contact

Board of Directors

President, Chuck Wortman
Vice President, Rev. Dave Pearcy
Treasurer, Jennifer Maloney
Secretary, Dr. C. David Hartmann
Eddie Byrne
Mike Collins
Dan Flavin
Bryan Isler
Carl Jenkins
Doug Jones
Vern Krueger
Joan Loesch
Renee Jakobs
Rev. Suzanne Rudiselle

House Board of Directors

Hunters Woods

Elderly Development Board of Directors

President, Jorn Dalboe
Vice President, Shirley Metzger
Treasurer/Secretary, Sidney Johnson
Jo-Anne Duggan
Lynette Jacob
Rev. Suzanne Rudiselle
Adrian Pelzner
Allen Wild

Lake Ridge

Elderly Development Board of Directors

President, Beth High
Vice President, Kenji Brown
Secretary, Victor Evans
Treasurer, Rev. Brandon Johns
Jana Justan
Rev. Bob Allard
John Gray
Joan Loesch

Largo Landing

Elderly Development Board of Directors

President, Vernon Kreuger
Advisor, John Corkill Jr.
Treasurer, John Priebe
Secretary, Ginny Lee
Morris Hymes
Judy Rudolph
Mary Wilmoth
Phillip Woodruff

Lake Anne

Elderly Development Board of Directors

President, Ed Byrne
Secretary, Lynette Jacob
Henry Chow
Tony Esse
Kam Flynn
Farid Sadrzadeh
Lenore Stewart
Bob Thompson
Marilyn Voigt



Hunters Woods

Fellowship House

2231 Colts Neck Road | Reston, VA 20191
Tel: 703.860.2536 | Fax: 703.716.4480

Lake Anne

Fellowship House

11450 North Shore Drive | Reston, VA 20190
Tel: 703.471.6474 | Fax: 703.834.0671

Lake Ridge

Fellowship House

12800 Harbor Drive | Woodbridge, VA 22192
Tel: 703.494.5337 | Fax: 703.494.2465

Largo Landing

Fellowship House

1077 Largo Road | Upper Marlboro, MD 20774
Tel: 301.249.2100 | Fax: 301.249.1375

www.fellowshipsquare.org

FSF provides emergency funds to our neediest residents bringing a smile to those who need it the most.



EQUAL HOUSING OPPORTUNITY

www.fellowshipsquare.org

Fellowship Square Foundation

2231 Colts Neck Road | Reston, VA 20191

Tel: 703.860.2536 | Fax: 703.716.4480

