

— F O U N D A T I O N —  
**Annual Report**

2015-2016

*Collington*

A KENDAL<sup>®</sup>  
AFFILIATE

*Together, transforming  
the experience of aging.®*



A report on charitable giving at Collington.



Dear Friends,

Collington Life Care Community and The Collington Foundation, the 501(c)(3) non-profit corporation that supports Collington, are proud to present this report on our philanthropic activities. You will learn more about the various funds benefiting our community and what we were able to accomplish thanks to the generosity of our residents, friends and staff.

Thank you to everyone who made a gift to support Collington between 2015 and 2016. Charitable giving totaled \$258,672 with 444 gifts from 247 households in 2015. In 2016, charitable giving totaled \$96,488 with 258 gifts from 157 households. Gifts were made using checks, credit cards, charitable gift annuities, pooled income funds and bequests. Donations were made in memory of deceased residents and to honor residents' and staff members' birthdays and anniversaries.

Philanthropy is a big part of what makes Collington such a great place to live and work. Thanks to all of you who gave so generously in 2015 and 2016.

Alphonse Brown  
Collington Foundation Board Chair

Marvell Adams  
Collington Executive Director

Collington Foundation Funds	Balance as of	
	12/31/2015	12/31/2016

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**Cash Balance by Fund**

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Fellowship Fund	\$2,212,442	\$2,476,411
Scholarship Fund	80,988	50,565
Music Fund	17,181	19,283
Future Fund	17,773	17,329
Unrestricted Funds	401,897	246,568
<b>Total Cash Balance</b>	<b>\$2,730,281</b>	<b>\$2,810,156</b>

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**Other Assets**

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Note Receivable (from Collington - CELCC)	\$1,300,000	\$1,300,000
Interest Receivable	601,745	643,996
<b>Total Note plus Interest</b>	<b>\$1,901,745</b>	<b>\$1,943,996</b>

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**Administrative Expenses**

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Staff*	\$ 48,080	\$49,527
Fundraising	8,273	18,059
Miscellaneous	3,653	1,220
<b>Total Admin Expenses</b>	<b>\$60,006</b>	<b>\$68,806</b>

\*Staff expenses only include the salary of the Director of Philanthropy. Collington does not charge the Foundation for benefits such as health insurance, retirement plan, etc. Additionally, Collington does not charge the Foundation for expenses related to the Foundation President, Chief Financial Officer or other administrative support.

A copy of the current financial statement of The Collington Foundation is available by writing to The Collington Foundation at 10450 Lottsford Road, Mitchellville, or by calling 301-925-7682. Documents and information submitted under the Maryland Solicitations Act are also available from the Maryland Secretary of State, state House, Annapolis MD 21401.



# Philanthropy at Collington

Philanthropy has played a key role in the development of Collington from the start. Those involved in establishing the Collington community set a tone of generosity — of spirit, of time, of talent, and of resources.

The Collington story began with a gift when Homer Gudelsky donated the land on which Collington is located. This spirit of generosity continues to characterize life in Collington through gifts that have made possible financial assistance for residents, scholarships for students, and improvements in our community.

The Collington Foundation, Inc. is the philanthropic arm of Collington Episcopal Life Care Community. The Foundation is the tax-exempt entity entrusted with the management and disposition of funds donated by residents and other generous contributors. Its purpose is to serve the Collington community—residents and employees—where specific needs exist. The Foundation occasionally provides capital funds for projects that enjoy community support. The basis of this activity is grounded in a tradition of generous support initiated by our founding residents.

The Foundation is managed by a Board of Directors comprised of Collington residents and directors of Collington Episcopal Life Care Community as well as members of the community. Directors may serve for two (2) three-year terms, and at least two members of the Collington Foundation Board of Directors must also serve on the Collington Board of Directors. The Foundation is an IRS approved 501 (c) (3) non-profit charity, and donations to the Foundation are tax-exempt to the extent allowable by law. The Foundation maintains a current registration with the Maryland Secretary of State. The Foundation administers several funds.

**2015-2016**

## Collington Foundation Board of Directors

### Resident Directors

Sara Case  
Ted Hawkins  
Frances Kolarek\*  
Helen Lauck  
Mike McCulley  
George Newman  
Anne Stone

### Community Member Directors

Alphonse Brown  
Mary Frances Bruce  
Paul Cooney  
Annetha Hall  
Mary Kirkeby  
Theresa Poussaint\*  
Chris Rauch

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\*Term ended 2015

Foundation Board Committees: Finance, Scholarship & Event Planning

Board members serve up to two 3-year terms and currently half of the members are residents and the other half non-residents. Additionally, the bylaws of the Foundation denote that the two members be selected from the current membership of the Collington Corporate Board.



# Our Funds

## **Fellowship Fund**

Thanks to generous donors to the Foundation, Collington can offer residents the assurance that they will be able to remain here, even if their finances are depleted through no fault of their own.

In 1984, the Episcopal Diocese of Washington granted Collington \$250,000 to start a Fellowship Fund to underwrite all or part of the monthly fees for residents who are no longer able to pay their monthly fees. The Fellowship Fund operates as a quasi-endowment fund with the principal of the fund retained and invested, rather than expended. Interest on the principal held in the Fellowship Fund is used to provide assistance to residents. Thanks to support from generous contributions to the Fellowship Fund, Collington has never asked a resident to leave because they can no longer pay their monthly fees.

A resident seeking assistance from the Fellowship Fund contacts Collington's Executive Director or Chief Financial Officer, who works with the resident to determine the level of need. The identity of those seeking assistance is held in strictest confidence, and the Foundation's Financial Assistance Committee, which makes the final decisions, is composed entirely of non-residents

The Fellowship Fund provided assistance to nine (9) residents in Independent Living and Assisted Living in 2015 at a cost of \$164,543. Donations to the Fellowship Fund totaled \$14,430 in 2015. In 2016, the Fund provided assistance to nine (9) residents at a cost of \$159,582 with donations for the year totaling \$26,780.

## **Scholarship Fund**

The Scholarship Fund was created in 2001 by the Collington Foundation Board of Directors. This fund provides financial assistance to employees to enable them to enhance their job skills and level of education, thereby improving employee job satisfaction and increasing retention of qualified employees. A Scholarship Committee of residents and staff members reviews scholarship applications several times a year and makes awards based on employees' needs.

Forty-two (42) scholarship awards totaling \$58,961 were made in 2015. The average award was \$1,404. Donations to the Scholarship Fund totaled \$60,476 in 2015. In 2016 twenty-eight (28) awards were given totaling \$38,700 with an average award of \$1,382 and donations for the year totaling \$16,660.



### **Music Fund**

The Music Fund was established in early 2013 when a group of residents saw the need for a new piano in the Ivy Room and decided to raise funds to purchase a piano. Later in 2013, another group of residents approached The Foundation with a request to facilitate a self-supporting series of musical performances called the Candlelight Concert Series. The Foundation supports the Series by collecting donations specifically for the concerts and arranging for payments to the performers.

Four concerts were held in 2015 at a cost of \$4,538. Donations to the Music Fund totaled \$7,000. Three concerts were held in 2016 at a cost of \$2,510 and donations for the year totaled \$6,830 to the Fund.

### **Future Fund**

The Future Fund was created in 2013 to commemorate Collington's 25th anniversary. It funds projects that support the general needs of Collington. Donations of \$850 and \$75 were made to the Future Fund in 2015 and 2016, respectively. The Future Fund had a balance of \$17,329 on December 31, 2016. No funds were expended during 2015 or 2016.

### **Unrestricted Funds**

Any donations that are not designated for a specific purpose are placed in an unrestricted fund. These funds may be used at the discretion of the Foundation Board of Directors. There was a balance of \$246,578 in unrestricted funds on December 31, 2016.

The Foundation Board used Unrestricted Funds for project grants that had broad support from residents in 2015 and 2016. Some of those projects included, automated doors installed in the apartment building utility rooms at a cost of \$16,543 and landscaping improvements were made throughout the campus at a cost of \$15,000. Previous grants paid for automated doors for the Auditorium and some restrooms, and some earlier landscaping. Unrestricted gifts totaled \$175,917 and \$42,568 in 2015 and 2016, respectively.

# Learn More

For more information, please contact Marvell Adams, Executive Director.

## **How to Make a Gift**

Gifts can be made by check payable to The Collington Foundation and mailed to 10450 Lottsford Road, Mitchellville, MD 20721 or dropped off at the Clocktower. You can make a gift to Collington using a credit card online by going to [Collington.Kendal.org](http://Collington.Kendal.org).





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