

The Collington Foundation

2022 Charitable Giving Report

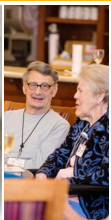
Collington
A KENDAL AFFILIATE



communication



collaboration



sustainability



Providing and Inspiring Philanthropic Support for the Collington Life Plan Community.



September 2023



Dear Friends of The Collington Foundation,

Thank you for investing in our work for another year of serving the Collington community. Because of the generosity of resident David Fry, a renowned artist and professional woodturner, we held our first major public event in May. "From Bole to Bowl" was our gala and art sale featuring over 50 magnificent wooden bowls and vessels made and donated by David Fry to benefit the Collington Foundation. It was a festive occasion, bringing the community together in a way that had not been possible during the pandemic.

The event kicked off the Annual Fund Campaign which raised over \$140,000 to fund much-needed work to reduce the noise level in the main dining room for an improved dining experience. Your support provided resources for scholarships, resident-led projects such as the Electric Vehicle Charging Stations, Fellowship subsidies which allow our neighbors to continue to live at Collington, as well as outreach to our friends and neighbors in Prince George's County.

The major focus in 2022 was communication, collaboration, and sustainability. We spoke at meetings in every district and at monthly Resident Association meetings. We revised the bylaws and posted them in the library and on the Resident Association website. The Leadership Development Committee held an open Zoom session to educate the community about the Foundation, explaining its history, its mission and vision, and its many projects. The Foundation, together with the Administration, worked to revise and update the policies for applying to the Fellowship Fund, to make the process more accessible and user-friendly and placed application materials in the Clock Tower and online. In short, we worked to shine a light on the Foundation with a commitment to transparency and collaboration to meet the collective needs of our beloved community.

After a long stretch without a Director of Philanthropy on Collington's staff, Paige Mills-Haag joined us in mid-March. Her vast experience in all aspects of philanthropy, her extensive background at another Life Plan Community and her buoyant good spirits brought the Foundation a welcome professional partner.

It was a busy year and laid the groundwork for more transformational work in the future. Most important, none of it would have been possible without the generosity and support of Collington's residents and friends. We thank you from the bottom of our hearts.

With gratitude,

Bonnie Cronin, Chair
The Collington Foundation

Ann Gillespie, CEO
Collington & President
The Collington Foundation

The Collington Foundation Overview

Philanthropy is at the heart of our Collington community, with the seeds of the Foundation planted as shovels were going into the ground to build our homes and rooted in generosity of spirit and the sharing of our time, talents, expertise, and resources.

Our greatest strength lies in our mutual commitment to communication, education, and sustainability for all those who live and work at Collington. We value our collaboration with the generous contributors and our partners and neighbors, the Prince George's County schools, colleges, and universities who help build a legacy and solid foundation on which we continue to grow. Together we will ensure Collington will be home to countless generations for decades to come.

The Collington Foundation is a 501(c)(3) nonprofit organization, founded in 1996 as the philanthropic arm of Collington Life Plan Community to provide for the programs and services of our residential retirement community. Our commitment has remained consistent over the decades -- to serve all constituents -- Collington residents, families, team members, board members, volunteers, and the broader community as it aligns with our mission. We meet our mission through disbursements from the Fellowship Fund, the Scholarship Fund, and the Annual Fund. Special projects that enhance or improve the lives of residents and team members and the Collington community remain at the forefront of our mission.

The Foundation is governed by a Board of Directors comprised of Collington residents as well as non-resident members who display exemplary leadership in the broader community. Two Collington Board of Directors also serve on the Collington Foundation Board. Foundation assets are managed professionally with oversight from the Finance and Executive committees of the Foundation Board.

Contributions to the Collington Foundation are tax deductible as allowed by law. Your support strengthens our mission of service to those who call Collington home.

The Collington Foundation Board of Directors — 2022

OFFICERS

Bonnie Cronin, *Chair*
Ann Gillespie, *President*
Amy Castleberry, *Treasurer*
Adele Miller, *Secretary*

MEMBERS

Alexis Allen-Shorter
Peter Basquin
Sue Blanchette
Charlie Clapper
Nadine Hathaway

Patricia Jones
Paul King
Rosalind Muchiri
Adam Osteryoung
Sue Regen
Henry Thomas
Pat Zelman



2022 Collington Foundation Board of Directors. (From left to right) Front Row: Sue Regen, Pat Jones, Bonnie Cronin, Ann Gillespie, Pat Zelman, Rosalind Muchiri, and Sue Blanchette. Back Row: Peter Basquin, Henry Thomas, Adam Osteryoung. Not Listed: Charlie Clapper, Adele Miller, Amy Castleberry, Alexis Allen-Shorter, Nadine Hathaway and Paul King.

Fund Descriptions

The Collington Foundation's mission is to *provide and inspire philanthropic support for the Collington Life Plan Community*. To achieve this, the Foundation stewards several funds from which grants are made for projects proposed by residents or Collington team members. The grants must benefit the needs of the broader Collington community and receive the support of both residents and Collington management.

Fellowship Fund

The Fellowship Fund was established in 1984 with a gift of \$250,000 from the Episcopal Diocese of Washington to encourage diversity, including economic diversity, among the residents and to assure that residents would be able to remain in the community, even if their resources are depleted through no fault of their own. The principal of this endowed fund is retained and invested; earnings are used to provide financial assistance to residents, who, through no fault of their own, require financial support to stay at Collington.

Decisions on granting subsidies are based on Collington's policies as outlined in the Residents Agreement and are made by a committee consisting of a non-resident Foundation Board member, Collington's CEO, and the Chair of the Collington Board or his/her designee. The identities of residents receiving subsidies remain in strict confidence.

In 2022, The Fellowship Fund received \$71,932 in contributions and provided \$161,656 in assistance to 10 residents.

Scholarship Fund

The Scholarship Fund was established to provide tuition assistance to team members who wish to pursue their education or professional certifications in their desired field of study. A Scholarship Advisory Committee comprised of residents, reviews applications several times a year, meets with applicants, and recommends grant awards which are submitted to the Foundation's Awards Committee for approval.

In December 2021, the Foundation established the Fofana Scholarship Fund in honor of a beloved team member, John Fofana, who had received several scholarships from the Foundation and was tragically killed in a car accident. The Foundation donated \$15,000 in seed money and invited residents, friends, and team members to match that amount. The first-ever Fofana Scholarship was granted to a deserving team member, Diana Berrios, in 2022.

In 2022, the Scholarship Fund awarded a total of 15 scholarships in the amount of \$27,298 and received \$39,601 in contributions.

Annual Fund — Unrestricted

Gifts to the Annual Fund give the Foundation the flexibility to respond to community needs both on-campus and among our neighbors in Prince George's County. The Fund also supports the operational expenses of the Foundation. In 2022, the Annual Fund received \$91,076 in contributions and awarded almost \$74,000 in grants for resident-led projects and outreach to our neighbors.



Impact of Investment in the Foundation

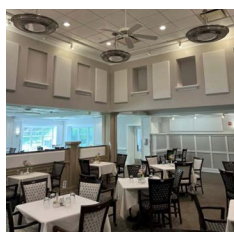
Accessible Picnic Table (Resident Grant)



The ADA picnic table is in Collington's Arbor Garden for neighbors, team members and families to enjoy. The open space in seating will accommodate a wheelchair, walker or another chair and the table is a great place to share a meal. The grant in the amount of \$1,113.52 was awarded to a committee, Friends of the Creighton Center, to benefit the entire community.

Photo credit: Ann Marie Rahn

Main Dining Room Sound Reduction Project (Administration Grant)



The Sound Reduction Project in Collington's Main Dining Room significantly reduced noise, thanks to the installation of new sound clouds, halos, and wall panels throughout the dining room. This resulted in improved hearing and a better dining experience for everyone. A collaborative project, the Foundation, the Residents Association, and the Administration contributed \$5,000 each and the residents donated \$26,000, for a total of \$41,000 to make this valuable enhancement to our campus possible.





Pictured is Collington Resident, Mike Burke, Chair, Collington Climate Action Committee.



Electric Vehicle Charging Stations (Special Collaboration)

Three EV Charging Stations were installed on Collington's campus demonstrating Collington's commitment to sustainability and the environment. Another great collaboration, this was a special project of the Collington Foundation, in partnership with Collington's Climate Action Committee and Chair, Mike Burke, Collington Administration, Collington Residents Association, PEPCO Rebate Programs, Warfel Construction, and private donors who all helped to make this project possible. The Foundation raised over \$56,000 and received nearly \$42,000 in rebates for this project to come in under budget.

Scholarships Offer Career Advancement and Professional Development

One of the Foundation's most popular programs is the Scholarship Fund. The opportunity to support Collington team members who choose Collington as their work family, and with whom residents interact every day, unleashes a powerful impulse to generosity. From grant amounts as low as \$299 and as high as \$6,000, the Foundation has helped team members pursue everything from their first-ever college course to professional certifications, to a doctorate degree. The Foundation was pleased to support the following team members with a scholarship(s) in 2022 to achieve their educational goals:

Alice Ehnzele
Nelson Mirafior
Corinne Pearce
Emelda Che
Melina Acero
Vionna Carson

Nyles Keys
Adejumoke Sanni
Stephanie Tolson
Jada Adgerson
Diana Berrios

In 2022, the Scholarship Fund awarded a total of 15 scholarships in the amount of \$27,298 and received \$39,601 in contributions.



Team member, Diana Berrios, first-ever John Fofana Scholarship Recipient.



Team member, Emelda Che, recent PhD graduate.

Reaching Out To Our Neighbors

The Foundation awarded \$15,000 to the Outreach Committee of the Residents Association to fund several community projects to include:

- Tutoring at Cora Rice and Kettering Elementary Schools in Prince George's County.
- Making and delivering sandwiches for lunch program at St. Jerome Catholic Parish in Hyattsville.
- Donating packaged food to the Bowie Interfaith Food Pantry.

The Collington Foundation also sponsored the Prince George's Community College Foundation "Partners for Success" Gala benefiting the college's scholarship program. This is part of our partnership with the Collington Administration to establish relationships with the institutions of higher learning in the area. The initiative has resulted in an internship program with Collington's culinary department through Prince George's Community College, an Artist-In-Residence program with University of Maryland — School of Music, and various environmental projects with Bowie State University.

St. Jerome Cafe in Hyattsville receives 120 sandwiches twice per month, which are prepared by outreach committee members and other Collington community members.



The Collington Foundation Financial Report for 2022

	Contributions Received in 2022	Fund Balances as of 12/31/22
Annual Fund	91,076.00	367,950.00
Fellowship Fund	71,932.00	4,102,674.00
Scholarship Fund	39,601.00	748,607.00
Arts and Culture Fund	-	41,033.00
In-Kind Contributions****	21,286.00	-
Capital Fund	69,681.00	326,092.00
Totals	293,576.00	5,586,356.00
Other Revenue		
Investment Income	207,051.00	
Interest	31,648.00	
Grant Recovery	67,400.00	
Total Revenue	306,099.00	
Expenses		
Administrative		
Staff	124,427.00	
General Expense	18,664.00	
Fundraising	14,244.00	
Total Administrative Expenses	157,335.00	
Program Awards and Grants		
Annual Fund	19,704.92 **	
Fellowship Fund	161,656.00	
Scholarship Fund	36,229.00 *	
Arts & Culture Fund	-	
Capital Fund	- ***	
Total Awards and Grants	217,589.92	
Other Assets		
Note Receivable	972,571.00	
Contributions Receivable	50,750.00	
Other Receivable	26,341.00	
Total Other Assets	1,049,662.00	

*Actual amounts expended include Spring 2023 scholarships paid in December of 2022.

**Annual fund includes \$15,000 to RA Outreach, \$1,113 for the Picnic Table and the remainder to fall plantings.

***Renamed in 2023 to Administrative Projects

****In-Kind Contributions to benefit the Bole to Bowl Event, and a Raised Garden Bed.

Funds for the Wi-Fi Grant, EV Charging Stations and Sound Reduction Capital projects overlapped Collington Foundation's fiscal years. The grant "expense" was not recorded until funds were transferred.



The Collington Foundation Donors

January 1, 2022 through December 31, 2022

We extend our heartfelt gratitude to all who invested in The Collington Foundation in 2022, to provide for the programs and services of Collington Life Plan Community. Your contributions made it possible for the foundation to build community through grants, scholarships, and special projects on Collington's campus and in the broader community. Thank you!

Alexis Allen-Shorter	Marilyn Filemyr
Judythe Alston	Ingrid Finnan
Gary and Barbara Anderson	Joyce Fish
Ardyce Asire	Diane Fleming
Moya Atkinson	Jonathan Fleming
Elizabeth Barbehenn	Julia Freeman
Dorothy and John Barker	David Fry
Godelieve Bartley	Jacob Kijne and Marian Fuchs
Peter and Katie Basquin	Richard and Joyce Garrison
Grae Baxter	Raymond and Vera Garthoff
Mike and Sue Blanchette	Caroline Ghebelian
Lance and Cynthia Bonnet	James Giese
Leslie "Pat" Bozeman	Elizabeth Gill
Eloise Branche	Ann Gillespie
Denise Bunting	Suzanne Gimbrere
Mike and Pat Burke	James Gingerich
Lamar and Mercedes Burt	Mary Godfrey
Ken Burton	Beverly Goggins
Frank and Norma Caputo	Art Goldberg and Michele Sands
Ann Carlson	Phoebe Graham
Will Carrington	Rosalyn Graham
Sara Case and Nancy Eichert	Ruth Hanssen
Amy Castleberry	Lawrence and Susan Harris
Karen Cheney	Charlie Harvey
Charlie Clapper and Heather Huyck	Rosalie Hatcher
Joan Clark	Nadine Hathaway
Virginia Cobb	Katrina "Winkie" Hatton
Laurie Cobb	Lyle Denniston and Pamela Houghton-Denniston
Peter Cochran	Evamaria "Ria" Hawkins
Carolyn Collins	Robert and Anne Headley
Judith Collins	Austin and Sara Henry
David and Linda Creason	Ruth Ann Hess
George Crocker	Frank and Zora Hesse
Bonnie Cronin	John and Helen Hindinger
Phil and Mary Kathryn Cronin	Judith Hobson
James and Mary Ann Curley	Joan Hoff
RoAnne Dahlen-Hartfield	David and Nancy Honeyford
Vena Darling	Louise Huddleston
Ann Davie	Ben and Margaret Hutchinson
Brian and Carolyn Dennis	Pat Johns
Janet Dietrich	Patricia Jones
Paula Dozier	Clifton and Dorothy Jones
Terry and Joey Drown	Donna Joseph
Merritt and Carol Edner	Deborah Kapp and Tony Ruger
Gretta Estey	Maja Keech
Dennis and Sue Evans	Carol Kempcke
Bob and Linda Ewald	Mary Kim Family Trust
George Newman and Barbara Fairchild	Paul and Mary Jo King
Darlene Fann	Patricia Kirkham
Peter Fielding	James and Karen Kirts

Carl and Joyce Koch
Gail Kohn
Laney Langtry
Peggy Latimer
Helen Lauck
Sandra Lee
Bette Lemperle
Donald and Joan Lewis
Joy Liasson
Ann Marie Rahn and Kathleen Light
Priscilla Lindenauer
Bill and Nancy Lively
Michael and Louise Lusignan
Mike Lyles
Charles and Yvonne Maddox
Gifford & Margaret Malone
Marianne Mann
Phyllis Marsh
Thomas and Sandra McCain
John McCann
William and Roberta McCuskey
Mary McCutchan
Paul McManamen
Ron & Noel McPherson
Peg McQuarrie
Marilyn Meek
Charlotte Melichar
Robert Milford
Jane Miller
Adele Miller
Paige Mills-Haag
Jessica Milstead
David Montgomery
Barbara Morris
Lily Moureaux
Rosalind Muchiri
Ethel Murrell
Frances Nebesky
Dick and Trudy Neff
Moiria Nelson
Laurie Nichols
Alice Nicolson
Micky Noble
Adam Osteryoung
Maria Padron
Lois Pals
Donald Peterson
Peter Pfund
Dan Philipp
Nancy Phillips
Howard and Pat Piggee
Norman and Helen Prince
Bob Reed and Kathy Devlin-Reed

Lynn and Brad Reed
Rich and Sue Regen
Robert Reid
Maya Reju
Clarita Ricketts
Edward Robbins
Eulane Rose
Bernie and Faye Rosenberg
Roger Sandstone
Ruth Schrock
Eloise Scott
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Sonya Shelley
Peter and Marilu Sherer
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Norma Jean Vanagas
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Nancy Webb
Catherine Weber
Leslie Welch
Martha Wilder
Roger Williams
Susan Wolf
Irene Wood
Steve Woodbury and Ann Bauer
Judith Anne Young
James and Dorothy Yuan
Don and Pat Zelman
Julie Zelman Davis
Kendal Charitable Funds
Sysco Foods
RDI Construction
Collington Residents Association
Niemeyer Family Fund

The Foundation recognizes Collington Life Plan Community for its gifts of in-kind donations and services.

We strive for excellence in gift acknowledgement and recordkeeping.

Please contact the Foundation at (301) 925-7682 or PMills-Haag@collington.kendal.org with questions pertaining to your listing.



Ways to invest in The Collington Foundation

Visit The Collington Foundation:

<https://collington.kendal.org/giving/>
[Facebook.com/CollingtonKendal](https://www.facebook.com/CollingtonKendal)

Volunteer:

You can make a difference! Send an email to get started;
PMills-Haag@collington.kendal.org

Make a Gift:

Gifts to The Collington Foundation are tax deductible as allowed by law. The EIN is 52-2011239.

Gifts can be made online by debit or credit card and by check payable to The Collington Foundation and mailed to: The Collington Foundation, 10450 Lottsford Road, Mitchellville, MD 20721 or dropped off at the foundation mailbox by the Administration offices. Please designate the fund where we should apply your donation by writing it in the memo section of your check or enclosing instructions. Gifts that are not designated to a fund will benefit the Annual Fund (unrestricted) to be used where needed most.

The Foundation gratefully receives memorial and honor gifts, and notification of your thoughtfulness will be provided to the contacts or family members identified at the time of your gift.

The Foundation invites planned gifts in your will or trust, charitable remainder trusts, charitable gift annuities, gifts of real estate, vehicles, or stock, IRA designations, life insurance designations, donor advised funds, family trust funds, and more.

Every gift helps to build a strong and thriving community at Collington Life Plan Community and in our broader community in Prince George's County.

The Collington Foundation
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A KENDAL AFFILIATE

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