

NATIONAL LUTHERAN COMMUNITIES & SERVICES ANNUAL REPORT 2015

CREATING A BRIGHT FUTURE

OUR MISSION

To fulfill its Christian ministry, National Lutheran Communities & Services provides an array of options for seniors including residential living, along with home and health care services which are designed to meet individual needs.

2 Creating a Bright Future

Larry Bradshaw, President & CEO

National Lutheran Communities & Services

3 In Tune Innovators

Rev. Martha M. Sims, Chair

National Lutheran Communities & Services

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National Lutheran Communities & Services (NLCS) has much to be proud of—from heralding our 125th Anniversary to expanding our home care services (myPotential at Home—A National Lutheran Service) into the broader community, 2015 provided many opportunities to further our mission of caring for seniors.

Honoring our past and returning to our roots in celebration of our 125th Anniversary provided us a unique opportunity to focus on the future, and how we steward this long-standing legacy we've inherited. Creating a bright future is our opportunity at hand. To build upon our foundation for another 125 years, NLCS is focusing resources and programs to reach seniors beyond the walls of our retirement communities—this is happening through our home care expansion (and coming soon, home health), and our Community Impact program. Internally, we are creating a bright future by investing in our staff with various educational opportunities and trainings, as well as encouraging a holistic-wellness mindset for residents and guests at our retirement communities.

Thank you for your role in furthering our mission and helping us create a bright future for many decades to come.

*Larry Bradshaw, President & CEO
National Lutheran Communities & Services*

Original National Lutheran Home
at 18th & Douglas Streets, N.E.,
Washington, D.C.



A beautiful, new, hand-crafted pipe organ was donated to The Village at Orchard Ridge—A National Lutheran Community, as a generous gift from a resident who cares for others, loves music and worship, and sees it as vital for the community. An organ is capable of a variety of musical sounds and styles, and like the people we serve, requires care to keep it tuned and in good condition so that it will continue to make beautiful music for decades to come.

Like the organ, National Lutheran Communities & Services (NLCS) has been attentive to its mission of caring for and enriching the lives of seniors for 125 years. With a commitment to be an innovative leader in this field, we have grown from one community to three, while anticipating a fourth (The Village at Crystal Spring), and have stretched to embrace seniors beyond our communities with myPotential at Home—A National Lutheran Service and our Community Impact Program.

This has been accomplished by people who love NLCS and are passionate about its mission. We have good reason to be proud of this organization, the senior leadership team, boards and staff, and, above all, to be grateful for all those who have supported the mission of NLCS throughout its history. Our mission is clear: to be “in tune” with the needs of those we serve, to be good stewards of resources and healthy relationships in an ever-evolving climate of care where life is valued and respected.

*Rev. Martha M. Sims, Chair
National Lutheran Communities & Services
Board of Trustees, 2014-2016*



The Village at Rockville—A National Lutheran Community

Rev. Dr. Scott S. Ickert, Chair, Board of Trustees

Pastor Ickert also serves on the NLCS Board of Trustees, as well as Chair of The Village at Rockville Board. He has been the Senior Pastor of Resurrection Lutheran Church since 1995, having previously served parishes in Richmond and Leesburg. He has been active in ecumenical and inter-religious work for most of his ministry, having served a term on the USA Lutheran-Roman Catholic Dialog (Round #10); was appointed by the ELCA Church Council to serve as observer/participant for two consecutive rounds of the USA Catholic-Reformed Dialog; was appointed to serve a term on the Theological Commission of the Reformed Church in America; is a founding member of the local Lutheran Episcopal Coordinating Committee; a member of a local Lutheran-Catholic Dialog, and is Lutheran convener of a local Lutheran-Jewish Dialog.



The Village at Orchard Ridge—A National Lutheran Community

Lisa Behr, Chair, Board of Directors

Ms. Behr serves as Chair and is also a member of the NLCS Board of Trustees. Ms. Behr is a Realtor and has been with ERA OakCrest Realty, Inc. in Winchester, Va., since 2001. She is also an owner/manager of both residential and commercial real estate. From 2004 through 2009, Ms. Behr has earned the BRAR President's Award and ERA Leadership Team Award. In 2009, Ms. Behr was named 1st in Service by ERA Real Estate, earning the prestigious Jim Jackson Memorial Award. Her certifications include, Accredited Buyers Representative, Cartus/Affinity Certification and Senior Real Estate Specialist.

The Legacy at North Augusta—A National Lutheran Community

Dr. Steven Mosher, Chair, Board of Directors

Dr. Mosher is Director of the Health Care Administration Program at Mary Baldwin College, Staunton, Va., as well as Professor of Health Care Administration and Political Science. He teaches courses in a variety of Health Care Administration and Political Science areas that include health care strategic management, economics and finance of health care, long-term care administration, global health care and managed care. His research interests have been in the role and use of organizational audits, future of health care systems; long-term care and the quality of life, ethics in health care; and global health care Issues. Dr. Mosher has also contributed his time as a lecturer and presenter at various colleges and conferences.



A National Lutheran Service

myPotential at Home—A National Lutheran Service continued to grow and develop in 2015 by expanding beyond the walls of their sister organization, The Village at Orchard Ridge—A National Lutheran Community, to meet the home care needs of clients living in the greater Winchester and Frederick County areas. In 2015, 11% of all myPotential at Home clients lived in the greater Winchester community. With the footprint expansion, the need for expanded services followed. In October, personal assistants began offering chauffeur services to escort clients to and from doctors’ appointments, as well as to social activities such as group exercise classes and family reunions. In total, personal assistants amassed over 400 hours behind the wheel.

In an effort to continue to attract more seniors in need of home care services, myPotential at Home hired a Marketing and Community Outreach Liaison in June. Through newspaper advertising, radio, website design and involvement in local community outreach events, client awareness continues to rise.

myPotential at Home expects 2016 to provide more opportunities to support the seniors within the greater community by further expansion, to include Medicare-approved home health services.

Denise Kozlowski RN, MSN, Executive Director



AVERAGE AGE OF CLIENT: 84



AVERAGE LENGTH OF VISITS: 1.48 HOURS



17,328 HOURS OF CARE



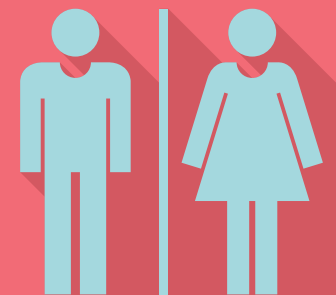
78 CLIENTS SERVED AT THE VILLAGE AT ORCHARD RIDGE



9 CLIENTS SERVED IN GREATER WINCHESTER



22 MALE AND 56 FEMALE CLIENTS





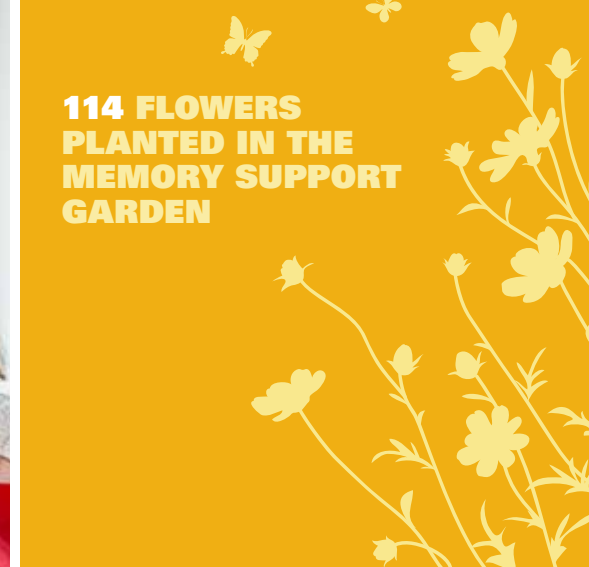
A National Lutheran Community

The Village at Rockville—A National Lutheran Community (TVAR) celebrated the completion of a four-and-a-half year renovation project in 2015. The Village Bean coffee shop and café opened and served its first Starbucks latte in June. At the same time, the Library, Hair Salon, Assisted Living Dining Room, Art Room, and Gift Shop opened in brand new, beautiful spaces. The Assisted Living Memory Support neighborhood was approved for occupancy and opened in August with eight new residents.

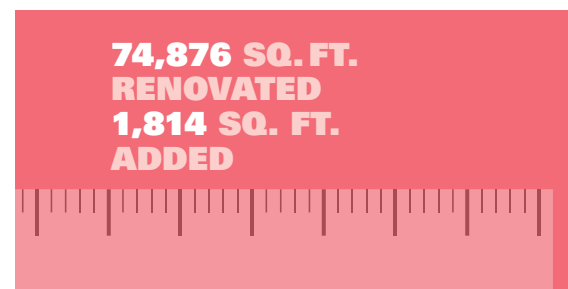
This year also marked NLCS' 125th Anniversary. Events throughout the summer were crowned with a grand celebration in September and commemorative time capsule, filled by residents and staff. The Cherish campaign, coinciding with the anniversary and end of construction, was also completed in 2015. Cherish helped to firmly establish the new memory care and support programs and also reflects the strong commitment to benevolent care. By tremendously enhancing the benevolent care endowment, Cherish empowers TVAR to continue to provide needed assistance for the next 125 years.

TVAR rejoiced in the transformation that happened in 2015, and we trust in God for continued growth and renewal. For as Isaiah says, "Those who hope in the Lord will renew their strength. They will soar on wings like eagles; they will run and not grow weary, they will walk and not be faint." Thanks be to God.

Jason Gottschalk, Executive Director



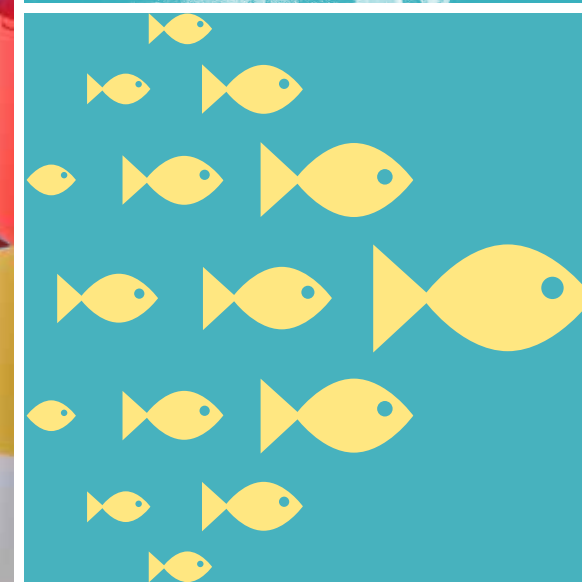
**114 FLOWERS
PLANTED IN THE
MEMORY SUPPORT
GARDEN**



**74,876 SQ. FT.
RENOVATED
1,814 SQ. FT.
ADDED**



**RESIDENTS SPENT
396 HOURS EXERCISING,
178 HOURS LISTENING
TO LIVE MUSICAL
PERFORMANCES
AND ATTENDED 263
CELEBRATIONS**



**OUR BELOVED
SCHOOL OF
FISH ATE 44 LBS.
OF FISH FOOD**

**250 FOUR-LEGGED
FURRY FRIENDS
VISITED**

At the January Annual Meeting, The Auxiliary—established in 1941—began the first in a series of year-long celebrations of an unprecedented 75 years of care and volunteerism that remains essential within a healthy, stable community, open to all faiths, for care needs. Service of one’s self for another’s need or enjoyment manifested itself in 2015 to fill a specific and urgent need—funds to purchase a new bus. The need was quickly fulfilled by May with a joyous presentation of the new bus to residents.

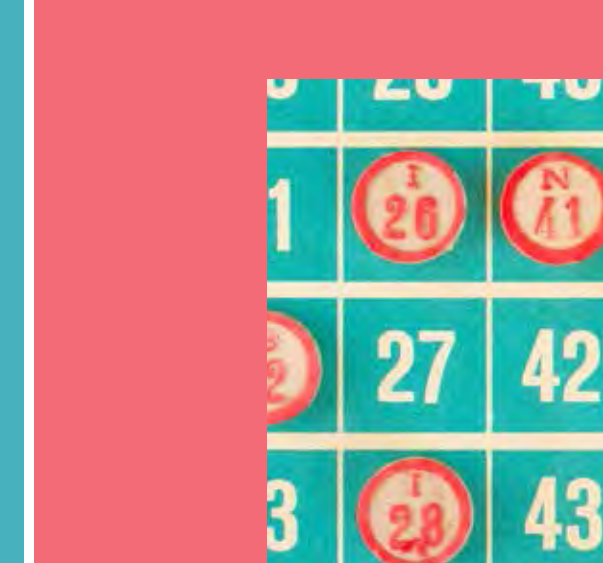
While each new year brings change, The Auxiliary provided a series of activities for the residents, many in partnership with Life Enrichment during 2015. Some resident activities included monthly birthday parties and bingo, the Spring Tea, luncheon outings to local restaurants, and programs featuring Squeals on Wheels. Appealing to residents’ hobbies, The Auxiliary hosted Rockville Bagpipes, an antique car show, and belly and tap dancing groups. The annual Oktoberfest, Fall Festival and Christmas Cookie Party remained a hit as well. As long standing tradition, the residents were also invited by St. John’s Lutheran in Martinsburg for lunch, now 42 years in a row.

Jeanne Buster, Auxiliary President

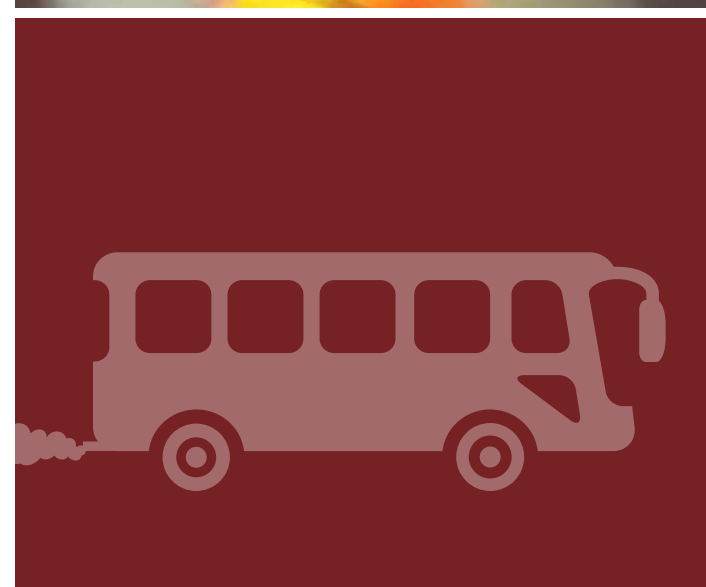
“‘MARTHA’ REPRESENTS SERVICE AND CARE; AND THIS IS WHAT THE AUXILIARY DOES.”

Rev. Elizabeth Platz
2015 Auxiliary Annual Meeting

Martha references the Biblical figure, Martha, who is known for her service and volunteerism.



\$20,000 RAISED AT THE FALL FESTIVAL





The Village at Orchard Ridge—A National Lutheran Community (TVOR) was a lively place of growth, transformation, and coming into its own in 2015. By February, the Assisted Living Memory Care reached its capacity of serving 18 residents. In July, with the addition of 18 more cottages in Phase I-B, the total cottage count reached 69. In addition, positive responses came through as the apartments and cottages exceeded plans of occupancy.

Not only was there growth of residents, the campus expansion project, which kicked off in 2014, had shovels hitting the ground since January. The expansion includes the addition of 80 independent living apartments, a 15,000 square foot wellness center with an indoor pool, a 150-seat dining addition, and an additional 10 skilled nursing suites in Orchard Woods Health Center. Completion of Phase II is expected in early 2017.

TVOR resident Richard Duesing, generously donated funds for a custom pipe organ that will reside in The Chapel at Orchard Ridge, *A Center for Faith and Community Life*. The instrument will replicate features of the chapel, including the paneling and walnut moldings of the ecclesiastical furnishings.

The community also experienced transformation in leadership this year as I came on board as the new Executive Director mid-year. We look forward to what 2016 will bring.

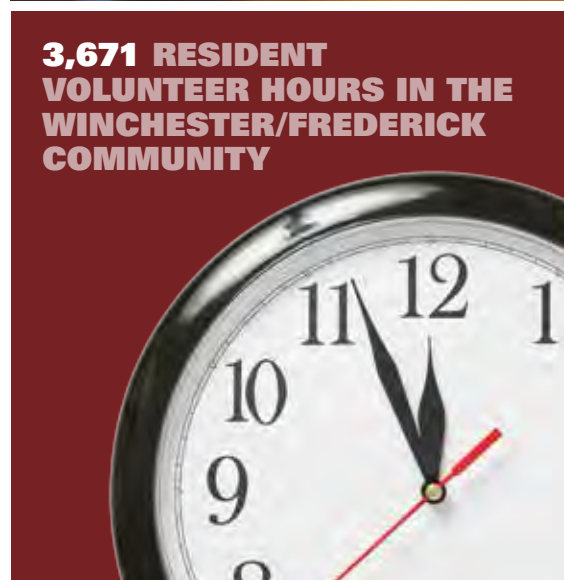
Melissa Fortner, Executive Director



**120 CHOCOLATE BARS,
35 FLEECE GLOVES, AND
25 SCARVES AS WE CARE
GIVEAWAYS TO STAFF**



**AVERAGED
92.5% DINING
SATISFACTION
SCORE**



**3,671 RESIDENT
VOLUNTEER HOURS IN THE
WINCHESTER/FREDERICK
COMMUNITY**



**8,824 MAINTENANCE
ORDERS FOR RESIDENTS**





The Legacy at North Augusta—A National Lutheran Community (TLNA) experienced a year of growth and change in 2015. TLNA welcomed Fonda Sundeen as the new Director of Sales and Marketing in January. Fonda brings an extensive background in marketing and enjoys serving the residents and community.

In June, minor renovations were completed. The bar area in the Bistro was reduced and converted into two offices. The screened-in porch off the Life Enrichment activity room was enclosed, creating an office for the department director and two additional work stations.

TLNA partnered with Mary Baldwin College and hosted an intern from the Health Care Administration program. She experienced operations within all departments and although her initial path was public health, she was influenced to pursue Administration in long-term care after her stint at the community.

The residents and staff celebrated NLCS' 125th Anniversary in November. It was a wonderful evening to celebrate the milestone of serving seniors and looking forward to continue the mission and ministry. Furthermore, the possibility of adding Memory Support services has been an ongoing discussion between TLNA and THW Design to envision the future needs of the community.

Cherie Powers, Executive Director



754 OMELETS SERVED DURING BREAKFAST

1,475 STUFFED ANIMALS SEWN AND GIVEN TO AUGUSTA HEALTH AND DENTAL CLINIC



**AVERAGE AGE: 86
(31% OVER AGE 90)**

AGE OF OLDEST RESIDENT: 102



Crystal Spring Annapolis is a new, planned mixed-use development located at Forest Drive and Spa Road in Annapolis, Md., that will be anchored by our proposed Continuing Care Retirement Community (CCRC) known as The Village at Crystal Spring—A National Lutheran Community (subject to approval by the Maryland Department of Aging).

The Village at Crystal Spring (TVCS) will offer seniors a variety of residential, lifestyle and health care options. Health care services will include assisted living, memory support, skilled nursing care and short-term rehabilitation.

Future TVCS residents and their families will enjoy coordinated use of an 80-room boutique inn and spa and approximately 145,000 square feet of commercial retail (restaurants, shops, food market). A truly intergenerational lifestyle will be enhanced by Crystal Spring Annapolis' apartments above retail and 80 non-age restricted townhomes and an acre-and-a-half of village green space for entertainment and community events.

Throughout 2015, the project team worked collaboratively with various Annapolis City planning departments and Maryland Department of Aging to continue to enhance the overall Crystal Spring plan. More than 130 out of the 190 acres will be preserved and never built upon. Visit www.thevillageatcrystalspring.org for more updates.



**2,696 INTERESTED SENIORS:
1,685 ARE MD RESIDENTS
623 ARE FROM ANNAPOLIS
1,011 ARE FROM OUT OF STATE**



Doug and Helene Bly have lived at The Village at Rockville (TVAR) for nearly 18 years. They moved here because it met their retirement goals: it's near family, includes good medical care, continuing education opportunities, transportation, and it's an economical solution for a comfortable, independent retirement. The Blys have enjoyed all of these benefits at TVAR. As a result, the community is not just some place they live—it is home.

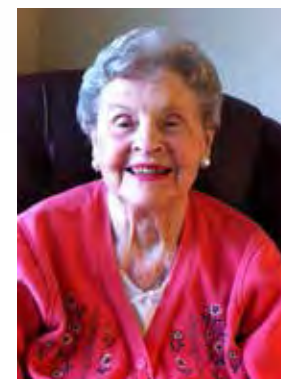
"These opportunities existed because many gave before us. Now it is our turn to start giving back so that others may have the same benefits," Helene expressed. "We have been blessed and now we have the pleasure of being able to give back."

Recently, the Blys decided to give from their retirement account. Most retirement accounts require a minimum annual distribution, and last year Congress passed a permanent part of the tax code that if an individual gives directly from their IRA or qualified retirement account to charity, it is credited towards their minimum distribution, and passes tax-free to the charity. That reduces their taxable income by the amount of the charitable distribution.

"This means more money in your pocket, unless you want to give that to charity too!" Doug said.

For more information on charitable giving, please visit www.thevillageatrockville.org/donate

*Kirsten Haalboom, Director of Philanthropy
The Village at Rockville*



From her early beginnings, Maxine Foster's love of art was intoxicating. She began painting in oils and was intrigued by nature's beauty, especially landscapes. Maxine soon found watercolors were her real joy, as well as being out among the outdoors.

"I paint landscapes because nature has already arranged these things and there is nothing like what nature can compose," Maxine shared in a previous interview.

Maxine and her family came to Rockbridge County in 1961 where she fell in love with the Virginia countryside. It wasn't long before her art was in high demand and today still adorns many of the important public buildings throughout the southern Shenandoah Valley, as well as art collections around the country. She also offered local painting classes and was always willing to share her knowledge and talent with others.

Maxine moved into The Legacy at North Augusta in 2013 and was a warm part of the character that makes up the charm of the Shenandoah Valley. After Maxine's death, her family donated five beautiful watercolor prints, known as the Serenity Series, in appreciation of the care she received. These prints now adorn the atrium in The Legacy, a special place that gives residents, staff and visitors a taste of the southern Shenandoah Valley from the hands of a gifted spirit.

For more information on charitable giving, please visit www.thelegacyatnorthaugusta.org/donate

*Tim Peifer, Director of Philanthropy
The Legacy at North Augusta*



Through their lives together, one of the common threads that bound them was caring for others. Pastor Lowell and Yvonne Knauff joined The Village at Orchard Ridge—A National Lutheran Community (TVOR) in 2013. Both led full lives around family, friends and had professional careers that involved caring for others—Lowell as a pastor in the ELCA and Yvonne as a nurse. TVOR appealed to them due to Yvonne’s Shenandoah Valley roots and Lowell’s previous ministry in and around the area.

Life is vibrant at TVOR and Yvonne took to the health and wellness aspect of resident life by engaging people in holistic health. She believed an important part of a health and wellness regiment was reflection and meditation—something they both considered meaningful in their daily lives.

Upon Yvonne’s unexpected death, Lowell brought to life an idea founded in her passion of caring for others while resonating with the act of reflection and meditation—a Memorial Garden. Nestled on the edge of a cluster of trees, within an easy stroll from the Chapel, now resides The Orchard Ridge Memorial Garden. Started with a generous gift from Lowell in memory of Yvonne, the Memorial Garden is sacred ground maintained with dignified beauty and honored as a place of peace and serenity. A place to care for others, celebrating the memory of someone who cherished that principle, by the one who cared for her.

*For more information on charitable giving,
please visit www.thevillageatorchardridge.org/donate*

*Tim Peifer, Director of Philanthropy
The Village at Orchard Ridge*



As National Lutheran Communities & Services (NLCS) has expanded its mission, the need to remain focused on the financial gifts it has received, as well as the fiscal health of the organization, remain paramount. Delivering a continuum of care either through the National Lutheran family of communities and services or providing management agent services for low-income seniors at Fellowship Square Foundation, being a good steward of the financial resources received continues to provide avenues of additional methods in reaching seniors. This continued outreach, growth and eye towards the future of senior care has NLCS poised to provide care and services to those with varying levels of financial resources, in and outside of our communities.

Benevolent Care:

For 2015, NLCS benevolent care totaled over \$6.4 million and served over 15% of the resident population of each National Lutheran community. NLCS is proud to say we've never had to ask any resident to leave our campuses because they were no longer able to afford the rising costs of health care.

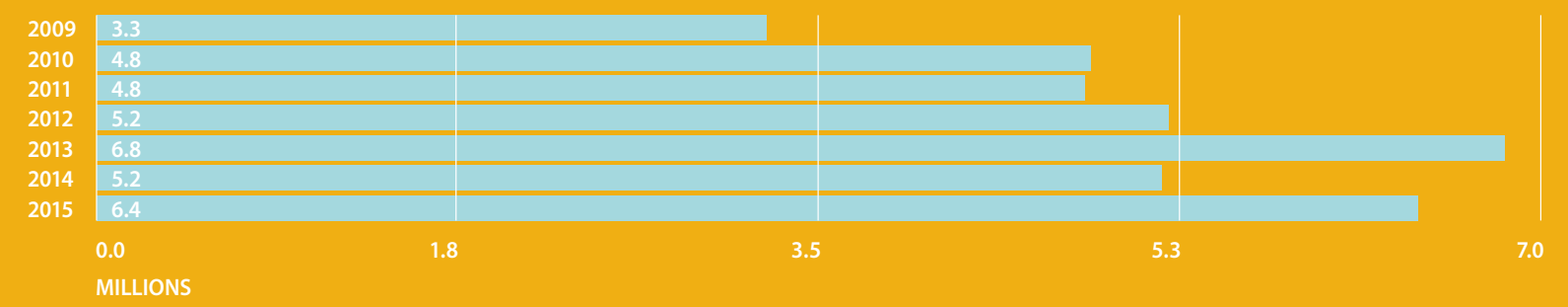
Operational Performance Summary:

Each National Lutheran community continued to evolve and mature. The Village at Orchard Ridge maintained an occupancy of over 95% within the independent living portion of the campus, along with an occupancy of over 85% in the assisted living memory support and long-term-care services of the community. The Legacy at North Augusta continued to accommodate more assisted living resident services while maintaining an occupancy rate of nearly 93% for 2015. The Village at Rockville completed a four-and-a-half year renovation project and opened its first assisted living memory support neighborhood. The Village at Rockville health care census remained active (particularly in myPotential short-term rehabilitation) for 2015 as occupancy was over 88% for the year, the independent living community maintained an occupancy rate of 94%, while the assisted living occupancy grew to 80% as of the close of 2015. While each of the communities in the National Lutheran family continues to evolve and prosper, resources are strategically allocated and stewarded in alignment with the NLCS mission.

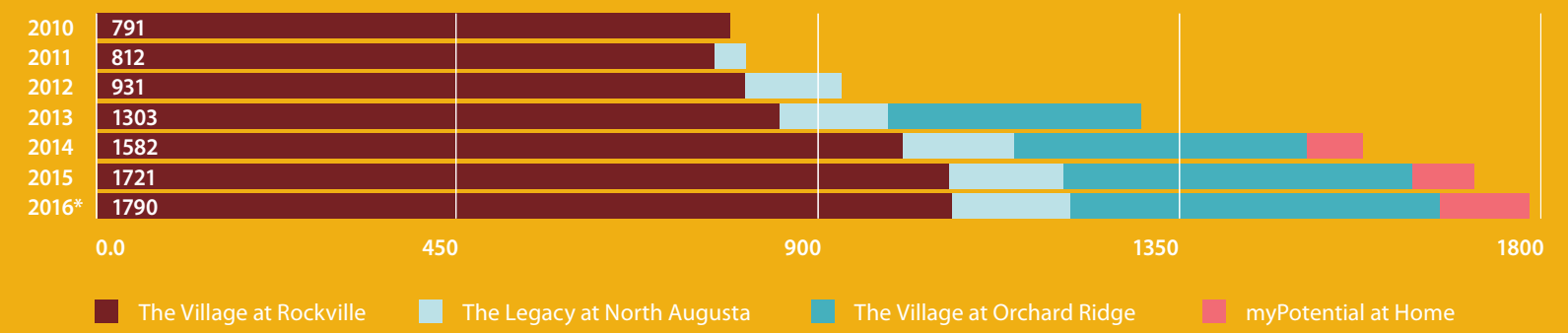
Growing Number of Seniors Served:

As NLCS has continued to expand its outreach and ministry, there are a larger number of seniors now being served by NLCS. This includes services delivered to an individual within their residence both on and off campus. These services include home care, independent living, assisted living, short-term rehabilitation and long-term-care, serving close to 1,700 residents and clients during 2015. As Phase II of The Village at Orchard Ridge opens in early 2017 this figure is projected to reach 2,000 residents served during 2017.

NLCS BENEVOLENT CARE



NLCS SENIORS SERVED



OUR EMPLOYEES

2013: **467** employees
 2014: **553** employees
 2015: **602** employees
 2016: **625+** employees*

What Areas Those 602 Employees Work In:

Health Services: **240**
 Dining Services: **117**
 Resident Services: **73**
 Environmental Services: **59**
 Administration: **113**

Commute From:

MD: **360**
 VA: **214**
 WV: **27**
 PA: **1**

Tenure:

0-4 years: **365**
 5-9 years: **131**
 10-14 years: **54**
 15-19 years: **23**
 20-24 years: **9**
 25-29 years: **15**
 30+ years: **5**

*projected estimates

CONSOLIDATED BALANCE SHEET DECEMBER 31, 2014 AND 2015

	2014	2015
Assets		
Current Assets:		
Cash and cash equivalents	\$4,430,608	\$1,287,931
Accounts receivable	2,171,169	1,939,094
Notes receivable-residents	473,162	-
Inventory	286,089	311,109
Prepaid expenses and other assets	768,518	1,236,596
Pledges receivable	99,825	115,353
Current portion of assets whose use is limited	3,743,009	7,729,351
Total current assets	\$11,972,380	\$12,619,434
Assets whose use is limited	18,621,170	18,173,416
Investments	117,500,754	93,493,384
Property and equipment, net	195,339,698	222,318,823
Funds held in trust by others	1,840,741	2,125,292
Pledges receivable, net	130,614	75,465
Deferred costs, net	13,345,698	13,701,558
Total assets	\$358,751,055	\$362,507,372

	2014	2015
Liabilities and Net Assets		
Current Liabilities:		
Accounts payable and accrued expenses	\$1,794,782	\$1,903,212
Accrued payable, construction	2,046,673	3,599,764
Accrued interest	2,592,937	3,084,587
Accrued expenses	2,008,006	2,465,278
Current portion of long-term debt	315,000	1,045,000
Current portion of annuities payable	38,853	38,135
Total current liabilities	\$8,796,251	\$12,135,976
Resident deposits	3,037,863	2,258,288
Monthly fees paid in advance	42,733	53,437
Deferred revenues from entrance fees	35,139,747	37,685,902
Refundable entrance fees	24,043,988	28,344,309
Long-term debt, net	99,180,000	115,700,000
Annuities payable, net	245,816	228,832
Total liabilities	\$170,486,398	\$196,406,744
Net assets		
Unrestricted	185,287,557	161,387,088
Temporarily restricted	1,091,378	2,725,473
Permanently restricted	1,885,722	1,988,067
Total net assets	\$188,264,657	\$166,100,628
Total liabilities and net assets	\$358,751,055	\$362,507,372

CONSOLIDATED STATEMENT OF OPERATIONS YEARS ENDED DECEMBER 31, 2014 AND 2015

	2014	2015
Unrestricted Revenues		
Net resident service revenues	\$38,491,639	\$42,473,391
Contributions	119,910	177,180
Interest and dividends, Net	3,117,226	2,812,988
Realized gains	7,452,622	2,294,372
Management Fees	432,257	539,955
Other Income	102,318	572,653
Total unrestricted revenues	\$49,715,972	\$48,870,539

	2014	2015
Expenses		
Salaries and wages	\$23,125,930	\$23,577,918
Employee benefits and payroll taxes	5,041,163	5,608,220
Medicare services	3,461,794	3,542,961
Other resident care	573,113	737,318
Professional fees	3,760,671	3,023,783
Supplies	1,241,651	1,140,099
Food services	1,952,581	2,035,069
Utilities and other occupancy	2,549,799	2,907,414
Depreciation and amortization	9,584,397	9,982,972
Interest	4,711,353	5,126,096
Insurance and licenses	589,801	587,244
Minor equipment	88,561	238,960
Repairs and maintenance	1,575,383	1,482,171
Advertising and recruitment	600,333	589,815
Information technology	1,588,481	1,245,441
Legal and accounting	229,709	227,841
Dues and subscriptions	1,108,717	1,205,597
Miscellaneous	1,070,445	1,665,377
Bad debt expense	526,815	636,440
Annuities	16,637	20,545
Loss on sale/disposal of assets	-	152,100
Total expenses	\$63,397,334	\$65,733,381
Operating loss	(13,681,362)	(16,862,842)
Unrealized losses	(3,400,263)	(7,037,627)
Change in unrestricted net assets	(\$17,081,625)	(\$23,900,469)

CONSOLIDATED STATEMENT OF CHANGES IN NET ASSETS YEARS ENDED DECEMBER 31, 2014 AND 2015

	2014	2015
Unrestricted Net Assets		
Change in unrestricted net assets	(\$17,081,625)	(\$23,900,469)
Temporarily Restricted Net Assets		
Contributions	247,218	1,373,144
Trust contributions	-	271,783
Change in value of funds held in trust by others	(493)	(10,832)
Change in temporarily restricted net assets	246,725	1,634,095
Permanently Restricted Net Assets		
Contributions	372,330	78,745
Change in value of funds held in trust by others	(54,058)	23,600
Change in permanently restricted net assets	318,272	102,345
Total change in net assets	(16,516,628)	(22,164,029)
Net Assets, Beginning	\$204,781,285	\$188,264,657
Net Assets, Ending	\$188,264,657	\$166,100,628

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