



Box 518 • Locust Grove, VA 22508 • www.lowlinc.org

2017 Annual Report

January 1, 2017 – December 31, 2017

Mission

LOWLINC is a nonprofit 501(c)(3) service organization dedicated to enabling seniors at Lake of the Woods to continue living safely and independently in their homes with meaningful connections to others and the LOW community. We provide services through LOWLINC volunteers, referrals to existing community organizations and preferred vendors/service providers.

2017 Overview

LOWLINC's second year has been one of exciting growth and continued accomplishments. We experienced growth in both memberships and volunteers and initiated a number of new programs to serve our members, build the skills of our volunteers, and reach out to the community. As our membership has grown, the number of services we complete each month has increased, and now averages 199. Our financial foundation remains solid with growth in both donations and our donor base. In September, we organized a very successful community fundraising event to coincide with the 50th anniversary celebration of Lake of the Woods.

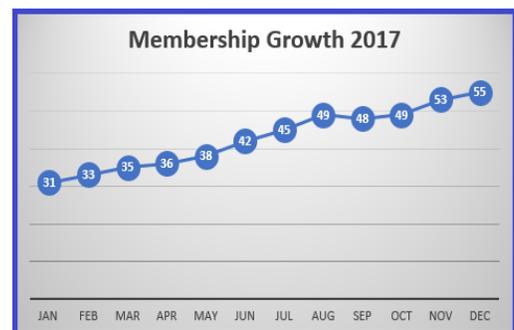
This report summarizes key accomplishments and milestones during our second year. To our donors, volunteers, members and Lake of the Woods residents and organizations, we thank you for your support and for helping us create a true "community of all ages" at LOW.

Membership



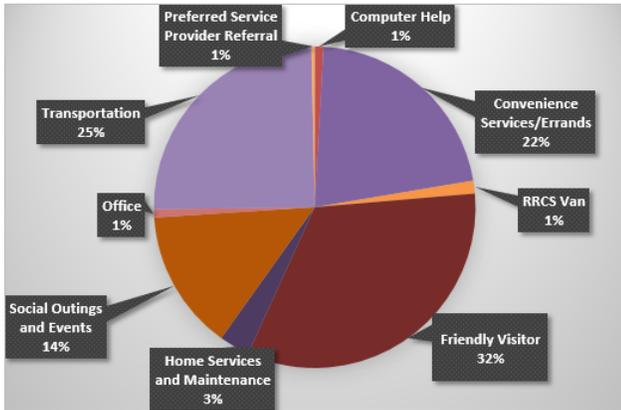
During the year, membership grew from 31 to 55 members (25 single memberships and 30 individuals with couple/household memberships), a 77 percent increase. During the year, one couple and one single member moved away, and one member withdrew her membership. The

annual fees paid by Members have not changed from 2016. The annual fees are \$400 for an individual and \$500 for a couple/household.



In October, with input from Membership Chair Gordon Rowe and his committee, we invited LOWLINC members to complete a membership satisfaction survey. We received 24 completed surveys out of 33 mailed. The results showed a very high level of satisfaction with LOWLINC membership, with all members agreeing that the organization has met their expectations. Respondents strongly agreed that LOWLINC provides the services they want and need and described their interactions with volunteers as excellent. The questionnaire also provided useful input about social activities and preferred service providers.

Member Services



LOWLINC volunteers perform a range of member services, including transportation, home maintenance, friendly visits, errands, technology assistance, and pet care. In addition, each month the Social Activities Committee, led by Maureen Callahan, organizes three or four social activities.

LOWLINC volunteers completed a total of 2,386 service requests in 2017, an average of 199 per month. Transportation, friendly visits/phone check-ins, social activities, and errands/mail pickups were the most frequently requested services. Volunteers provided 592 transports, made 679 phone check-ins and 127 friendly visits, and performed 307 mail

pickups. A total of 336 members attended 46 social events (meals out, concerts, movies, visits to historic sites, and presentations). Members and volunteers have also used our list of more than 40 preferred service providers who have had background and reference checks by our Preferred Service Provider Committee, chaired by Mary Hannon.

RRCS Van

Since December 2015, under a memorandum of understanding with Rappahannock Rapidan Community Services, an RRCS wheelchair-accessible van has been parked at the LOW Church and available to transport LOWLINC members, LOW residents, and residents of eastern Orange County to medical and legal appointments. Nine LOWLINC volunteer drivers, trained by RRCS, operate the van.



The RRCS/LOWLINC drivers completed 136 transports during 2017, of which 16 were in their cars and 120 in the van. Sixty-five (65) of these transports were for LOWLINC members; the balance was for LOW residents with a few for residents outside our community. Several RRCS transports are “long haul” in nature--trips to Charlottesville and Richmond to take veterans to the VA facilities there.

Volunteers



LOWLINC volunteers are central to our organization. We continue to be awed by their dedication, kindness, and commitment to our members. During 2017, 90 LOW residents served as LOWLINC volunteers (Please see pages 6 and 7 for a list). They have undergone criminal record and driver (for anyone who volunteered to drive) background checks, and they all participated in volunteer orientation sessions, organized by Board Member Carolyn Graham and Volunteers Committee Chair Vicky Fleming. LOWLINC volunteers contributed 2,073 hours of service during 2017, and they drove 14,187 miles -- equivalent to close to half the circumference of the earth! These data do not include hours spent on board and committee meetings.

In October, we invited LOWLINC volunteers to complete a volunteer satisfaction survey. Eighty-five percent reported “very” or “extremely” high levels of satisfaction with the activities they are asked to perform, and the time required. Ninety-one percent reported high levels of satisfaction with the scheduling process. The survey provided helpful information for planning 2018 Volunteers Meetings and other activities involving volunteers.

On December 13, we organized an appreciation event for members, volunteers and supporters. More than 100 attended, socialized, and enjoyed musical entertainment provided by Bill Feterle, Sherri LaHay Lasover and Bill Lord.

New Services and Initiatives in 2017

This year, LOWLINC initiated several new programs designed to enhance member services, build volunteers’ skills and reach out to LOW seniors and key stakeholders.

Medical Note-taking

In early 2017, LOWLINC arranged to secure a non-exclusive license from Northwest Neighbors Village for a Medical Note-taking Program. Medical note-takers help prepare members for appointments with healthcare providers, accompany members to the appointments, take notes, and give the notes to the member and, with permission, the family. Emily Slunt, Pat Shrader and Vicky Fleming customized the materials for LOWLINC, and Emily and Pat conducted two training sessions for 12 volunteers.

NewsLinc Newsletter

LOWLINC launched a quarterly e-newsletter in 2017 and published four issues. Each issue features a message from the Board chair or president, a Health and Wellness Corner article from a healthcare provider, a Volunteer Spotlight article on a volunteer or team of volunteers, and LOWLINC news and photos. We email the newsletter to volunteers, members, donors, supporters, and community stakeholders (e.g., LOWA Board) and mail it to several members without computer access. In our 2017 volunteer and member surveys, 100 percent of respondents reported satisfaction with the publication. Carolyn Rourke serves as editor, Marilyn Davis works on layout/design, and Liz McGillicuddy is copy editor. Mary-Jane Atwater serves as contributing editor.

Volunteers Monthly Meetings

During 2017, the Volunteers Committee organized a series of eight meetings for volunteers on topics that build their skills. The following were offered:

- 2/16: Confidentially/Privacy (Dr. Zoila Ortega)
- 3/28: Assisting Members with Mobility Aids (Christine Wagoner, Fire & Rescue)
- 4/25: Chest Resuscitation (Rick Hooper, Fire & Rescue)
- 5/23: Security's Role Helping Seniors (LOW Security Chief Scott Walker)
- 6/27: Membership Intake Process (Gordon Rowe/Membership Committee)
- 7/25 & 27: Medical Note-taking, (Emily Slunt & Pat Shrader)
- 9/25: Aging in Community (Atul Gawande webcast)
- 10/24: Club Express Discussion (Sparkle Capitano/Carolyn Rourke)



LOWLINC Speaker Series



Under the leadership of Elizabeth Arndt, LOWLINC offered a new Speaker Series program in 2017, with seven speakers on the following topics of interest to seniors.

- 3/21: Stress-free Organizing: Getting Rid of Tomorrow's Headaches Today (Kim Sawyer, A Better Move)
- 4/3: Knee Health (Elisabeth Robinson, M.D., U.V.A. Department of Orthopedic Surgery)
- 5/3: Legal Topics for Seniors (Katherine Charapich, Esq.)
- 6/1: Nutrition as We Age (Maureen Watts, R.D.N.)
- 7/10: Driver Safety: GrandDriver Program (Nancy Lo, VA GrandDriver Coordinator) and AARP Driver Safety Program (Su Bielmeier)
- 9/25: Celebration of Aging in Community (Atul Gawande, M.D. webcast)
- 11/16: Archaeology at Fort Germanna. (Eric Larsen, Ph.D.)

LOWLINC Video

Thanks to TV producer Norm Allen of American Lifestyle Media, LOWLINC now has two videos (10-minute and 4-minute versions) that tell the LOWLINC story and are used in outreach events. These videos feature testimonials from members, volunteers, and the leadership team. Mary-Jane Atwater, Carolyn Rourke, and Lee Strain, Communications Committee, assisted Norm with production logistics.

University of Mary Washington (UMW) Honors Program Partnership



The UMW Honors Program leadership invited LOWLINC to develop a short-term project for one or two sophomore honors students during the fall semester. We proposed a project to research smartphone use by members with the goal of laying the groundwork for the creation of a smartphone instructional guide. Two students, Hannah Treichler and Cristina Montemorano, collaborated with us during the fall, conducting research about what types of phones members use, which functions they use, what they would like to learn, and how they learn (e.g., whether by reading, demonstration or both). The students

also facilitated a focus group discussion and coaching session with several members on November 4. We expect to continue collaborating with UMW on the next phase of the project, which will use the students' report and recommendations from the fall semester to develop an instructional guide and conduct additional coaching sessions. Carolyn Graham, Mary-Jane Atwater, Carolyn Rourke, and Vicky Fleming served as advisors and mentors.

New LOWLINC Participant Category – Supporters

Recognizing that some Lake of the Woods residents want to contribute to LOWLINC programs without becoming Volunteers who provide services to members, we established a new category of participant: LOWLINC Supporters. This group provides assistance to LOWLINC programs and operations such as planning and supporting fundraisers, or performing a unique service to benefit LOWLINC (e.g., graphic design services and audiovisual production services).

Other Activities

- A large group of volunteers participated in the LOW July Independence Day parade with a festive, creative float, organized by Maureen Callahan.
- Mary-Jane Atwater, Carolyn Rourke and Vicky Fleming staffed a LOWLINC table at the October 2 Aging Together Expo, letting others know about our aging-in-community village.
- Jeff Flynn and Carolyn Rourke gave a presentation about LOWLINC at the Annual Meeting of the Aging Together organization in October. In June, Mary-Jane Atwater spoke about LOWLINC at a meeting of Orange County Aging Together.
- During the summer months, Mary-Jane Atwater gave presentations about LOWLINC to agents at four local realtors: Century 21, Coldwell Banker Elite, Licata Group, and Weichert.
- The LOWLINC Board members at their own expense, participated in the fourth annual Village to Village Network Conference in Baltimore, November 5-8. We networked with representatives from other villages, attended presentations, and came home with ideas for new activities and programs.

Leadership

Board of Directors:

Jeff Flynn, President

Mary-Jane Atwater, Chair and Secretary

Carolyn Rourke, Vice chair

John Beisheim, Treasurer

Carolyn Graham, Member

Donalda M. Lovelace, Member

Emily Slunt, Member (August – December)

Dave McKee, Member (January – August)

Coordinator: Sparkle Capitano

Early in 2017, Dave McKee joined the Board of Directors but resigned in August to prepare for a move. Emily Slunt was elected to fill Dave's term. Carolyn Graham, who served the board with distinction from 2015 to 2017, completed her term. In recognition of Carolyn G.'s service, dedication and support, the Board named her Board Member Emeritus in December 2017. Vicky Fleming was elected to membership on the Board, with her two-year term beginning in January 2018.

Committees

LOWLINC's committees work behind the scenes and have been a key part of LOWLINC's successful year.

Volunteers Committee: Chaired by Vicky Fleming, Ann Hatfield (co-chair through June)

Members: Debbie Beisheim, Carl Clawson, Lynn Cryblskey, Ann Hatfield, Natalie Logan, Zoila Ortega, Shirley Rowe, Nora Simpson

Membership Committee: Chaired by Gordon Rowe

Members: Bud Logan, Louise Schwabenbauer, Judy Sheridan, Leon Strain, Elizabeth Wiley

Communications Committee: Chaired by Nancy Strain

Members: Mary-Jane Atwater, Marilyn Davis, Carolyn Rourke, Leon Strain

Fundraising Committee: Chaired by Donalda Lovelace

Members: Mary-Jane Atwater, Judy Flynn, Kathy Genson, Nora Simpson

Preferred Service Provider Committee: Chaired by Mary Hannon (Dave McKee chair through August)

Members: Bobbie Prees, Nora Simpson, Leon Strain, John Undari

Social Activities Committee: Chaired Maureen Callahan (Emily Slunt co-chair through August)

Members: Elizabeth Arndt, Carleen Delio, Lea LeBar, Christy Rappoport, Mary Ann Rogers, Shirley Rowe, Phyllis Sakole, Joe Sauro, Nancy Strain, Susan Wright

Administrative and Membership Renewal Support: Ruth Pavlik, John Rourke

We Celebrate Our Volunteers

| | | | | | |
|------------|------------|----------|-----------|-----------|-----------|
| Eileen | Appleyard | Carl | Clawson | Kathy | Genson |
| Elizabeth | Arndt | George | Colby | John | Gingrich |
| Mary-Jane | Atwater | Patricia | Cope | Vicki | Gingrich |
| Carol | Bailey | Lynn | Cryblskey | Larry | Godla |
| Tom | Bailey | Ted | Cryblskey | Carolyn | Graham |
| Debbie | Beisheim | Marilyn | Davis | Peggy | Grella |
| John | Beisheim | Carleen | Delio | Hope | Hall |
| Diohn | Benedict | Walter | Diercks | Alice Ann | Halverson |
| Carol | Bohrer | Margaret | Driscoll | Mary | Hannon |
| Hattie | Brinsfield | Diana | Duffy | Ann | Hatfield |
| Diana | Calegari | George | Duffy | Loretta | LaTerra |
| Maureen | Callahan | Barbara | Fetzer | Lea | LeBar |
| Salvatore | Capitano | William | Fetzer | Bud | Logan |
| Sparkle | Capitano | Vicky | Fleming | Natalie | Logan |
| Georgianne | Cedarblade | Jeff | Flynn | Bean | Lohmann |
| Bonnie | Chadwick | Judy | Flynn | Marjorie | Lohmann |

| | | |
|-------------------|----------------------|-----------------------------|
| Donalda Lovelace | Mary Ann Rogers | Nora Simpson |
| Dave McKee | Carolyn Rourke | Emily Slunt |
| Jean McLallen | John Rourke | Leon Strain |
| Jim Oldham | Gordon Rowe | Nancy Strain |
| Mary Jane Oldham | Shirley Rowe | Betty Tabor |
| Zoila Ortega | Brenda Rugless | Sylvia Templin |
| Ruth Pavlik | Mike Rugless | Beth Thomas |
| Wayne Perry | Joe Sakole | John Undari |
| Bobbie Prees | Phyllis Sakole | Donald Walters |
| James Protiva | Karl Salis | Carla Wascalus ¹ |
| Val Protiva | Joseph Sauro | Elizabeth Wiley |
| Christy Rappoport | Louise Schwabenbauer | Mark Woerner |
| Rick Rappoport | Judy Sheridan | Susan Wright |
| Claude Rogers | Patricia Shrader | Coryn Zentz |
| Margot Zimmerman | | |

LOWLINC's RRCS Drivers

| | |
|-----------------|--------------|
| Bonnie Chadwick | Bob Shope |
| Jeff Flynn | Betty Tabor |
| Brian Hall | John Undari |
| Dave McKee | Boggs Wright |
| Joe Sakole | |

We Thank Our Supporters

| | | |
|-----------------|----------------------|----------------|
| Norm Allen | Lou Dimassa | Stan Lasover |
| Brenda Anderson | Cathy Edwards | Bill Lord |
| Ann Bayer | Bill Feterle | Joya Lord |
| Cheryl Brown | Jonnie Feterle | Bob McFarland |
| Dianne Condon | Sandie Frame | Lisa McKinney |
| Jan Davis | Sherri LaHay Lasover | Randy McKinney |

¹ We were saddened to learn of the passing of Carla Wascalus on January 7, 2018.

Fundraising and Financials

We held two fundraisers during the year. On June 23, Donalda M. Lovelace and a team of volunteers organized a 50/50 raffle at a Friday evening Concert on the Point. Our second fundraiser, organized by Judy Flynn with a team of more than 50 volunteers, was an At the Hop '50s concert and dance, held as part of LOW's 50th anniversary celebration. Held on September 30, At the Hop featured outstanding performances by Bill Feterle and Sherri LaHay Lasover, with Bill Lord as emcee. Tickets to the event, sold through the TIX system, sold out in three weeks, and 220 danced and sang to the '50s and '60s music

In December, we placed an insert in Lake Currents. This colorful card thanked the community for its support during our second year, listed accomplishments and key activities, and invited readers to consider making a donation to LOWLINC. The insert, combined with an email appeal to past donors and volunteers, brought in \$16,000 in donations. These donations supplemented gifts from other generous donors, which we received throughout the year. More than 50 donors contributed a total of nearly \$24,000 to LOWLINC in 2017. Donations are a critical component of LOWLINC revenue, as membership fees do not cover all of our operating expenses.

Benchmarking

In 2017, Treasurer John Beisheim undertook research to analyze LOWLINC member service use and benchmark the value of transportation and home services, using the fair market value if members were to arrange for the same services in the marketplace. In his report, *Measuring Value of Services*, John showed that for our membership as a whole, LOWLINC delivers two times the value of membership fees paid.

Financial Report CY 2017

| Account | 2016 | 2017 |
|---|------------------|------------------|
| Membership | \$ 7,875 | \$ 17,076 |
| Donations | 26103 | \$ 24,124 |
| Grants, Corp. Contributions | \$ 4,438 | \$ 200 |
| Fundraisers | \$ 957 | \$ 6,020 |
| Revenue | \$ 39,373 | \$ 47,420 |
| Staff | \$ 11,719 | \$ 14,593 |
| Background Checks | \$ 499 | \$ 331 |
| Office, Telecomm, Website Related | \$ 2,640 | \$ 1,416 |
| Village to Village Network ("V-t-V") | \$ 550 | \$ 1,232 |
| Club Express | \$ 459 | \$ 500 |
| Transportation | \$ - | \$ - |
| Mktg., Adv., Fund Raising | \$ 2,450 | \$ 3,242 |
| Insurance, Professional Fees | \$ 3,368 | \$ 2,308 |
| Volunteer Appreciation, Social Activities | \$ 413 | \$ 1,972 |
| Health Matters Toolkit (funded by grant) | \$ 4,160 | \$ - |
| Training | \$ - | \$ 160 |
| Expenses | \$ 26,258 | \$ 25,754 |
| Net Income | \$ 13,115 | \$ 21,666 |

Comments on Financial Results

1. While the number of members increased 77 percent, membership income increased over 100 percent. This was due to both the growth of members to a total of 55 and to the increase in memberships paid on an annual versus quarterly basis.
2. Donations from individuals remained strong and accounted for 51 percent of revenue in 2017.
3. Fundraiser events, particularly *At the Hop*, compensated for the significant reduction of grants and corporate contributions.
4. Office expenses were tightly controlled and were reduced from 2016's start-up levels.
5. In 2016, only one board member attended the Village to Village Network ("V-t-V") national conference in Ohio. In 2017, with the meeting in nearby Baltimore, all board members attended. They paid the majority of their registration, travel and accommodations expenses to attend the conference. We paid \$600 for the conference in 2017, which was divided among the seven board members to assist with these expenses. In addition to our membership in V-t-V (\$425 annually), we also expanded our contacts within the network by joining the Washington Area Exchange.
6. Monthly fees for ClubExpress (LOWLINC's management system) increased with the increase in membership.
7. Fundraising expenses increased in support of *At the Hop* and appeals to donors.
8. Volunteer appreciation and expenses for social activities for members increased due to the expansion of social events in 2017 versus 2016.
9. The 2016 *Health Matters Kit*, was a one-time project funded by a special grant for the same amount.
10. In 2017 we purchased Medical Notetaking training materials from the Northwest Neighbors Village (Washington, DC). The training account will vary from year to year in scope.
11. Holding expenses relatively constant with 2016 enabled LOWLINC to increase its net income and achieve a strong working capital position.

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