



# 2018 Annual Report

## From the Board of Directors



*Our "Welcome Home" program after a hospital stay continues to be one of our most valued member benefits.*

Waterfront Village, in our service area of the Southwest Waterfront and the Navy Yard, saw another robust year of growth with the individuals served increasing nearly 20%. After just two full years of operation, we are now comparable in size to neighboring Foggy Bottom/West End and Georgetown Villages. Our growth has been steady and consistent, with Full Service members representing just under a third of our membership.

During the past year, we focused very deliberately on collaboration and cost-sharing with other District senior villages, through the D.C. Villages Collaborative. The Board and our executive director have attended over 20 meetings as we've shared best practices, built important connections, and improved our efficiencies. All-villages activities around the District included six theatre evenings and a book lecture which we hosted.

Our programming continues to resonate very positively with our Members and is highly respected by our colleagues in the Collaborative, with five of our events attracting over 50 attendees and our annual Happy at Home Expo over 120. Our events have also proven an effective way to recruit and retain Members. Our vibrant *Navigator* e-newsletter continues to effectively connect our Members, Donors, and Volunteers and, according to our newsletter provider, enjoys extraordinarily high readership rates (over 50% in a typical month) for publications of its type.

Our success is only possible with the help of all who support us. With one paid full-time employee and seasonal part-time help, our Village could not have operated without our network of volunteers, who provide services to Members and who aid with office duties, and who include the Board and committee members who enthusiastically share their expertise, empathy, and talents. Our donors have been more generous than ever, with the Friends of Waterfront Village donations increasing nearly 50% and notable grants received from Forest City, Friends of Southwest D.C., and JBG SMITH. We will continue to depend on the neighbors and others who join and contribute to Waterfront Village so that our dues can remain affordable in our mixed-income community.

As we enter our third full year of operations, our primary objective is to transition the Village from a growth mode to a steady-state model reasonably consistent with our peer organizations. We will continue to devote resources to expand our reach into the Navy Yard and explore every opportunity to find synergies and build relationships through the Collaborative. In the third quarter of the year, we plan to offer more subsidized memberships to increase the economic diversity of our membership.

We wish to extend sincere thanks to the donors listed on the back page of this Annual Report, and to our Treasurer Wes Ven Johnson whose term completed during 2018. Many of the improvements to our financial management you will read about in the Treasurer's Report began under Wes's leadership and reflect his vision.

Barbara Ehrlich, President

## Executive Director's Report

### Consistent Membership Growth

Village dues-paying membership grew from 98 to 128 households representing 172 individuals:

*Supporting Members* (114) may attend our programs and access our neighbor-referred vendors. Participation is open to the general public at \$300 per year, \$200 of which may be considered a donation for tax purposes.

*Full Service Members* (52) have access to staff- and volunteer-provided services, including rides to medical appointments, a weekly shopping shuttle, in-home support during their vendor interactions, telephone and in-home check-ins, technology assistance, and hospital/rehab “Welcome Home” services. Participation is limited to those 62+ in our service area for \$625 per year with subsidies offered for those with annual incomes below \$54,000.

*Companion* (formerly Social) Members may attend our events in the company of a sponsoring Supporting or Full Member. The \$50 fee is waived when the support is deemed required for the Member to participate.

*Community Leader* complimentary memberships are provided to building managers, clergy, and community association leaders who agree to act as Village advocates, and to support our access into their communities. Benefits are limited to attending our programs.

### Providing Services Through Dedicated Volunteers

The net number of trained, vetted volunteers grew only slightly, from 28 to 31, as the focus shifted from recruiting to improving the productivity of the Volunteer team and raising satisfaction with their Village experience. Volunteers were accepted whose interests better matched Member needs, with the number of volunteer drivers increased from nine to 14, and a pre-training interview process was initiated. By year's end, the team's share of successfully completed Service Requests increased from just under two-thirds to nearly 100%, including 562 rides and over 100 home visits. A weekly update and appreciation email thanking the previous week's Volunteers was initiated, and our first Volunteer Appreciation Celebration, held at a Navy Yard restaurant, remains the best-attended event held by Waterfront Village excepting our annual Happy at Home expo. Volunteers receive classroom training and a procedures manual, are insured, and background-checked.

### Building Social Networks

Participation in Village activities increased 51% in 2018, with a total 1,804 registrations. Our most popular activities were dining events (534 registrations), lectures and tours (321), wellness-related seminars (217), and theatre evenings (195). Attendance notably grew at member-managed activities including the book club and pot luck dinners. A special emphasis was again placed on holiday season programming, with a record 12 events drawing 160 attendees in December.



2018's monthly day trips included the new water taxi to Alexandria's waterfront for lunch and an art gallery tour.

## Treasurer's Report

### Automating Procedures

A major initiative of 2018 was automating our accounting and financial processes, utilizing QuickBooks® software, and an effort in tandem with contracting the bookkeeping service utilized by Dupont Circle, Foggy Bottom/West End, and Northwest Neighbors Villages. Together, these process improvements will allow our executive director to devote more time to member services and will greatly simplify our 2018 tax preparation and reporting.



*Waterfront Village became the first D.C. Village to be awarded the Seal of Transparency by GuideStar, a non-profit rating organization.*

### Reducing Dues Reliance

With a sharp focus on fundraising, led by an extremely successful inaugural Homes of the Southwest Waterfront house tour, our reliance on dues fell from 38% to 33%. For Waterfront Village to remain affordable in our mixed-income community (we are the only full-service Village offering whose Supporting Memberships are offered at reduced dues versus Full Memberships), we must continue to develop our base of donors and grantors.

Our individual donor program, Friends of Waterfront Village, saw healthy growth from 28 to 44 participants, and the renewal of our matching grant from Friends of Southwest D.C. saw, once again, matching funds well in excess of goal. A major initiative for 2018 was the launch of a planned giving program with an initial pledge, from one Village member, of \$20,000.

Waterfront Village became the first D.C. Village to be awarded the Seal of Transparency by GuideStar, a non-profit rating organization. We applied for inclusion in the Combined Federal Campaign for 2019 and, at publication date, are awaiting word on our application.

### Financial Overview

It is my opinion, and that of the Executive Committee, that the Village's finances were prudently managed in 2018 with expenses at or below comparable Villages in our region. The organization is in a stable financial condition with a positive account balance going into 2019.

The Village started 2018 with a concerningly low cash balance of just \$2,202.52 after ending 2017 with a negative cash flow. At 2018's end, our cash balance had improved to \$17,326.75, due in great part to Board donations and fundraising exceeding plan. Our 2019 budget anticipates a positive year-end balance of \$14,391.

Carol Cowgill, Acting Treasurer

### Revenues

Donations/Fundraising	\$62,428.56
Memberships	62,196.90
Grants	10,800.00
Other Revenue	<u>7,777.93</u>
<b>Total Revenues</b>	<b>\$143,203.29</b>

### Expenses

Operations/Services	\$55,616.70
Fundraising	34,499.40
Programs/Activities	18,305.59
Facilities	5,765.02
Insurance	5,231.58
Marketing	3,347.85
Administrative	2,589.52
Financial Services	1,523.36
Other Expenses	<u>1,200.00</u>
<b>Total Expenses</b>	<b>\$128,079.02</b>

## 2018 Board of Directors

Barbara Ehrlich, President  
Carroll Quinn, Secretary  
James Burleson  
Katherine Crump-Wiesner

Carol Cowgill, Vice President and Acting Treasurer  
Daniel P. Jones, D.D.S.  
Anne Martin  
Andy Peers

## Admirals - Donors of \$2,500 and Higher

Carol Cowgill  
Hans and Katherine Crump-Wiesner  
David and Barbara Ehrlich  
Forest City Washington

Friends of Southwest D.C.  
JBG SMITH  
Andy Peers | Compass Realty  
Carroll Quinn

## Captain's Club - Donors of \$1,000 and Higher

Chris Beck and Bob Craycraft  
James Burleson  
Rita I. Coll

Nelson and Carolyn Crouch  
Georgetown Home Care  
Anne Martin  
Victoria Peckham

SWBID  
David Taylor, Estate Planning  
Wes and Savin Ven Johnson

## Friends of Waterfront Village – Donors of \$250 and Higher

Lew Bashoor  
Malcolm E. Bernhardt  
Susan Bradshaw  
Marion Buelken  
Capital City Nurses  
Jay M. Castano  
Mary Caulfield  
Brenda B. Coakley  
Renee Feder  
Charles R. Flynn

Jim and Pat Flanigan  
Juanzetta S. Flowers  
Forest Hills of D.C.  
Susan T. Goodman  
Elaine F. Graves  
Beverly A. Gray  
Deborah Greenstein  
John Hoag  
Dr. Betty Jean Tolbert Jones  
Dr. Donald Wallace Jones

Dan G. King  
Bill Koerner, Elder Law PLC  
William and Ruth Lubic  
Noreen Lyne  
John J. McGrath  
Nandos PERi-PERi Navy Yard  
Neal and Barbara Peirce  
Diane Renzulli  
Residences at Thomas Circle  
Elaine Riccio

Rod Ross  
Silvernest  
Bob Rudney  
Joelle Rudney  
James R. Shamburger  
Smile Beautiful Dental  
Ellen Spencer  
Eva Whitaker  
Gary M. Young and  
George Zapata, Jr.

## Service Volunteers

Chris Beck  
Joe Bressler  
Martha Brooke  
Carol Cowgill  
Katherine Crump-Wiesner  
Dan Davis  
Ranada Davis  
Lauren Dieleman

Vania Georgieva  
Marie Giovanelli  
Loren Hall  
Bonnie Harris  
Norma Joiner  
Jane Jorgensen  
Judy Judd-Price  
Dick Lang

Anne Martin  
Victoria Peckham  
Ed Peterman  
Carroll Quinn  
Jean Sammon  
Rosario Scarato  
Jo Ann Scott  
Akiko Sprague

Thorny Staples  
Malia Tarasek  
Wayne Terwilliger  
Kathy Trickey  
Karen Van Allen  
Frani Williams  
Wendy Wright

## Special Acknowledgments

Village Night at Arena Stage 2018-2019 Season Guarantor: Tom Sherwood  
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Director and Registered Agent: Bob Craycraft 607 Sixth Place, S.W. Washington, DC 20024  
Telephone 202-656-1834 [www.dewaterfrontvillage.org](http://www.dewaterfrontvillage.org) [info@dewaterfrontvillage.org](mailto:info@dewaterfrontvillage.org)

Waterfront Village, Inc., is a neighborhood-based membership organization of paid staff, volunteers, and vendors supporting residents who wish to age in place in the Southwest Waterfront and the Navy Yard. Waterfront Village is a 501(c)(3) public charity (EIN 81-1859871) incorporated in the District of Columbia and a member of the national Village to Village Network

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