

LOPEZ HOUSING OPTIONS

THE HAMLET 2015 ANNUAL REPORT



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*Special thanks to Marc Foster Grant for his beautiful painting of our Hamlet on the cover



INTRODUCTION

Fifteen years ago, a small group of friends gathered around a Lopez kitchen table to brainstorm a problem: too many long-time islanders were having to leave their homes and move to the mainland, causing deep sadness for themselves and for the community that cherished them.

What if islanders didn't have to move away when their homes became too much to keep up or because of health changes as they aged? What if they could stay right here on the island, living out their lives in their own community?

The friends believed a solution could be found. As discussions continued, their vision became clear: build a residential cottage community for independent people age 55-plus and an adult family home for those who needed more support.

The task was formidable, but friends and neighbors stepped up to help. In April of 2004, a non-profit board was convened. Momentum began to build. Research, blueprints, fundraising and permitting got underway. When a site was found in the heart of Lopez Village, the project took wing.

The Hamlet Cottages opened in August of 2008. Gale McCallum and Annie Fox, the first two residents, still tout the joys of Hamlet life. As Gale likes to say, "Moving to the Cottages was one of the smartest things I've ever done!"

Hamlet House Adult Family Home opened its doors later that year and began serving islanders who needed compassionate, caring 24-hour support in a beautiful, nurturing environment.

Our Founders' dreams could not have come true without years of hard work by scores of determined, talented, dedicated volunteers and the on-going financial support of the Lopez community.

We dedicate this report to all those islanders who, working together, continue to make The Hamlet dream come true.

LOPEZ HOUSING OPTIONS
2015 ANNUAL REPORT

Lopez Housing Options is a 501(c)(3) non-profit charitable organization guided by a volunteer Board of Directors. This report presents a snapshot of our year and discusses the significant issues, actions and developments from January 1 through December 31, 2015.

M i s s i o n

The mission of The Hamlet / LOHO is to provide safe, convenient housing on Lopez Island for people 55 and over: an adult family home for six individuals needing 24-hour care and 14 garden cottages for rent to independent seniors. We offer almost half of our cottages and at least one room in our adult family home at reduced rent for those living on limited incomes.

V i s i o n

We support the wellbeing of all we serve by providing secure, affordable, attractive housing in an inclusive, caring environment.

V a l u e s

We act out of a belief that seniors on Lopez Island should not have to leave the community they love as they age; that maintaining connection and relationships benefits everyone through the lifespan.

We believe in a community model where residents' input is valued and integrated into daily decision-making and management.

We commit to supporting residents' efforts to extend their autonomy and independence.

We operate a business model based on mutual respect, transparency, fiscal responsibility and service.

We encourage a culture of economic and social diversity where all residents feel honored, welcomed and supported.





From Board Chair Paula Walker

Dear Friends,

The Hamlet enjoyed another busy year in 2015, full of challenges and successes. I am personally grateful to the many community members and groups who support our mission to provide beautiful, safe, convenient housing for Lopez Island's treasured older residents. As our population ages, I am pleased to see The Hamlet playing an increasingly vital role in our island healthcare infrastructure. In fact, we regularly receive visitors from around the Northwest who hope to create just such a place in their own small communities!

This year we welcomed five great islanders to our Board of Directors, Cathy Doherty, Rick Gadd, Tytti Langford, Jim Orcutt and Bill White. We appreciate their willingness to share their skills, enthusiasm and leadership. Many thanks to out-going board members Randall Dickson, Bruce Ellestad, Karen Gilbert and Nancy Mariotti.

A quick summary of life at The Hamlet in 2015--

The Hamlet Cottages, our leased garden homes for independent seniors who want "less house and more time," have been fully occupied throughout the year and maintain a waiting list. The Gathering Place, our community's "living room", continues to be a busy venue for both public and private events. This year we hosted art openings, lectures, exercise classes and many other fun events. Lorrie Harrison, Cottages Executive Director since 2011, continues to support this vital, vibrant community.

For Hamlet House, 2015 was a year of challenge. During the last few months of 2014 three beloved Hamlet House residents passed away. As it is part of our vision that people living at Hamlet House Adult Family Home can spend their final days surrounded by their family, friends and community, we were honored to have been able to provide comfort and support during this tender time.

Although we did provide respite care and temporary support to a few individuals, despite significant efforts by our staff and Board, occupancy at Hamlet House remained at 50% throughout 2015. Obviously, this unusual situation precipitated financial strain. We are grateful that careful fiscal stewardship during the preceding years of full occupancy gave us a cushion that has so far met our needs. We continue to focus great effort to resolve this situation.

Also significant, Hamlet House experienced a change in administration when late in the year Resident Manager, Nichelle Sorenson, moved off-island for family reasons. We were delighted to welcome our new leadership team, Becky Smith who serves as Manager, Heather Arps, our lead caregiver and Cathy Doherty who is liaison for our Board of Directors. Each of these wonderful women brings years of experience in service to Lopez Islanders' health care—a true “Dream Team.”

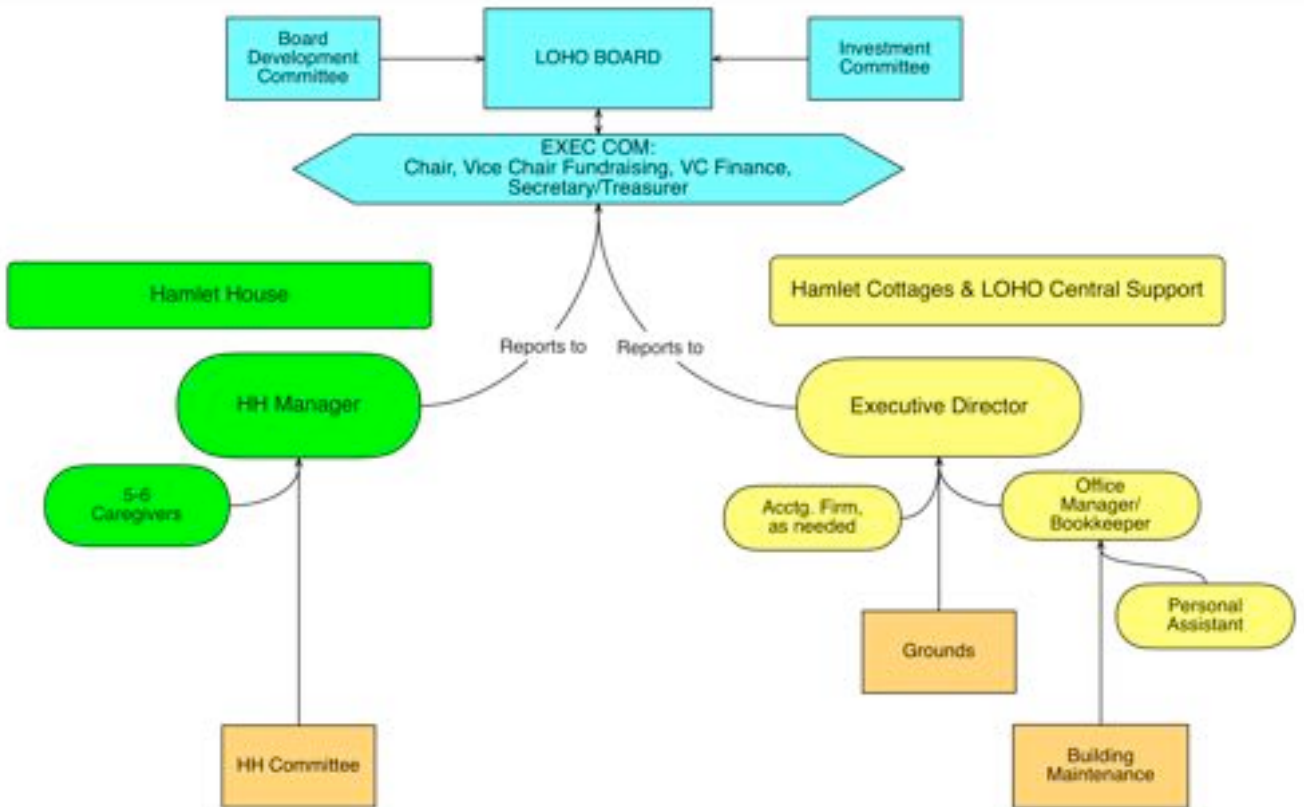
As we embark on a new year together, on behalf of our Board of Directors, I express sincere gratitude to the Lopez Community for their continuing support. Like all non-profits, we rely on fundraising to provide part of the annual revenue that allows us to serve Lopez. Our reality is that, even when the Cottages and Hamlet House are full, fundraising is a necessity. Thank you, thank you, thank you for your generosity in providing that support.

Sincerely yours,

Paula Walker

ORGANIZATIONAL CHART

The Board governs and provides oversight for Hamlet House and the Hamlet Cottages. Our two staff managers are supervised by the Executive Committee. Support services are centralized.



STRATEGIC PRIORITIES

The Board's strategic priorities for 2015 focused on six goals:

1. Provide resident support
2. Seek debt resolution
3. Pursue long-term sustainability
4. Accomplish the fundraising plan
5. Maintain occupancy goals
6. Refine administration practices

1. Provide resident support

a. **Complete the Independence Policy for Cottage residents.** The goal was for staff to co-create an Independence Policy with the cottage residents that would allow residents to continue living at The Hamlet should they lose some physical independence as they age. After nearly two years of development, the policy was finalized and approved by both the residents and the board of directors.

b. **Create a volunteer program for Hamlet House.** In progress.

2. Seek cottage debt resolution

Between 2012 and 2014, mostly through gifting, all but one of the non-secured debts owed to individuals had been resolved. The remaining advancer had previously gifted a portion of money owed, but a balance remained. Following congenial negotiations, a new two-year contract was signed and modest monthly payments are now being made.

Strategic Priorities, continued

3. Pursue long-term sustainability

This goal addresses three areas: finance, board succession and facility maintenance.

a. Finance

1. Bequests. Develop the materials that offer bequest and planned giving guidance to supporters and the public. These materials were completed, are posted on our website and in our Annual Reports, and will be included in the 2016 fundraising campaign.
2. Endowment. In response to a donor's request, our board explored the possibility of establishing an endowment fund for LOHO. The decision was made that donations would be better held in a more liquid form at this time. The research will be helpful when conditions become favorable to establish an endowment.
3. Investments. The board treasurer was tasked with investigating options to invest reserve funds to achieve a greater return, with the proviso that safety was a priority. He recommended that if/when we have funds over and above our operating needs, a committee will be convened to make those investment recommendations.
4. Structured donations. The fundraising committee put together a plan to encourage our major donors to consider making multi-year pledges. This resulted in one new multi-year pledge in addition to the first 5-year pledge made in 2014.
5. Financial Assistance Fund (FAF) for Hamlet House. The FAF, which is funded by donations, provides monthly financial support to residents of Hamlet House who are unable to pay the affordable rate. A committee reviewed and revised guidelines for that program.

b. Board succession

Recruiting new members to our working board is an essential element of sustainability. We are delighted that five outstanding community members joined our Board of Directors: Jim Orcutt, fundraising; Bill White, maintenance, Cathy Doherty and Tytti Langford, Hamlet House liaisons and Rick Gadd who will serve as Treasurer beginning in February 2016.

Strategic Priorities, continued

c. Facility maintenance

This goal was to complete the design of a facilities and funding plan for major long-term maintenance for both the Cottages and Hamlet House. The plan was completed, presented to the Board and accepted. At the end of the year, a donor offered \$5,000 per year for 5 years (total \$25,000) to help fund both reserves beginning April, 2016.

4. Accomplish the fundraising plan

As with most non-profits, fundraising is a crucial part of the Hamlet's financial stability. Even with the Cottages at full occupancy, revenues fall short of expenses primarily due to the fact that 7 of the 14 cottages are leased at an "affordable" rate set in conjunction with San Juan county. In 2015, our goal of raising \$30,000 represented 11% of budgeted revenues for the Cottages.

Thanks to our extremely generous, committed donors, we were able not only to meet that goal, but exceed it. Including 100% participation by our Board of Directors, \$44,700 was donated.

In addition to the annual fundraising campaign, \$5,860 was donated through In Memoriam gifts to Hamlet House, grants and other donations.

Total giving to The Hamlet was \$50,560.

5. Maintain occupancy at goals

a. Cottages

Based on a strong occupancy history in 2014, the occupancy target for 2015 was set at 91%. This was surpassed, with an actual 2015 occupancy of 96%. Most months were 100%. The wait list for both 1- and 2-bedroom cottages is robust.

b. Hamlet House

The occupancy goal of 91% was set for 2015. During the last few months of 2014 three Hamlet House residents passed away. Despite outreach and marketing, these openings went unfilled in 2015. This created significant financial strain. Fortunately, careful fiscal stewardship during years of full occupancy gave us a cushion that met our needs. We continue efforts to reach seniors that need our services and are working toward returning to full occupancy.

Strategic Priorities, continued

6. Refine Administrative Practices

Review financial management of LOHO

Three board members and office administrator Liz Malinoff worked together to redefine and refine the financial responsibilities of the LOHO staff and board.



The Hamlet Board of Directors

Front row (left to right): Paula Walker, Rebecca Chao, Marlene Geidd-Clark, Tytti Langford

Back row: Rick Gadd, Kirm Taylor, Jim Orcutt, Florence Wagner, Bill White

Not available for photo: Cathy Doherty, Mary Wondra, Charlie Janeway

From the Cottage Residents

Residents take an active role in Cottage life. Working closely with the Executive Director, they offer input that helps shape Cottage policies, decisions and activities. They also take a very active role in Lopez Island events.

Cottage Residents Give Back to the Lopez Community in 2015

Residents volunteered time and talents to the following Lopez Island organizations:

- Lions Club
- Lopez Community Trails Network
- Lopez Island Library
- Lopez Island Family Resource Center
 - Fresh Food Distribution, Mentor Program, Children’s Center
- Grace Church
 - Outreach Committee and Food Bank
- Community Center
- Transitions Movement
- L.I.F.E. School Food Program
- LOHO Board
- Lopez Community Land Trust Board & Executive Committee
- Rural Arts Cooperative
- Domestic Violence Sexual Assault Services Board
- Hamlet Cottage Resident Council
- Garden planting and cleanup of the Hamlet campus
- Routine repair and maintenance of Hamlet Cottages & Gathering Place

Residents Ted Phillips and Felicity Green, supported by the whole Cottage “crew,” took home a trophy for their entry in this year’s Trashion Fashion fundraiser for the Lopez Island Solid Waste District.





Cottage residents enjoy their porch swing that was built and donated by Fred Fickenworth, shown standing at right with his wife Sylvia.

Cottage Residents' 2015 Objectives

Objective 1: Encourage socialization and cohesiveness among cottage residents by sponsoring several events and encouraging residents to develop their own less formal community activities.

Events included a farewell cocktail party for a board member / cottage resident, a welcome tea for two new residents, a farewell tea for two residents and a soup supper for four new residents.

The Resident Council organized or supported these activities for the community:

1. A resident arranged for Direct TV service in the Gathering Place so residents could watch sports events together
2. Residents agreed to unlock and lock the Gathering Place doors each day to encourage a sense of welcome and inclusion
3. A resident purchased copies of *The Seattle Times* and *The New York Times* for all the community to enjoy each morning in the Gathering Place
4. Resident-sponsored events included:
 - Cinco de Mayo party (complete with margaritas and plastic mustaches)
 - A fish and crab feed, seafood supplied by a board member
 - Elegant sit-down luncheon for the Executive Director's 65th birthday
 - Summer lemonade party on the patio
 - Christmas tree decorating afternoon with homemade cider and cookies
 - New Year's Eve party

Objective 2. Continue to work with Lopez emergency personnel and Hamlet House staff to identify and refine emergency procedures for cottage residents.

Residents reviewed their emergency plan which included instructions for staying safely in the cottages as well as an evacuation plan. The Lopez District #4 Fire Chief came to review procedures and offer suggestions.



Heather Gladstone speaks about her photography exhibit in the Gathering Place. More than 60 guests attended her reception.

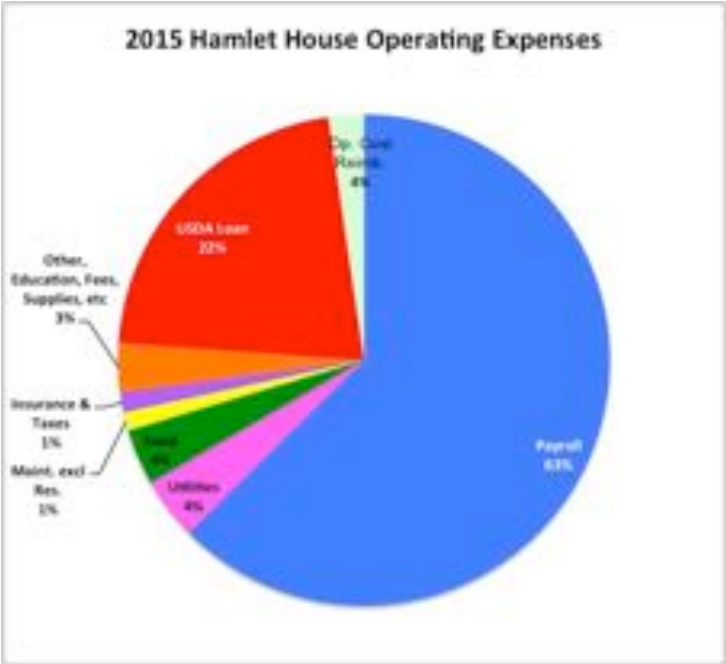
FINANCIAL COMMENTS

The two LOHO programs have separate budgets. The USDA loan stipulates that Hamlet House funds are not available to the Cottages other than reimbursement for operational support. 2015 assessed valuation for the two properties combined is \$2,705,800. Hamlet House assessment: \$770,800; Cottages and Gathering Place assessment: \$1,935,000.

HAMLET HOUSE

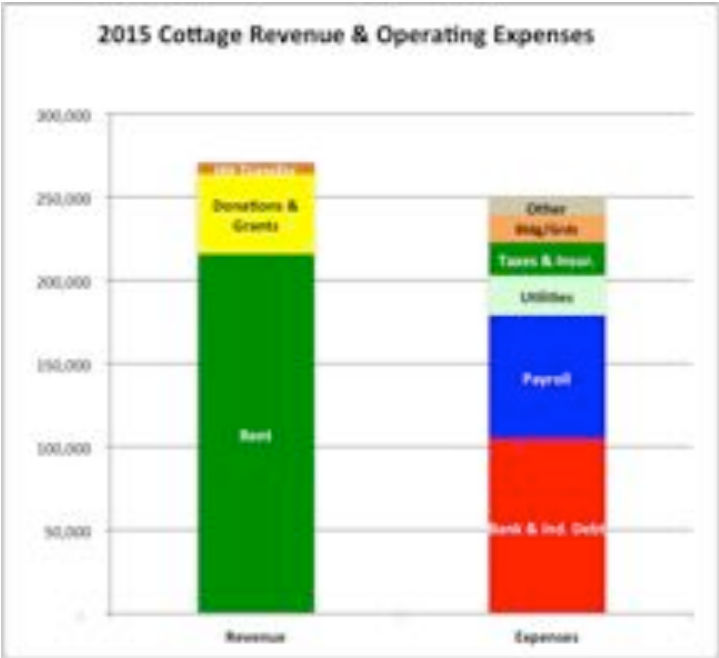
Throughout most of 2015, the Hamlet House was half full. Hamlet House expenses are paid from rent revenues so Hamlet House savings were used to cover the shortfall. Since 99% of Hamlet House revenues come from resident rent, only expenses are shown.

Hamlet House maintains a Financial Assistance Fund (FAF). The FAF is used to subsidize the rent for a qualified resident needing financial assistance. The Dec. 31, 2015 fund balance was \$16,132.



COTTAGES

Nearly 100% occupancy paired with a successful fundraising program enabled the Cottages to cover all expenses from current revenues and add to savings. Main categories of expenses are shown in the chart; "Other" expenses include marketing, supplies, event costs, professional fees, internet, phone, etc.





Hamlet House Adult Family Home Report

Financial challenges at Hamlet House in 2015 were caused by 12 months of 50% occupancy. Operating revenues were drawn from reserves generated from prior years of full occupancy.

Marketing and outreach continue by Board and staff in an effort to reach those who need compassionate, attentive care and support. While many of those we serve are islanders whose health circumstances have changed, others move to Hamlet House from the mainland to live near their adult children and grandchildren.

Becky Smith was hired as manager in November, 2015. A former registered nurse, Becky has been very active as a Lopez School Board member, Fire Commissioner and President of the Chamber of Commerce and has served on numerous volunteer boards. Becky has been interested in eldercare for decades and once looked into opening her own adult family home.

One of Becky's first accomplishments was to restructure staffing and recruit long-time Lopez caregiver Heather Arps. Heather brings more than 27 years of experience caring for Lopez elders to Hamlet House. About the same time, Cathy Doherty retired from her position as Nurse Practitioner at Lopez Clinic and joined our Board of Directors. As a volunteer, Cathy works closely with Becky and Heather. No question our residents are getting the very best of care with this capable trio at the helm.

Hamlet House been recognized for its high level of professionalism and beautiful, nurturing environment. Our staff provides round-the-clock staffing and services that include three home-cooked meals each day, snacks, laundry, housekeeping, medication supervision and assistance with daily needs which can be anything from helping residents stay in touch with family members on Facebook to arranging visits.



Cathy Doherty, Heather Arps and Becky Smith lead the Hamlet House team.





HAMLET COTTAGES REPORT

The Hamlet Cottages had another banner year. With occupancy averaging 96% we ended 2015 on strong financial footing and are pleased to have a waiting list. Our fourteen 1- and 2-bedroom garden cottages are offered for lease to independent folks age 55 and over. Half of these cottage homes are reserved for those living on modest incomes.

A few highlights of 2015:

~One of our cottages was featured on the Lopez Home Tour! What a delight to invite visitors and friends into this very beautiful community of vibrant, interesting islanders.

~Art openings, lectures, parties, meetings and music filled The Gathering Place, our residents' "extended living room."

~High-speed fiber was installed for residents and staff. Hooray!



Lorrie Harrison, Executive Director



THANK YOU TO OUR SUPPORTERS

There are many opportunities to support worthy causes on Lopez Island, and we appreciate that many islanders give their time, energy and talents to us! In particular this year we give special thanks to Fred Fickenworth for building and donating our porch swing; Jesus Coro who continues to volunteer extra hours beautifying our grounds; Barbara Nason and Carolyn Woodbury for their support in financial matters; Peggy Means for taking Hamlet House residents to Creaky Yoga every week, David Bill and Midnight's Farm for garden chips; resident Jim Yalden and board member Kirm Taylor whose talents as volunteer handymen are unsurpassed, and finally to Trevor Bryant and Dave Savage who spend some 30 hours every year (since 2008!) mowing and trimming our Hamlet Green.



Trevor and Dave

APPRECIATION TO 2015 DONORS

With great gratitude we acknowledge all those who made financial gifts to The Hamlet. In addition to Hamlet board members, the following individuals and organizations donated to our success this year.

Lopez Thrift Shop, Lopez Lions, The United Way, the congregation of Grace Church, Lopez Island Hospice and Home Support, The Ramsey-Shirk Fund of the Community Foundation for Monterey County

Larry and Mary Ann Bailey
Inez Black and Wayne Schuh
James and Nancy Caleshu
Melva Cummings
Janice DeLacy
Larry and Sarah Eppenbach
Todd Goldsmith and Diane Dear
Patsy and Shel Haber
Steve and Michele Heller
Pat and Mary Ellen Hughes
Sara Jane Johnson
Mac and Tytti Langford
George and Stepper LeBoutillier
Kathleen Lindenbaum
Gale McCallum
Nancy Mariotti
Tim Maxon and Don Smith

Howard and Vivian Pearce
Ted Phillips
Edna Sayles
Bette Shuh
Rick Strachan and Ginni Keith
Janice Sunitsch
Murray and Mariette Trelease
Rip and Julie Van Camp
Linda Vorobik
Raiti Waerness
Gwendolyn Wharton
John and Carol Whetten
James and Joanne Wiseman
George and Carolyn Woodbury
Ross and Anne Worley

APPENDIX A

LOHO 2015 BOARD OF DIRECTORS AND ADMINISTRATIVE STAFF

Paula Walker, Chair

Full-time Lopez Island resident since 2009. Master's degree in library science from the University of Oregon. Taught middle school and was technical librarian first for Pepperdine Law School and then for Portland General Electric Company.

Rebecca Chao, Vice-Chair, Finance

Active in Pacific Northwest public finance for over 35 years as a financial advisor and an investment banker, most currently retired from Seattle-Northwest Securities Corp. From 1989 through 2007, owner and President of Regional Financial Advisors, Inc. (sold to SNW). Other employers included Shearson-Lehman Brothers, E.F. Hutton, First National Bank (now Wells Fargo), Government Finance Associates, Public Financial Management, Clements & Marshall (owner) and Oregon State Treasury. Began as a computer programmer. Has served on a number of non-profit boards.

Charlie Janeway, Vice-Chair, Fundraising

Amherst College. University of Rochester School of Medicine; rotating internship at Harborview Hospital in Seattle; internal medicine at University of Washington. Gastroenterologist at Group Health Cooperative of Puget Sound, 1970-2008 – administrative responsibilities included Chief of Internal Medicine Department, Chief of Gastroenterology Section, Chair of Pharmacy and Therapeutics Committee, and member of the Executive Committee of the Medical Staff.

Mary Wondra, Secretary / Treasurer

Thirty-five year career in administrative, clerical and managerial positions in stock brokerage, insurance administration and claims, physician office, academic medicine, attorney office. Owner, escrow business. Volunteer for Lopez Community Center, Friends of the Library, Fisherman Bay Water Association, Lopez Community Land Trust, Friends of Woodman Hall, Lopez School.

Cathy Doherty

Lopez resident since 1990. BS in Nursing from the University of San Francisco, 1970; Masters in Nursing, University of Washington, 1980. On staff as Nurse Practitioner at Lopez Clinic 1992 – 2015. Raised her four children on Lopez and now has four grandchildren on the island. Foster parent 1994 – present.

Rick Gadd

Grew up in Michigan and California. BA in Management Science from San Francisco State. US Air Force. Federal Government administrator and manager for 35 years, 17 years with the National Park Service (Yosemite, Fort Vancouver, Craters of the Moon, Coulee Dam, Mount Rainier, Everglades) and 18 years with Bonneville Power Administration, Portland, OR. Full-time resident on Lopez since November 1999. Has served on a number of San Juan County and Lopez non-profit boards.

Marlene Giedd-Clark

Born in a farm community north of Sedro Woolley; raised in Ketchikan, Alaska. B.A from Whitworth College and masters degrees in Special Education from University of Northern Colorado and in Learning Disabilities from Oregon College of Education. Taught elementary school, high school science and special education for 26 years in Alaska, Colorado, Oregon and Washington. Built on Lopez Island in 1988; moved to California in 2009; returned to Lopez in 2014. Hamlet Cottage resident.

Tytti Langford

RN and Surgical Nurse Specialist in Helsinki, Finland; Orthopedic Physician Assistant in California. A property owner on Lopez since 1972, Tytti has been a full time resident since 1993. She held the position of Lopez Island Medical Clinic manager from 1993 until 2004. She one of the original Hamlet House founders, she now serves as Hamlet House liaison for the Board of Directors. Main interests: the environment and eldercare.

Jim Orcutt

PhD in Pharmacology and MD from University of Colorado. Ophthalmology residency at University of Washington. Clinical Specialties: orbital surgery, neuro-ophthalmology and oculoplastic surgery. Professor of Ophthalmology, University of Washington. Before retirement, Jim was Chief of Ophthalmology to the Seattle Veterans Administration Medical Center and Chief Surgical consultant providing oversight for all VA surgical operations in Washington, Oregon, Idaho and Alaska. Director of the American Board of Ophthalmology, 2003 to 2011. Enjoys restoring cars and motorcycles, woodworking, machining and NW history.

Kirm Taylor

University of Rochester, BA History. University of Michigan, MSW. Social worker in New York and Michigan; twenty-two years as real estate broker in Seattle, WA. Thirteen years as general contractor. Founding member, Lopez Community Trails Network; treasurer of Lopez Island Community Tennis Association.

Florence Wagner

Formative years in East Grand Rapids, Michigan, followed by University of Michigan, where she received a degree in nursing. Main area of expertise: pediatrics. Practiced in San Francisco, Grand Rapids and Ann Arbor, Michigan. Resident of Hamlet Cottages.

Bill White

Raised in Manhattan Beach, California where he learned to sail, surf and build houses. In his late teens he traveled the world to perfect these skills. After a stint in the marine industry, he went into project management of residential and commercial construction in the Southeast. Relocating to the Northwest, Bill got his real estate license, constructed and renovated homes. He operated a jazz club in Everett, WA, and directed a Seattle Seaport project to maintain and restore four historic ships including the Arthur Foss Tug; Director of Homes for Islanders on San Juan Island; original Project Administrator for Lopez Hamlet; Project Manager of Patos Island Lighthouse Restoration.

ADMINISTRATIVE STAFF

Cottages Executive Director: Lorrie Harrison

Executive Director of Hamlet Cottages since Dec. 2011. Senior Marketing Representative for Walt Disney World Company, Orlando, Florida 1972 - 1980. Co-Director of a large non-profit in Orlando, then returned to Disney as Seminar Productions designer and presenter. Independent marketing consultant, 1989 - 2011. Published author.

Hamlet House – Administrator: Becky Smith

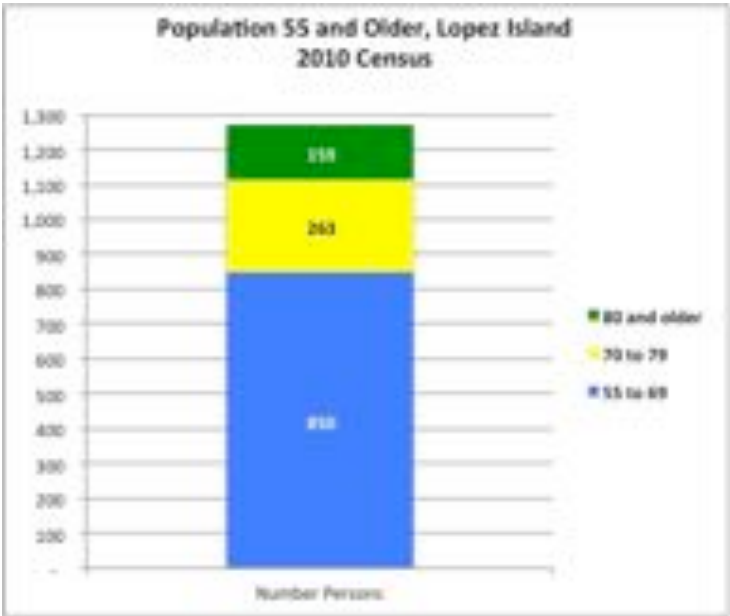
Administrative head of Hamlet House since 2015. Nursing Degree from Merritt Hospital School of Nursing in Oakland, CA. Came to Lopez in 1984 and worked as a visiting nurse and as health educator at Lopez school for 10 years. Very active in the community as a School Board member, Fire Commissioner and Chamber of Commerce President as well as service on numerous volunteer boards.

APPENDIX B: LOPEZ ISLAND DEMOGRAPHICS: 2010 CENSUS

Based on the 2010 census, the following chart provides demographic data indicating our potential market numbers.

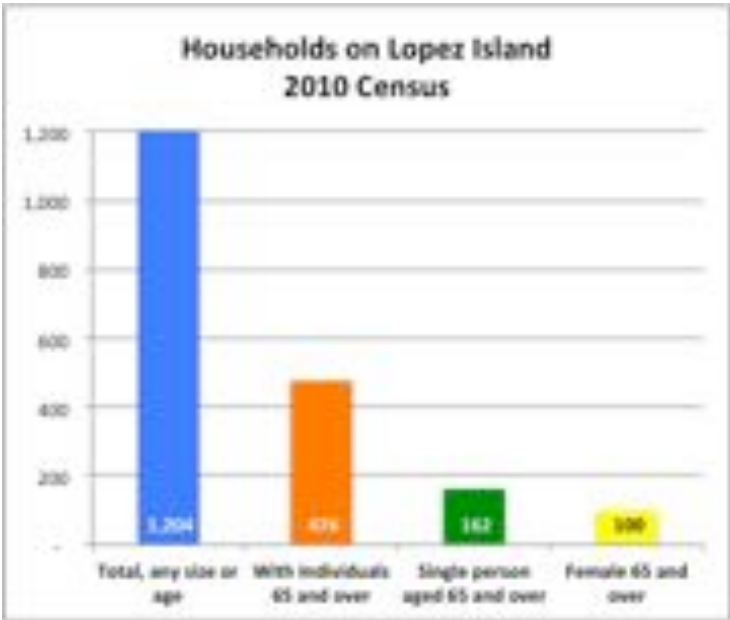
POPULATION

The total 2010 population of Lopez Island was 2,383. The chart shows three age ranges pertinent to LOHO.



HOUSEHOLDS

The total number of households on Lopez Island in 2010 was 1,204. The chart below indicates the number of households with individuals 65 and over, single persons aged 65 or older and, of those persons living alone, how many were female 65 and over.



APPENDIX C

IMPORTANT HAMLET/LOHO DATES

May 22, 2003	LOHO Articles of Incorporation filed
2004	LOHO “Year of Formation” on tax return (Form 990). The first tax return for LOHO was year 2004, so that is the date of formation.
April 27, 2004	First official meeting of the LOHO Board; Received 501(c)(3) designation
December 15, 2004	LOHO Bylaws adopted
Jan-Feb 2006	Building permit hearing, then decision with Findings and Conditions from San Juan County hearing examiner. Conditions included a requirement that 7 independent units be “moderate income” affordable (HUD definition)
September 27, 2006	USDA approved HH request for 40-year loan of \$998,000
June 18, 2007	\$1,500,000 business loan and promissory note with Islanders Bank for the Cottages construction, due 7/15/2038
November 2007	Board approved Gathering Place funding plan (\$222,000 bequest was applied to GP construction costs)
August 2008	Cottages open, first residents move in
Early 2009	Hamlet House welcomes first residents
August 2010	Board removed the Cottages’ \$250,000 entrance deposit requirement
December 2011	Board hires first Cottages executive director

APPENDIX D: GUIDE TO GIVING

There are a multitude of reasons we are grateful for our community, and donors' generosity is on the top of the list. As with most non-profit organizations, donations make our very existence possible. We are delighted that, partnering with you, Lopez islanders are empowered to live out their lives in the community they love. *The financial support of donors renews that dream every year.*

There are many ways you can help. Whether yours is a monthly donation, a one-time gift, an annual donation, bequest, or contribution to our new endowment fund, your generosity makes a powerful difference. All gifts to The Hamlet are tax deductible.

Giving Made Easy

We are happy to answer questions you or your advisors may have about making a gift or setting up a giving plan. The process is not difficult. Simply contact Executive Director Lorrie Harrison at (360) 468-2620 or Board Chair Paula Walker (360) 468-3397.

MONTHLY PLEDGES For those who like to contribute regularly, it is easy to arrange a monthly donation through your credit card or scheduled withdrawal from your bank account.

TRIBUTE GIFTS: HONORING SOMEONE SPECIAL OR A SIGNIFICANT EVENT

Tribute gifts are a meaningful way to celebrate a special occasion, recognize a significant person in your life or pay tribute to a departed friend or loved one. We will send a personal letter to the honored individual or family member explaining how your donation will benefit Lopez elders.

LEGACY GIVING: BEQUESTS Making a charitable bequest in your will is the easiest legacy gift to establish. The following language offers options for you and your attorney to consider:

"I hereby give, devise and bequeath to Lopez Housing Options (LOHO), a non-profit charitable organization located in San Juan County, WA, federal tax ID #76-0732680, (the sum of \$____) or (____ percent of my estate) or (specific items of property)

OR

(indicate a specific dollar amount) or (all of the rest, residue and remainder of my estate) as an unrestricted gift to be used at the discretion of its Board of Directors who may determine how best to apply such gift towards the work of The Hamlet (or list a specific purpose)."

MORE LEGACY GIVING OPTIONS Naming Lopez Housing Options as a beneficiary of your Individual Retirement Account; other retirement account; life insurance policy; establishing a Remainder Interest; or setting up a Life Estate Gift will create a lasting contribution in your name. Feel free to call us for specifics.