JULY 2026 PROPOSED FINAL

The Village at Rockville

A National Lutheran Community

DISCLOSURE STATEMENT-EXHIBIT K

THE VILLAGE AT ROCKVILLE, INC. (TVAR)
9701 Veirs Drive
Rockville, MD 20850

07/30/2026

THE ISSUANCE OF A CERTIFICATE OF REGISTRATION DOES NOT CONSTITUTE APPROVAL, RECOMMENDATION, OR ENDORSEMENT OF THE FACILITY BY THE MARYLAND DEPARTMENT OF AGING, NOR IS IT EVIDENCE OF, OR DOES IT ATTEST TO, THE ACCURACY OR COMPLETENESS OF THE INFORMATION SET OUT IN THE DISCLOSURE STATEMENT.

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<u>Provider</u>
The Village at Rockville, Inc.
A National Lutheran Community
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Rockville, Maryland 20850
Phone: 301-424-9560

<u>Parent</u>
National Lutheran Inc.
5275 Westview Drive, Suite 110
Frederick, MD 21703
Phone: 301-354-2710
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The Village at Rockville, Inc. (TVAR) is a not-for-profit corporation, affiliated with National Lutheran Inc. dba National Lutheran Communities and Services (NLCS), a faith-based not-for-profit ministry partner of the Metropolitan Washington DC and Delaware-Maryland Synods of the Evangelical Lutheran Church in America (ELCA), serving people of all beliefs. TVAR shall be fully responsible for its fiscal affairs including any liabilities and debts it may incur. NLCS's affiliation with the ELCA shall not obligate the ELCA to assume any liabilities and debts incurred by TVAR.

TVAR owns all of the buildings that make up the community and the land on which they are located. All services and facilities of TVAR are available to every resident equally without regard to race, color, national origin, or the plan under which admitted. TVAR was incorporated in the District of Columbia on Dec. 13, 1890, and reincorporated on Jan. 15, 1903. TVAR is a not-for-profit, federally tax-exempt organization, as defined in section 501(c)(3) of the Internal Revenue Code. The campus consists of a 160-bed skilled nursing facility (SNF), a 50 unit/57 resident capacity assisted living facility (AL), and the 241-unit independent living community.

The Interim Executive Director of TVAR is Craig Wagoner~~.~~

INDEPENDENT LIVING (IL)

INDEPENDENT LIVING ENTRANCE FEES:

Please read the Residence and Services Agreement carefully for the conditions that must be satisfied before TVAR is required to pay the entrance fee refund, if applicable.

The IL entrance fee is the fee governing the right to occupy the unit. Pricing varies based on unit style, size and entrance fee refund option selected and are subject to change.

If a resident is admitted to AL or SNF from IL for healthcare services, the IL resident pays TVAR's published rates, unless covered by Medicare, Medicaid, or other third-party insurance.

TVAR currently offers three entrance fee refund options: 1) Traditional Entrance Fee, 2) 50% Refundable Entrance Fee, and 3) 80% Refundable Entrance Fee.

Please refer to the Residence and Services Agreement for additional information, including the timing of when entrance fee refunds are payable.

> Traditional Entrance Fee - The refund amount is the entrance fee minus 10% administrative fee and minus 3.75% per month for 24 months commencing on the occupancy date until the termination date. The refund shall be made in accordance with Sections VII and VII of the agreement.
>
> 50% Refundable Entrance Fee – The refund amount is the greater of: (i) 50% of the entrance fee or (ii) entrance fee less 10% administrative fee less 1.67% of the entrance fee each month (or portion thereof) between occupancy date until the agreement is terminated, limited to approximately 24 months. The refund shall be made in accordance with Sections VII and VII of the agreement.
>
> 80% Refundable Entrance Fee - The refund amount is 80% of the Entrance Fee paid (and, for the avoidance of doubt, no deduction of the administrative fee). The refund shall be made in accordance with Sections VII and VII of the agreement.
>
> Please note, in 2026, the Ninety Percent (90%) Refundable Entrance Fee is available to clients who executed the Independent Living Future Resident Agreement on or before 12/31/2024. Upon termination of this Agreement for any, including death, after occupancy, a Ninety Percent (90%) Refundable Entrance Fee Resident or Resident's estate is entitled to a refund of the Entrance Fee paid (after deducting the 10% Administrative Fee) subject to any additional charges outstanding and owing to the Corporation through the effective date of termination. The refund shall be made in accordance with Sections VII and VIII of the agreement.

Entrance fees are deposited in the operating cash account and may be used by TVAR for purposes unrelated to the construction, operation, maintenance, or improvement of the community, including for the furtherance of TVAR's corporate mission, to distribute profits, or to benefit an affiliated community. All refunds are paid in accordance with the terms set forth in the Residence and Services Agreement from the same account.

The Residence and Services Agreement remains in force while the resident resides in all levels of service at TVAR. Please review the Agreement for additional information related to termination provisions.

The IL unit always remains the property of TVAR. The resident may continue to reside in an IL unit as long as the resident is able to live independently, and the Residence and Services Agreement remains in force. Should a resident die in tenancy, a surviving co-resident may remain in the unit if able to live independently.

For prospective residents, 10% of the entrance fee is payable when the Residence and Services Agreement, the contractual agreement between TVAR and the depositor, is signed. The remaining 90% is payable when TVAR notifies the resident that the unit is ready for occupancy or simultaneously with occupancy, whichever is earlier.

TVAR offers independent living cottage homes and apartment homes. Unit descriptions and pricing effective January 1, 2026, subject to adjustment, are as follows:

2026 RATES

Independent Living Cottage Homes

Residence	Home Style	Sq Ft	Traditional Declining	50% Refundable	80% Refundable	Monthly Service Fee	Campus Location
Mulberry-Wescott I	2 bed, 1 bath	947	$329,870	$428,820	$560,770	$2,933	Wescott I/ East
Sycamore-Wescott I	2 bed, 1 bath	891	$329,870	$428,820	$560,770	$3,018	Wescott I/ East
Aspen-Wescott I	2 bed, 1 bath	930	$329,870	$428,820	$560,770	$3,088	Wescott I/ East
Rockport-Wescott II	2 bed, 1 1/2 bath	1,098	$493,590	$641,670	$839,100	$3,163	Wescott II/ East
Stone Haven-Westcott II	2 bed, 2 bath	1,271	$579,940	$753,920	$985,900	$3,243	Wescott II/ East
Sunnydale-Wescott II	2 bed, 2 bath, sunroom	1,419	$610,640	$793,830	$1,038,090	$3,318	Wescott II/ East
Second Person Fee			$15,600	$20.800	$31,000	$1,200	

2026 RATES
Independent Living Apartment Homes

Residence	Home Style	Sq Ft	Exterior Sq Ft	Traditional Declining Starting at	50% Refundable Starting at	80% Refundable Starting at	Monthly Service Fee
The White Oak	1 bed, 1 bath	737	60	$364,060	$473,280	$618,910	$2,358
The Carderock	1 bed, 1 bath	748	0	$362,410	$471,130	$616,110	$2,393
The Crescent I & II	1 bed, 1½ bath	821	144	$409,850	$532,800	$696,750	$2,623
The Crescent III & IV	1 bed, 1½ bath	862	60	$424,750	$552,170	$722,060	$2,758
The Grove I	1 bed, 1½ bath	888	144	$442,400	$575,110	$752,080	$2,838
The Grove II	1 bed, 1½ bath	888	0	$430,260	$559,340	$731,440	$2,838
The Seneca I	1 bed, 1½ bath	898	144	$446,800	$580,850	$759,570	$2,873
The Seneca II	1 bed, 1½ bath	898	0	$435,230	$565,790	$739,890	$2,873
The Monocacy I & II	1 bed, 1½ bath	906	60	$446,250	$580,130	$758,640	$2,898
The Meadowside I	1 bed, 1½ bath	906	144	$450,670	$585,870	$766,140	$2,898
The Meadowside II & III	1 bed, 1½ bath	906	60	$446,250	$580,130	$758,640	$2,898
The Sandy Spring I & II	1 bed, 1½ bath	1,005	0	$487,070	$633,200	$828,030	$3,213
The Rock Hill I & II	1 bed, 1½ bath w/den	1,010	60	$496,450	$645,390	$843,970	$3,228
The Waters I	1 bed, 1½ bath w/den	1,109	144	$549,410	$714,230	$933,990	$3,543
The Waters II	1 bed, 1½ bath w/den	1,147	60	$562,650	$731,440	$956,500	$3,668
The Henson I & II	2 bed, 2 bath	1,173	216	$586,370	$762,280	$996,790	$3,753
The Henson III, IV & V	2 bed, 2 bath	1,173	60	$575,340	$747,940	$978,070	$3,753
The Croydon	2 bed, 2 bath	1,205	116	$590,780	$768,020	$1,004,330	$3,853
The Lewis I	1 bed, 1½ bath w/den	1,239	168	$612,290	$795,980	$1,040,900	$3,963
The Lewis II	1 bed, 1½ bath w/den	1,239	80	$607,330	$789,530	$1,032,460	$3,963
Second Person Fee				$15,600	$20,800	$31,200	$1,200

2026 RATES

Independent Living Apartment Homes

Residence	Home Style	Sq Ft	Exterior Sq Ft	Traditional Declining Starting at	50% Refundable Starting at	80% Refundable Starting at	Monthly Service Fee
The Cabin John I & II	2 bed, 2 bath	1,261	78	$617,810	$803,150	$1,050,280	$4,033
The Magnolia I	2 bed, 2 bath w/den	1,261	144	$622,770	$809,610	$1,058,720	$4,033
The Magnolia II	2 bed, 2 bath w/den	1,261	60	$617,810	$803,150	$1,050,280	$4,033
The Bennett I	1 bed, 1½ bath w/den	1,273	168	$628,850	$817,490	$1,069,040	$4,073
The Bennett II	1 bed, 1½ bath w/den	1,273	80	$623,880	$811,040	$1,060,590	$4,073
The Sugarloaf I	2 bed, 2 bath w/den	1,290	144	$637,110	$828,260	$1,083,100	$4,128
The Sugarloaf II	2 bed, 2 bath w/den	1,290	60	$632,150	$821,800	$1,074,650	$4,128
The Kingsbury	1 bed, 1½ bath w/den	1,304	63	$638,770	$830,410	$1,085,910	$4,173
The Brookside I & II	2 bed, 2 bath	1,334	98	$653,660	$849,760	$1,111,230	$4,263
The Brookside III & IV	2 bed, 2 bath	1,334	60	$653,660	$849,760	$1,111,230	$4,263
The Quince Orchard	2 bed, 2 bath	1,416	152	$697,800	$907,130	$1,186,260	$4,528
The Hickory I & II	2 bed, 2 bath w/den	1,519	96	$743,030	$965,930	$1,263,140	$4,858
The Hickory III & IV	2 bed, 2 bath w/den	1,519	60	$743,030	$965,930	$1,263,140	$4,858
The Takoma	2 bed, 2 bath w/den	1,576	60	$770,610	$1,001,790	$1,310,040	$5,038
The Vista	2 bed, 2 bath w/den	1,602	406	$793,780	$1,031,910	$1,349,420	$5,123
The Cedar	2 bed, 2 bath w/den	1,607	100	$786,050	$1,021,870	$1,336,290	$5,138
The Twinbrook I & II	2 bed, 2 bath w/den	1,607	60	$785,500	$1,021,140	$1,335,350	$5,138
The Lakeview	2 bed, 2½ bath w/den	1,736	479	$858,860	$1,116,520	$1,460,080	$5,553
The Overlook	2 bed, 2½ bath w/den	1,786	254	$883,140	$1,148,080	$1,501,330	$5,713
Second Person Fee				$15,600	$20,800	$31,200	$1,200

Pricing is effective January 1, 2026 and is subject to change.

**Entrance fee descriptions can be found on the back. Pricing may vary based on location and view.*

2026 RATES
The Villas at The Village at Rockville

Residence	Home Style	Sq Ft	80% Refundable	Monthly Service Fee
Lakewood	2 bed, 2.5 bath w/den	1,302	$1,063,000*	$4,123
Woodmont	2 bed, 2.5 bath	1,212	$1,045,280*	$3,888
Avenel	2 bed, 2.5 bath w/sunroom	1,455	$1,168,110*	$4,655
Congressional	2 bed, 2.5 bath w/den	1,470	$1,200,155*	$4,668
Second Person			$31,200	$1,200

**Villa pricing may vary based on location and view.*

Cottage to Villa Renovation Project:

Throughout the history of The Village at Rockville (TVAR), we have experienced several transitions in our service offerings to residents, from traditional nursing home (semi-private to private rooms), assisted living, memory care, independent living cottages and most recently, independent living apartments). Each of these variations impacted the residents who lived in the community at that time, but each of these decisions was made with thoughtful consideration to the future viability of TVAR. The repositioning of the cottages to Villas is no different.

TVAR strives to provide desired and suitable accommodations for its diverse resident community. It endeavors to stay abreast of changing senior community patterns. That entails taking stock of options available to those looking to transition into continuing care communities. Today's independent living seniors wish to duplicate, as much as possible, the feel of their former home when choosing the next location in their journey. In 2021, TVAR brought apartment living to its campus through construction of The Glenmere, thus giving choice of either cottage or apartment lifestyle. In 2023, after market studies, TVAR decided to take another step in its options with the construction of the Villas. Strong business and ministry operators consistently monitor industry trends to continuously improve service offerings to maintain client satisfaction and grow their business. The cottage-to-Villa repositioning will advance the mission, strengthen financial performance, and increase occupancy.

Historically, the independent living cottages consisted of three connected homes. The triplexes represent typical construction tastes from when they were built. However, the one-bedroom, one-bath models within the cottages have generated ongoing census challenges, as older adults interested in life plan communities now desire more spacious two-bedroom, two-bath models. It is imperative that those triplex cottages be renovated to reflect more spacious models offering more functional duplex floor plans to appeal to future residents. Those cottages chosen for the remodeling will be done in phases, first re-settling those whose cottage will be revamped. Choosing of the triplexes will be purposeful, first selecting empty triplexes or those with just one resident.

Reservation agreements and deposits for the Villas became available in September 2023. Phase I began in January 2024 with additional phases occurring subsequent to its completion.

IL entrance fees for The Villas are as follows:

Year	Congressional	Avenel	Lakewood	Woodmont	
2024			982,804	966,419	(90% Ref.)
2025			1,022,120	1,005,080	(80% Ref.)
2026	1,200,155	1,168,110	1,063,000	1,045,280	(80% Ref.)

IL entrance fees for cottages for the prior five years are as follows:

Year	Cedarcrest	Willow	Mulberry Sycamore Aspen	Rockport	Stone Haven	Sunnydale	
2021	240,665	249,704	258,742	329,925	387,519	431,614	(Trad.)
2021	300,831	312,130	323,428	412,407	484,436	538,777	(50% Ref.)
2021	348,963	362,071	375,176	478,391	561,946	625,841	(90% Ref.)
2022	250,292	259,692	269,092	343,122	403,051	448,879	(Trad.)
2022	312,864	324,615	336,365	428,903	503,813	560,328	(50% Ref.)
2022	362,922	376,554	390,183	497,527	584,424	650,876	(90% Ref.)
2023	260,100	270,300	279,990	357,000	419,220	446,650	(Trad.)
2023	312,120	324,360	335,990	428,400	503,065	559,980	(50% Ref.)
2023	416,160	432,480	447,985	571,200	670,750	746,640	(90% Ref.)
2024	283,560	294,780	304,980	431,460	506,940	564,570	(Trad.)
2024	368,630	383,215	396,475	560,900	659,020	733,950	(50% Ref.)
2024	482,050	501,125	518,465	733,480	861,800	959,770	(90% Ref.)
2025			317,180	474,610	557,630	587,150	(Trad.)
2025			412,330	616,990	724,920	763,300	(50% Ref.)
2025			539,200	806,830	947,980	998,160	(80% Ref.)
2026			329,870	493,590	579,940	610,640	(Trad.)
2026			428,820	641,670	753,920	793,830	(50% Ref.)
2026			560,770	839,100	985,900	1,038,090	(80% Ref.)

IL entrance fees for apartments for the prior four years are as follows. Please note apartments were not available prior to 2021:

Entrance Fees							Entrance Fees									Entrance Fees		
Refund Option: Traditional Declining							**50% Refund Option**						**80% Refund Option**			**90% Refund**		
Apartment Types	**2026**	2025	2024	2023	2022		**2026**	2025	2024	2023	2022		**2026**	2025		2024	2023	2022
The White Oak	364,060	350,060	336,600	311,796	311,796		473,280	455,080	437,580	388,200	388,200		618,910	595,110		572,220	449,323	449,323
The Carderock	362,410	348,470	335,070	310,246	310,246		471,130	455,010	435,590	387,807	387,807		616,110	592,410		569,620	449,857	449,857
The Crescent I & II	409,850	394,090	378,930	350,749	350,749		532,800	512,310	492,610	435,861	435,861		696,750	669,950		644,180	503,951	503,951
The Crescent III & IV	424,750	408,410	392,700	363,630	363,630		552,170	530,930	510,510	452,993	452,993		722,060	6,942,290		667,590	524,483	524,483
The Grove I	442,400	425,380	409,020	378,532	378,532		575,110	552,990	531,725	470,591	470,591		752,080	723,150		695,335	544,237	544,237
The Grove II	430,260	413,710	397,800	368,232	368,232		559,340	537,830	517,140	460,291	460,291		731,440	703,310		676,260	533,937	533,937
The Seneca I	446,800	429,620	431,100	382,679	382,679		580,850	558,510	537,030	475,773	475,773		759,570	730,360		702,270	550,250	550,250
The Seneca II	435,230	418,490	402,390	372,379	372,379		565,790	544,030	523,105	465,473	465,473		739,890	711,430		684,065	539,950	539,950
The Monocacy I & II	446,250	433,340	416,670	381,877	381,877		580,130	563,340	541,670	475,800	475,800		758,640	736,670		708,340	550,940	550,940
The Meadowside I	450,670	429,090	412,590	385,997	385,997		585,870	557,820	536,365	479,920	479,920		766,140	729,460		701,405	555,060	555,060
The Meadowside II & III	446,250	429,090	412,590	381,877	381,877		580,130	557,820	536,365	475,800	475,800		758,640	729,460		701,405	550,940	550,940
The Sandy Spring I & II	487,070	468,340	450,330	416,842	416,842		633,200	608,850	585,430	521,052	521,052		828,030	796,180		765,560	604,420	604,420
The Rock Hill I & II	496,450	477,360	459,000	424,992	424,992		645,390	620,570	596,700	529,708	529,708		843,970	811,510		780,300	613,473	613,473
The Waters I	549,410	528,280	507,960	470,175	470,175		714,230	686,760	660,350	585,144	585,144		933,990	898,070		863,530	677,120	677,120
The Waters II	562,650	541,010	520,200	481,813	481,813		731,440	703,310	676,260	600,722	600,722		956,500	919,710		884,340	695,848	695,848
The Henson I & II	586,370	563,820	542,130	501,864	501,864		762,280	732,960	704,770	623,468	623,468		996,790	958,490		921,620	720,752	720,752
The Henson III, IV & V	575,340	553,210	531,930	492,594	492,594		747,940	719,170	691,510	614,198	614,198		978,070	940,450		904,280	711,482	711,482
The Croydon	590,780	568,060	546,210	505,975	505,975		768,020	738,480	710,928	630,924	630,924		1,004,330	965,700		928,555	730,883	730,883
The Lewis I	612,290	588,740	566,100	524,084	524,084		795,980	765,370	735,930	652,529	652,529		1,040,900	1,000,870		962,370	755,286	755,286
The Lewis II	607,330	583,970	561,510	519,964	519,964		789,530	759,160	729,965	648,409	648,409		1,032,460	992,750		954,565	751,166	751,166
The Cabin John I & II	617,810	594,050	571,200	529,086	529,086		803,150	772,260	742,560	659,813	659,813		1,050,280	1,009,880		971,040	764,394	764,394
The Magnolia I	622,770	598,820	575,790	533,206	533,206		809,610	778,470	748,525	663,933	663,933		1,058,720	1,018,000		978,845	768,514	768,514
The Magnolia II	617,810	594,050	571,200	529,086	529,086		803,150	772,260	742,560	659,813	659,813		1,050,280	1,009,880		971,040	764,394	764,394
The Bennett I	628,850	604,660	581,400	538,182	538,182		817,490	786,050	755,820	670,153	670,153		1,069,040	1,027,920		988,380	775,729	775,729
The Bennett II	623,880	599,880	576,810	534,062	534,062		811,040	779,850	749,855	666,033	666,033		1,060,590	1,019,800		980,575	771,609	771,609
The Sugarloaf I	637,110	612,610	589,050	545,232	545,232		828,260	796,400	765,765	678,965	678,965		1,083,100	1,041,440		1,001,385	785,951	785,951
The Sugarloaf II	632,150	607,840	584,460	541,112	541,112		821,800	790,190	759,800	674,845	674,845		1,074,650	1,033,320		983,580	781,831	781,831
The Kingsbury	638,770	614,200	590,580	546,918	546,918		830,410	798,470	767,755	682,101	682,101		1,085,910	1,044,140		1,003,985	790,249	790,249
The Brookside I & II	653,660	628,520	604,350	559,358	559,358		849,760	817,080	785,655	697,652	697,652		111,230	1,068,490		1,027,395	808,287	808,287
The Brookside III & IV	653,660	628,520	604,350	559,358	559,358		849,760	817,080	785,655	697,652	697,652		111,230	1,068,490		1,027,395	808,287	808,287
The Quince Orchard	697,800	670,960	645,150	597,481	597,481		907,130	872,240	838,695	744,276	744,276		1,186,260	1,140,630		1,096,755	861,712	861,712
The Hikory I & II	743,030	714,450	686,970	636,072	636,072		965,930	928,780	893,060	793,546	793,546		1,263,140	1,214,560		1,167,850	919,524	919,524
The Hickory III & IV	743,030	714,450	686,970	636,072	636,072		965,930	928,780	893,060	793,546	793,546		1,236,140	1,214,560		1,167,850	919,524	919,524
The Takoma	770,610	740,970	712,470	659,709	659,709		1,001,790	963,260	926,210	823,092	823,092		1,310,040	1,259,650		1,211,200	953,798	953,798
The Vista	793,780	736,250	733,890	679,761	679,761		1,031,910	992,220	954,055	845,838	845,838		1,349,420	1,297,520		1,247,615	978,701	978,701
The Cedar	786,050	755,820	726,750	672,712	672,712		1,021,870	982,570	944,775	839,345	839,345		1,336,290	1,284,890		1,235,475	972,651	972,651
The Twinbrook I & II	785,500	755,290	726,240	672,564	672,564		1,021,140	981,870	944,110	839,160	839,160		1,335,350	1,283,990		1,234,610	972,436	972,436
The Lakeview	858,860	825,830	794,070	735,327	735,327		1,116,520	1,073,580	1,032,290	915,296	915,296		1,460,080	1,403,920		1,349,920	1,059,272	1,059,272
The Overlook	883,140	849,170	816,510	756,061	756,061		1,148,080	1,103,920	1,061,465	941,214	941,214		1,501,330	1,443,590		1,388,065	1,089,336	1,089,336

INDEPENDENT LIVING MONTHLY SERVICE FEES:

Monthly service fees represent the IL unit's pro rata share of the overall cost of certain services, as described in the Basic Services section of this document.

The monthly service fees, effective January 1, 2026, subject to adjustment, for new residents moving into apartments or cottages are presented on the rate schedules above and include a dining plan. Effective July 1, 2023, the gas/electric utilities for all TVAR residents was rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer pay this out-of-pocket expense. Residents that moved into cottages prior to January 1, 2018, are subject to different rate and amenities structures.

Monthly service fees are subject to adjustment with advance notice provided to residents. Effective July 1, 2023, the gas/electric utilities for all TVAR residents was rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer pay this out-of-pocket expense.

Monthly service fees for residents that moved into cottages 1/1/2018 or later, for cottages, and include a dining plan, for the prior five years are as follows:

Monthly service fees for residents that moved into cottages between January 1, 2012, and December 31, 2017, for the prior five years are as follows, and do not include a dining plan. Effective July 1, 2023, the gas/electric utilities for all TVAR residents was rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer pay this out-of-pocket expense.

	Move-in 1/1/2012-12/31/2017 - Cottages						
			Glen Oak				
			Mulberry				Second
			Sycamore				Occupant
	Year	Cedarcrest	Willow	Aspen	Rockport	Stone Haven	Sunnydale	Fee
	2021	$ 971	$ 980	$ 987	$ 1,112	$ 1,175	$ 1,222	$ 400
	2022	$ 1,010	$ 1,019	$ 1,026	$ 1,156	$ 1,222	$ 1,271	$ 416
	2023	$ 1,076	$ 1,086	$ 1,093	$ 1,233	$ 1,301	$ 1,358	$ 449
	2024	$ 1,562	$ 1,572	$ 1,579	$ 1,726	N/A	$ 1,867	$ 620
	2025	$ 1,903	$ 1,914	$ 1,921	$ 2,077	N/A	$ 2,216	$ 656
	2026	$ 2,265	$ 2,285	$ 2,290	$ 2,455	N/A	$ 2,600	$ 677

Monthly service fees for residents that moved into cottages prior to January 1, 2012, for the prior five years are as follows, and do not include a dining plan. Effective July 1, 2023, the gas/electric utilities for all TVAR residents was rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer pay this out-of-pocket expense.

	Move-in prior to 1/1/2012 - Cottages						
				Glen Oak			
				Mulberry			
				Sycamore			
	Year	Cedarcrest	Willow	Aspen	Rockport	Stone Haven	Sunnydale
	2022	$ 880	$ 888	$ 895	$ 1,026	$ 1,067	$ 1,108
	2023	$ 935	$ 944	$ 952	$ 1,093	$ 1,137	$ 1,182
	2024	$ 1,414	$ 1,423	$ 1,432	$ 1,579	$ 1,626	$ 1,673
	2025	$ 1,747	$ 1,756	$ 1,766	$ 1,921	$ 1,971	$ 2,021
	2026	$ 2,110	$ 2,120	$ 2,130	$ 2,290	$ 2,345	$ 2,395

At times, a rental option may be available for certain units. Rental rates do not include a meal plan. The rental rates for the prior three years are as follows:

Rentals - Cottages					
	Year	Cedarcrest	Willow	Glen Oak	
	2022	$ 3,069	$ 3,134	$ 3,224	
	2023	$ 3,875	$ 3,950	$ 4,045	
	2024	$ 4,059	$ 4,138	$ 4,237	
	2025	$ 4,296	$ 4,380	$ 4,485	
	2026	**$ 4,510**	**$ 4,600**	**$ 4,710**	

Effective July 1, 2023, the gas/electric utilities for all TVAR residents were rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer pay this out-of-pocket expense.

Effective January 1, 2026, monthly service fees for apartments, subject to adjustment, and include a dining plan, are as follows:

Apartment Types	2026	2025	2024	2023	2022
The White Oak	2,358	2,246	2,121	2,025	1,875
The Carderock	2,393	2,277	2,151	2,054	1,902
The Crescent I & II	2,623	2,500	2,361	2,254	2,087
The Crescent III & IV	2,758	2,625	2,479	2,367	2,192
The Grove I	2,838	2,703	2,553	2,438	2,258
The Grove II	2,838	2,703	2,553	2,438	2,258
The Seneca I	2,873	2,735	2,583	2,466	2,284
The Seneca II	2,873	2,735	2,583	2,466	2,284
The Monocacy I & II	2,898	2,760	2,607	2,489	2,305
The Meadowside I	2,898	2,760	2,607	2,489	2,305
The Meadowside II & III	2,898	2,760	2,607	2,489	2,305
The Sandy Spring I & II	3,213	2,760	2,607	2,489	2,305
The Rock Hill I & II	3,228	3,061	2,891	2,760	2,556
The Waters I	3,543	3,075	2,905	2,774	2,569
The Waters II	3,668	3,376	3,189	3,045	2,820
The Henson I & II	3,753	3,573	3,375	3,222	2,984
The Henson III, IV & V	3,753	3,573	3,375	3,222	2,984
The Croydon	3,853	3,670	3,375	3,222	2,984
The Lewis I	3,963	3,773	3,467	3,310	3,065
The Lewis II	3,963	3,773	3,564	3,403	3,151
The Cabin John I & II	4,033	3,840	3,564	3,403	3,151
The Magnolia I	4,033	3,840	3,627	3,463	3,207
The Magnolia II	4,033	3,840	3,627	3,463	3,207
The Bennett I	4,073	3,878	3,663	3,497	3,238
The Bennett II	4,073	3,878	3,663	3,497	3,238
The Sugarloaf I	4,128	3,929	3,711	3,543	3,281
The Sugarloaf II	4,128	3,929	3,711	3,543	3,281
The Kingsbury	4,713	3,972	3,711	3,543	3,281
The Brookside I & II	4,263	4,062	3,837	3,663	3,392
The Brookside III & IV	4,263	4,062	3,837	3,663	3,392
The Quince Orchard	4,258	4,313	3,837	3,663	3,392
The Hickory I & II	4,858	4,627	4,371	4,173	3,864
The Hickory III & IV	4,858	4,627	4,371	4,173	3,864
The Takoma	5,038	4,799	4,533	4,329	4,008
The Vista	5,123	4,880	4,610	4,401	4,075
The Cedar	5,138	4,894	4,623	4,414	4,087
The Twinbrook I & II	5,138	4,894	4,623	4,414	4,087
The Lakeview	**5,553**	5,288	4,995	4,769	4,416
The Overlook	5,713	5,440	5,139	4,906	4,543
Second Occupant Rate	1,200	1,154	1,090	1,041	964
Meal Plan Included	N/A	N/A	449	449	416

IL monthly fees for The Villas are as follows. Effective July 1, 2023, the gas/electric utilities for all TVAR residents were rolled into the monthly service fee. IL residents who have historically paid Pepco and Washington Gas directly no longer have to pay this out-of-pocket expense.

Year	**Lakewood**	**Woodmont**	**Avenel**	**Congressional**	**Second Occupant Fee**
2023	3,500	3,300			1,041
2024	3,710	3,498			1,090
2025	3,928	3,703			1,154
2026	4,123	3,888	4,655	4,668	1,200

ASSISTED LIVING (AL)

ASSISTED LIVING ENTRANCE FEES:

Assisted living residents are private pay. There is a $300.00 non-refundable application fee for each apartment suite and is due upon application submission. The application fee will be applied to the community fee. Every resident that has not paid an entrance fee in IL pays a $2,500 non-refundable community fee upon admission. Personal care items are made available to AL residents at additional cost.

ASSISTED LIVING MONTHLY FEES:

The assisted living monthly fees are determined by the unit type and level of care. A resident's level of care is determined by the Resident Assessment Tool, which assesses a resident's physical, functional and psychological strengths, and deficits. Within the approved regulated three levels of care, TVAR offers a fee structure as listed below. The assisted living monthly fees for the prior five years are as follows:

Level 1	**Studio**	**Studio Deluxe**	**One Bedroom**	
2021	7,064	7,364	8,364	
2022	7,361	7,673	8,713	
2023	7,950	8,287	9,410	
2024	8,507	8,867	10,069	
2025	9,017	9,399	10,673	
	3,412	3,412	3,412	Second Occupant
2026	9,560	9,965	11,315	
	3,615	3,615	3,615	Second Occupant

Level 2	**Studio**	**Studio Deluxe**	**One Bedroom**	
2021	7,386	7,686	8,686	
2022	7,699	8,011	9,051	
2023	8,315	8,652	9,775	
2024	8,897	9,258	10,069	
2025	9,431	9,813	11,087	
	3,826	3,826	3,826	Second Occupant
2026	9,995	10,400	11,750	
	4,055	4,055	4,055	Second Occupant

Level 3	**Studio**	**Studio Deluxe**	**One Bedroom**	
2021	7,779	8,079	9,079	
2022	8,112	8,424	9,464	
2023	8,761	9,098	10,221	
2024	9,374	9,735	10,936	
2025	9,936	10,319	11,592	
	4,331	4,331	4,331	Second Occupant
2026	10,530	10,940	12,290	
	4,590	4,590	4,590	Second Occupant

Level 4	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	8,285	8,558	9,558
2022	8,615	8,927	9,967
2023	9,304	9,641	10,764

2024	9,955	10,316	11,517	
2025	10,552	10,935	12,208	
	4,947	4,947	4,947	Second Occupant
2026	11,185	11,590	12,940	
	5,245	5.245	5,245	Second Occupant

Level 5	**Studio**	**Studio Deluxe**	**One Bedroom**	
2021	8,843	9,143	10,143	
2022	9,229	9,541	10,581	
2023	9,967	10,304	11,427	
2024	10,665	11,025	12,227	
2025	11,305	11,687	12,961	
	5,700	5,700	5,700	Second Occupant
2026	11,985	12,390	13,740	
	6,040	6,040	6,040	Second Occupant

Level 6	**Studio**	**Studio Deluxe**	**One Bedroom**	
2021	9,557	9,857	10,857	
2022	9,979	10,291	11,331	
2023	10,777	11,114	12,237	
2024	11,531	11,892	13,094	
2025	12,223	12,606	13,880	
	6,618	6,618	6,618	Second Occupant
2026	12,955	13,260	14,690	
	7,015	7,015	7,015	Second Occupant

ASSISTED LIVING MEMORY SUPPORT MONTHLY FEES:

The AL Memory Support monthly fees are dependent on unit type and level of care. A resident’s level of care is determined by the Resident Assessment Tool, which assesses a resident’s physical, functional and psychological strengths, and deficits. Within the approved regulated three levels of care, TVAR offers a fee structure as listed below. Every resident also pays a $2,500 non-refundable community fee upon admission. The assisted living memory care monthly fees for the prior five years are as follows:

Level 1	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	7,447	7,747	8,747
2022	7,761	8,073	9,113
2023	8,382	8,719	9,842
2024	8,969	9,329	10,531
2025	9,507	9,899	11,163
2026	10,075	10,480	11,835

Level 2	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	7,809	8,109	9,109
2022	8,142	8,454	9,464
2023	8,793	9,130	10,254
2024	9,409	9,769	10,972
2025	9,974	10,355	11,630
2026	10,570	10,975	12,330

Level 3	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	8,251	8,551	9,551

2022	8,606	8,918	9,958
2023	9,294	9,631	10,755
2024	9,945	10,305	11,508
2025	10,542	10,923	12,198
2026	11,175	11,580	12,930

Level 4	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	8,791	9,091	10,091
2022	9,172	9,484	10,524
2023	9,906	10,243	11,366
2024	10,599	10,960	12,162
2025	11,235	11,618	12,892
2026	11,910	12,315	13,665

Level 5	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	9,449	9,749	10,749
2022	9,863	10,175	11,215
2023	10,652	10,989	12,112
2024	11,398	11,758	12,960
2025	12,082	12,463	13,738
2026	12,805	13,210	14,560

Level 6	**Studio**	**Studio Deluxe**	**One Bedroom**
2021	10,251	10,551	11,551
2022	10,706	11,018	12,058
2023	11,562	11,899	13,023
2024	12,371	12,732	13,935
2025	13,113	13,496	14,771
2026	13,900	14,305	15,655

RESIDENT ASSOCIATION:

The Resident Association of IL works cooperatively with the Administration and the Board of Trustees as a vital part of TVAR. All TVAR residents are members of the Association. The Association encourages all IL residents to create a common bond of friendship as participants in the TVAR community; coordinates and plans community activities; provides a focal point for situations deemed pertinent to all members; provides information related to current public policies as they affect the role of the IL as an active continuing care retirement community; and cooperates with the Administration and the Board of Trustees in maintaining an enjoyable and purposeful life together.

INTERNAL GRIEVANCE PROCEDURE:

TVAR has established a grievance process, along with a Grievance Policy, to address resident grievances. The grievance procedure is as follows:

The Corporation encourages Residents to express their grievances and to suggest remedies or improvements in policies and services.

The Corporation has established an internal grievance procedure to address resident grievances. A resident or a group of residents collectively may submit a grievance in writing to the Corporation's Executive Director. The Executive Director will send a written acknowledgment to the resident or group of residents within five days after receipt of the written grievance. The Executive Director will assign personnel to investigate the grievance.

A resident or group of residents who file a written grievance is entitled to a meeting with management of the Corporation within 30 days after receipt of the written grievance, in order to present the grievance. The

Corporation will provide a response in writing within 45 days after receipt of the written grievance as to the investigation and resolution of the grievance.

Within 30 days after the conclusion of an internal grievance procedure established herein, a resident, group of residents or the Corporation may seek mediation through one of the community mediation centers in the State or another mediation provider. If a resident, group of residents or the Corporation seeks mediation under the preceding sentence, the mediation shall be nonbinding.

At the last meeting of the year with subscribers, the executive director will provide an aggregated, de-identified summary of the internal grievances submitted to the Maryland Department of Aging.

The formal policy and Grievance Form for SNF and AL can be found in Appendix A.

BOARD OF TRUSTEES:

Our Board of Trustees is comprised of the following individuals who volunteer their time to serve TVAR and have no financial interest in the community:

Chair	Mr. Roger Myers, Retired
Vice Chair	Ms. Heather Burton, SGAH Director of Surgical Services
Treasurer/Secretary	Dr. James Balow, Resident Board Member - Retired
President and CEO, NLCS	Ms. Cyndi A. Walters, NLCS
Trustee	Ms. Janet Meyer, Architect
Trustee/Resident Alternate	Ms. Nancy Meigs, Resident Board Member – Retired

At each annual meeting, the Board of Trustees elects new trustees to hold office until their respective terms expire and until their successor are elected and qualify. The Board of Trustees seek the most qualified candidate willing to serve as Trustees, provided that the Board of Trustees is encouraged, but not required, to elect Trustees who are members of the Lutheran congregations, and accordingly shall give preference to and endeavor to select, when available, qualified candidates who are also members of Lutheran congregations.

The Board of Trustees of National Lutheran, Inc. appoints the joint governance committee to identify and nominate Trustee candidates for approval by the full Board of Trustees. Annually, the joint governance committee nominates a slate of trustee candidates for The Village at Rockville's Board of Trustees approval and recommendation to the National Lutheran, Inc. Board of Trustees.

A subscriber of The Village at Rockville serves as a full voting member of The Village at Rockville Board of Trustees. In addition, a subscriber of The Village at Rockville serves as a non-voting member of The Village at Rockville Board of Trustees. The subscribers are selected and recommended by three individuals: the Executive Director, the outgoing subscriber Board of Trustees member, and the Residents' Association President who confers with the resident association membership for qualified candidates. Like the process for appointing non-subscriber members of the Board of Trustees, the candidates are presented to the board governance committee for approval before presenting to The Village at Rockville Board of Trustees for approval and recommendation to the National Lutheran, Inc. Board of Trustees as the subscriber members of The Village at Rockville Board of Trustees.

No Board of Trustees member receives monetary compensation for their tenure.

The TVAR Board of Trustees, in consultation with the President/Chief Executive Officer of National Lutheran Inc., shall appoint an Executive Director to manage TVAR. TVAR hosts quarterly meetings with subscribers in accordance with Section 10-426 of the Human Services Article of the Annotated Code of Maryland and COMAR 32.02.01.19. The provider is open to receive and answer questions raised by the subscribers at the meetings. The meetings shall be open to all subscribers. TVAR has two (2) subscribers as a member of the Board of Trustees (one of which is a non-voting member).

To our knowledge, no member of the Board of Trustees has been implicated in any of the following violations:

a. Been convicted of, or pleaded nolo contendere to, a felony charge involving fraud, embezzlement, fraudulent conversion, or misappropriation of property
b. Been held liable, or enjoined by a final judgment, in a civil action involving fraud, embezzlement, fraudulent conversion, or misappropriation as a fiduciary
c. Been subject to an effective injunctive or restrictive order of a court of record arising out of or relating to business activity or health care, including actions affecting a license to operate any facility or service for aging, impaired, or dependent persons
d. Had any state or federal license or permit suspended or revoked within the past 10 years, as a result of an action brought by a governmental agency arising out of or relating to business activity or health care, including actions affecting a license to operate any facility or service for aging, impaired, or dependent persons

INVESTMENT ACTIVITIES:

TVAR uses the services of an independent investment advisor(s) to manage, supervise, administer, and change investments per a written agreement. The investment policy is recommended by the Joint Finance Committee to the Board of Trustees and is reviewed at least annually.

OPERATING RESERVES:

TVAR is in compliance with the operating reserve requirements under Section 10-420(b) of the Human Services Article of the Annotated Code of Maryland as of December 31, 2022. The operating reserve fund investments are reviewed by the Finance Committee of the Board of Trustees annually and by independent auditors annually. As illustrated in the table below, TVAR is projected to meet or exceed the statutory operating reserve requirement annually, 2026 through 2028:

	Budget 2026	Projected 2027	Projected 2028
Total Operating Expenses for the Year Ended 12/31/20XX	48,213,272	49,755,566	51,689,756
Less: Depreciation and Amortization Expense	(7,032,500)	(7,282,500)	(7,732,500)
Less: Interest Expense	(2,750,940)	(2,747,340)	(2,747,340)
	38,429,831	39,725,726	41,209,915
% Reserve Requirement	25%	25%	25%
Calculated Reserve Requirement at 1/1/20XX	9,607,458	9,931,431	10,302,479
Assets Whose Use is Limited at 12/31/20XX	9,607,458	9,931,431	10,302,479
Beneficial Interest in Supporting Organization at 12/31/20XX	18,873,286	18,549,313	18,178,265
	28,480,744	28,480,744	28,480,744

Note: The Village at Rockville maintains a support agreement with National Lutheran Inc. and National Lutheran Home for the Aged, Inc. (NLHA). NLHA holds the investments that are providing the beneficial interest to The Village at Rockville.

Conclusion: Based on estimates and projections, TVAR is anticipated to have sufficient liquidity to meet the statutory operating reserve requirements. The Village at Rockville will continue to benefit from the Support

Agreement with National Lutheran Inc. (parent entity) which provides liquidity, if needed, to maintain debt compliance.

DESCRIPTION OF LONG-TERM FINANCING:

Please refer to Note #8, Long Term Debt, of the Financial Statements for a complete description of long-term debt.

Renewal and Replacement of Buildings and Facilities: TVAR typically provides approximately $1.5M - $2.5M in capital expenditures annually related to renewal, replacement, and improvement at the community. These funds are provided from operations and independent living unit entrance fees, as supplemented from time to time from funds advanced to TVAR by National Lutheran Inc. or proceeds from borrowings.-The capital replacement budget is reviewed and approved by both the TVAR and NLCS Board of Directors annually as part of the budget process. Longer term capital improvements (additions, renovations, and replacement of facilities) are typically financed on a project specific basis through the issuance of tax-exempt revenue bonds.

IL COMMUNITY BASIC SERVICES:

The following amenities and services are included in the Monthly Service Fee pursuant to the terms of our current Residence and Services Agreement:

- Parking at least one assigned parking space
- Right to use common areas
- Landscaped grounds
- Storage in residence
- A flexible spending dining program
- Housekeeping – light services every other week (includes vacuuming, dusting, cleaning, of bathroom(s) and kitchen, and trash removal in residence (on housekeeping day)
- Interior maintenance to include repair and/or replacement of all systems included in the residence, such as heating and air conditioning equipment, appliances, plumbing, and electrical systems, roof, etc.
- Exterior maintenance to include leaf removal, snow removal, (not to include personal vehicles), landscaping and mowing
- Utilities – standard municipal services (heating, air conditioning, electricity, natural gas, water, sewer, telephone jack installation upon request, local calls, and basic comcast television services). Replace with: The Corporation will furnish heating, air conditioning, electricity, natural gas, water, sewer, basic television services, telephone jack installation, local calls and standard municipal services. Resident is responsible for any charges related to long-distance telephone calls, internet, and premium cable services. If resident desires to install a satellite dish, such installation, and placement, must first be approved by the Corporation.
- Regularly scheduled local transportation for trips and shopping
- Use of the Engage Center including the Aquatics Center, Fitness Studio, Creative Arts Studio, classroom, woodworking shop and much more
- Social, recreational, educational, spiritual, and cultural events, including access to lifelong learning opportunities
- Situational awareness response assistant (SARA) wellness monitoring system
- Emergency call support
- Security
- Priority access to AL and SNF
- Smoke and carbon monoxide detectors
- No additional health care services are included in the IL entrance fee or IL monthly service fee

IL SERVICES WITH ADDITIONAL FEES:

- More frequent housekeeping services and other services such as windows, and steam cleaning carpets
- Utilities - wireless internet and premium cable services
- Personal transportation to private appointments, airport, etc.
- Onsite therapy services (may be billed to Medicare Part B or other participating insurance)
- Salon services
- In home personal services (cooking, medication reminders, companions, etc.)

HEALTH-RELATED BASIC SERVICES/SNF:

- Room and board
- Housekeeping services
- Medication administration
- Preventative skin care
- Assistance with bathing, toileting, feeding, dressing, and mobility
- Recreational and social programs
- Incontinence care, hand feeding, tube-feeding, special diet, catheter care, colostomy care, decubitus care, IV therapy, laundry, oxygen therapy, and suctioning

HEALTH-RELATED ADDITIONAL SERVICES WITH FEE/SNF:

- Private Duty Nursing/Geriatric Aides
- Beauty and barber
- Laboratory services
- Pharmacy
- Radiology
- Durable medical equipment (May be approved and/or provided under Medicare or insurance)
- Audiology services
- Dental services
- Occupational, physical, and speech therapy services (unless part of a specialized rehabilitative therapy service program meeting certain regulatory requirements

*Please note, any IL resident transitioning into the Health Center's SNF population will also pay the applicable fees for health-related services not included in the daily room and board rates in alignment with current SNF residents.

SKILLED NURSING FACILITY FEES:

If a resident is admitted to AL or SNF from IL for healthcare services, the IL resident pays TVAR's published rates, unless covered by Medicare, Medicaid, or other third-party insurance. All residents of SNF, whether originally from IL, AL, or directly from outside TVAR, pay this rate. Daily room and board rates for the last five years are as follows:

2020	$422 per day
2021	$436 per day
2022	$458 per day
2023	$495 per day

2024	$523 per day
2025	$562 per day
2026	$596 per day

Certain ancillary services and supplies are not included in the daily room & board rate.

Additional Financial Documents Included/Uploaded:

- **G.1: Certified Financial Statement**
- **G.3: Cash Flow Projection – Current and next Two Fiscal years.**

This Disclosure Statement shall be amended as necessary, if at any time, in the opinion of the provider or the Maryland Department of Aging, an amendment is necessary to prevent the disclosure statement from containing any material misstatement of fact required to be stated in the disclosure statement or omission of a material fact required to be stated in the disclosure statement.

Appendix A: Grievance Policy and Complaint Form

Appendix A for Skilled Nursing and Assisted Living Grievance Policy – Resident Rights Policy

Policy Statement

Our community shall support each resident's right to voice grievances, including those with respect to care and treatment which has been furnished or has not been furnished (e.g., those about treatment, care, management of funds, lost clothing, or violation of rights), without fear of or actual discrimination or reprisal. After receiving a grievance, the Community shall seek a prompt resolution, and notify the resident timely of the resolution and associated findings.

Our community shall assure that the resident is familiar with their grievance process and shall provide a copy of the Grievance Policy to the resident or resident representative upon request.

Every resident has the right to voice grievances to us or other agency or entity that hears grievances without discrimination or reprisal, and without fear of discrimination or reprisal, including those with respect to care and treatment which has been furnished or has not been furnished, the behavior of staff and other residents, and other concerns regarding their long-term care facility stay.

A grievance shall be defined as a written or verbal complaint (when the verbal complaint about resident care is not resolved at the time of the complaint by staff present) by a resident, or the resident's representative, regarding the care and services, abuse or neglect, issues related to the Community's compliance with the CMS Requirements of Participation, or a billing complaint. All written complaints, regardless of method of communication, shall be considered a grievance. Verbal complaints that are unresolved at the time of the complaint or require further action shall be considered a grievance.

Our community shall designate an individual as the Grievance Official, who shall have the responsibility for oversight of the grievance process, receiving and tracking grievances through to their conclusion, leading any necessary investigations by the facility, maintaining the confidentiality of all information associated with grievances, issuing written grievance decisions to the resident, and coordinating with state and federal agencies as necessary.

Our community or any staff members shall not prevent or discourage a resident from communicating with Federal, State, or local officials, including but not limited to Federal and State surveyors, other Federal or State health department employees, including representatives of the Office of the State Long-Term Care Ombudsman and of the protection and advocacy system.

Our community shall communicate to each resident the process for filing a complaint or grievance, orally or in writing, and anonymously through postings in a prominent location.

Our community shall make prompt efforts to ensure the resolution of all grievances. Our community shall respond to grievances from resident or family groups; however, our community (TVAR) is not obligated to implement or adopt requested recommendations.

The resident shall be informed of their right to receive a written response to their grievance, and the contact information of independent entities with whom grievances may be filed.

Policy Interpretation and Implementation

1. Our community has appointed the following individual as the Grievance Official:

Social Services Manager

socialservices@thevillageatrockville.org

301-354-8438

2. Grievances may be communicated to any staff member, verbally or in writing. Resident and/or resident representative may utilize the designated Grievance Form, however, use of the form is not required. Grievances may be communicated anonymously. Verbal concerns that are resolved at the time of the concern by a present staff member shall not be considered a grievance.

3. Grievances shall be communicated to the Grievance Official at time of the complaint or on the next business day.

4. Staff members shall immediately report allegations of neglect, abuse (including injuries of unknown source), and/or misappropriation of resident property, by anyone furnishing services on behalf of the facility, to the administrator of the facility and as required by state law, consistent with the Abuse Prevention and Investigation Policy.

5. Residents shall be protected from further violations of resident rights during an investigation.

6. Efforts to resolve a grievance, including initiation of investigative process, shall begin as soon as practical, but within 72 hours.

7. Unless otherwise communicated to the resident, the expected time frame for completion of a grievance review is five business day(s)

8. Written grievance decisions shall include: a date the written decision was issued, the date the grievance was received, a summary statement of the resident's grievance, the steps taken to investigate the grievance, a summary of the pertinent findings or conclusions regarding the resident's concerns, a statement as to whether the grievance was confirmed or not confirmed and any corrective action taken or to be taken by the facility as a result of the grievance

9. Upon conclusion of the investigation, the resident or resident representative shall be informed of the findings and notified of their right to obtain a copy of the written decision upon request.

10. Should the grievance investigation, or any outside entity having jurisdiction over the Community, confirm a violation of resident rights, appropriate corrective action, including any associated regulatory reporting, shall be taken.

11. The Community shall maintain evidence demonstrating the resolution of complaints and grievances for at least 3 years.

12. Information associated with the Grievance Policy and Grievance Official shall be posted publicly in a form and manner accessible and understandable to residents and resident representatives.

13. Residents have the right to file a grievance with any independent entity with whom grievances may be filed, to include, but not limited to:

a) QIO - Livanta LLC

BFCC-Quality Improvement Organization
10820 Guilford Road, Suite 202

Annapolis Junction, MD 20701-1105

(888) 396 - 4646
(888) 985 - 2660 - TTY

a) The Department of Aging (for persons 65 years old or older)

301 West Preston Street
Baltimore, MD 21201

Telephone: (410) 767-1100
(410) 767-1083 (for the hearing impaired)

b) For TVAR - Montgomery County Long Term Care Ombudsman - Department of Health and Human Services

3950 Ferrara Drive, 2nd floor
Silver Spring, MD 20906
Telephone: (240) 777-3369
(240) 777-1495 (fax)
E-MAIL: HHSLTCOmbudsman@montgomerycountymd.gov

c) State Survey Agency: The Office of Health Care Quality, regardless of your age Spring Grove Center, Bland Bryant Building

7120 Samuel Morse Dr, Second Floor
Columbia, MD 21046
Telephone: (410) 402-8110 or (1-877) 402-8219
(410) 735-2258 (for the hearing impaired)
(410) 402-8234
(fax) www.dhmh.maryland.gov/ohcq

d) Montgomery County: Licensure and Regulatory Services Department of Health and Human Services

255 Rockville Pike, 2nd Floor
Rockville, MD 20850
Telephone: (240) 777-3986

(240) 777-3088

e) Montgomery County Adult Protective Services Department of Social Services

401 Hungerford Drive, 5th Floor
Rockville, MD 20850
Telephone: (240) 777-4513
(800) 917-7383 (1-800-91 PREVENT)

14. If the concern remains unresolved, the resident should present it in writing to the Executive Director to be addressed at the next weekly meeting of Department Heads. If the resident has difficulty putting his/her concern in writing, a staff member will be designated to offer assistance.

The Village at Rockville Resident/Guest Concern/Complaint Form

Instructions: Residents, their representatives, family members, or advocates may file a grievance or complaint with the Administrator without fear of threat or reprisal of any form. Please complete, date, and sign this report and submit it to the Social Services Director, Administrator or his/her designee. You will be provided with a report of the facility's findings as outlined in our facility's policies and procedures. You may choose to remain anonymous. A condensed version of the grievance policy may be found on the back of this form.

Name of resident: ___________________________ Room #: ______ Today's Date: _____________

Name of person filing the grievance/complaint: ____

[ ] Representative [ ] Family [ ] Visitor [ ] Advocate [ ] Resident/Guest [ ] Anonymous

Date the incident occurred: ________________________ Time: _______________________

Describe the nature of the concern/complaint (be specific). Use additional paper as needed:

____

____

____

____

If other persons involved, please name them:

Name	Employee	Resident	Visitor
____	[ ]	[ ]	[ ]
____	[ ]	[ ]	[ ]

If there were witnesses, please name them:

Name	Employee	Resident	Visitor
____	[ ]	[ ]	[ ]
____	[ ]	[ ]	[ ]

What actions/recommendations do you feel need to be taken?

____

____

____

_________ ____

Date Signature of person filing concern – leave blank if anonymous

Financial Statements

All required financial statements uploaded into Dept. of Aging system as required.

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