



The Bridge

Connecting Our Community Through Giving

Issue 2 • Summer 2026

News from Waterman Communities Foundation



Welcome to the second issue of **The Bridge**, Waterman Communities Foundation's newsletter, created to keep you informed about the Foundation and its efforts to enhance the lives of our residents and employees and shape our community's future.

Topics of interest and inspiration in this issue include:

- Naming of the Endowment
- Campaign Ends, But Giving Continues
- New Committee Formed to Help Guide the Foundation's Future
- Using Your RMD for Your Donation
- Update on COP's Golf Carts

You'll also get an "inside look" at a few more of our donors and Board members and learn about recent uses of Foundation funds.

Endowment Named for Donald and Patricia McGee

By Arvon Byle

When the Foundation launched its fundraising campaign in 2025, we anticipated experiencing significant peaks and valleys knowing that volatility is part of the territory. Our goal was a permanent endowment to fund annual giving to our residents and employees. Donations were coming in slowly, but we needed a boost. Lakeside resident Dr. Donald McGee, checked out the Foundation and found us worthy. He stepped forward and agreed to be the "keystone donation" to get us rolling. This was our euphoric high! His six-figure contribution was a legacy donation to firmly establish our Foundation's endowment. And so, with great gratitude, the Foundation is proud to announce it has named the endowment in honor of Donald and Patricia McGee.

Naming our endowment in recognition of Dr. McGee and his late wife, Patricia, is a reflection of the Foundation's deep appreciation and admiration for him as a visionary and humanitarian. Dr. McGee has a long record of giving which reflects his deep understanding of the power of philanthropy to transform lives and strengthen communities. As this endowment grows over time, it will carry forward the McGee family's name and their commitment to meaningful change. We are deeply grateful for his partnership and proud to advance his legacy.



Dr. Donald McGee is a quiet, unassuming man. When you encounter him sitting in his Reading Room in the Grand or see him having dinner in the Sports Bar, please express your thanks for his generosity. His demonstrated, thoughtful leadership and concern for his fellow residents is exemplary. He greatly deserves our accolades. Thank you, Dr. McGee.

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Now the Fun Begins

By Arvon Byle

One year ago, the Foundation launched its **Community in Action** campaign to create a permanent endowment with the investment earnings supporting resident amenities and employee education.

Thanks to your generosity, we are managing contributions close to \$650,000, and donations are still coming in. Unless contributions are designated, nothing will be spent from the initial McGee endowment.

A Resident/Donor Focus Group has identified a future direction for the Foundation, and we're implementing their recommendations. A campus improvement project is being considered, and resident and employee grant applications are NOW available. For more information or to request a grant application, contact Michael McGuire, mcguire7829@gmail.com.

Please remember the Foundation in your annual giving and estate plans. Your support helps ensure the Foundation can continue enriching our community and fostering opportunities that benefit everyone.

While the initial campaign has been a success, our work continues. **Let's keep this momentum going and "continue the fun"** so together we can strengthen our community so it thrives for years to come.



New COPs Golf Carts Are Out on the Streets!

By Susan Kerr

The new golf carts – purchased by the Foundation for the campus COP (Citizens on Patrol) program – have arrived, and you may see them cruising the community! Leader Les Morgenstein says, "The Foundation really stepped up to help us with the new carts. Our resident volunteers and I are the happiest group of COPs now!"

Their old carts were in bad shape and undependable, raising concern about what could happen while on patrol. "Now we can concentrate on the safety of the community rather than fearing something will happen to the carts when we stop to assist a resident," Les added.

The new carts are equipped with lithium batteries which will hold a charge for days. First aid kits – complete with face masks – are "on board" along with a map of the Waterman Village community to help the COP volunteers plan their routes to easily respond to resident needs.

The COP program has a great connection to the Mount Dora Police Department. Through the Department's Group Education Sessions, Waterman Village COP volunteers, along with COP officers from other areas in Mount Dora, can participate in the classes to stay informed of what to look out for in our community.

Our current COP volunteers are Dick Branting, Pat Smith, George and Pat Rand, Skip and Deb Brown, Al Ragana, Bill Thiener, Tom Raybould, Richard Gailey, and Les and Jill Morgenstein. They look forward to helping residents in need and making our community a safer place to call home. The volunteers also extend a special "thank you" to Emma Stockman who provides the COPs with needed administrative services. They couldn't do what they do without her support.



Forging a Future

By Michael McGuire

Capitalizing on the momentum of a successful endowment fundraising campaign, the Waterman Communities Foundation launched its first Resident/Donor Focus Group to seek input on the Foundation's future direction. Group members met in February and March and included Don McGee, Bob White, Dee Hall, Jeanne Reed, Courtland Munroe, Steve Barnes and Wynne Guy, with Michael McGuire serving as facilitator.



In establishing the Focus Group, the Foundation Board was hoping the group would yield valuable input for the Board to use to plan a path forward. The group did not disappoint. They provided suggestions on the Foundation's strategy for the future, discussed the Foundation's role in the community and advised how to effectively communicate its programs. Highlighting the structure of the Board's committees, the group felt more resident involvement was important. The Focus Group strongly endorsed an active grants program emphasizing educational programs for residents and staff, which would benefit the community as a whole.

These and other recommendations from this hard-working group were shared with the Foundation Board and addressed during the Board's first workshop in April. The information gathered from the Focus Group will be instrumental in helping the Board prepare a strategic direction for the future of the Foundation.

Really Make a Difference With Your RMD

By Larry Senn

Many of us have made donations to our favorite charities. We've chosen to give outright gifts of money, stocks or bonds, testamentary contributions or perhaps monetary pledges over a period of years.

Donations to a qualified charity are deductible from your taxable income and thereby reduce your tax liability. However, they are only tax deductible IF you itemize your tax deductions. For many of us retirees, though, our allowable tax deductibles no longer exceed our personal exemption amounts, and so are no longer useful.

An often overlooked way to make a charitable contribution, and one that remains tax deductible, is to make a donation from your IRA or other retirement accounts. Most of us at Waterman Village must take a certain amount from our retirement accounts each year. This is called a Required Minimum Distribution or RMD, and it is taxable income in that year.

You can reduce that taxable income by making a charitable contribution from your RMD. This type of contribution is termed



a Qualified Charitable Distribution or QCD. It works to reduce your taxable income the same as a charitable contribution worked when you itemized your deductions.

To make a QCD, you must request the institution holding the IRA funds to prepare the check made out to Waterman Communities Foundation. A personal check will not qualify. There may be certain requirements and limitations, so seek professional advice if you have questions.

When you are considering the Waterman Communities Foundation for your charitable giving, think about using your RMD, an easy, tax-advantaged way to make your gift.

Appreciation Meal for Local Fire Departments

By Nancy Purnell

Thursday, February 12, was a “red letter day” for the Waterman Communities Foundation. Members from the Foundation Board, Culinary and Activities Departments delivered our Second Annual “Appreciation Meal” to our local EMT/Fire Departments. Enough meals were delivered to cover three shifts each for the two Mount Dora stations.

The recipients were so grateful for the meals. But, the residents of Waterman Village were really the most appreciative because of the wonderful services the EMTs and Fire Department personnel provide us throughout the year. Many of our residents signed and wrote personal messages on giant Thank You cards presented to each station along with the meals. The touching sentiments impressed and meant a great deal to the EMTs and Fire Department personnel.

Lakeside resident Sondra Luebke was the original inspiration for this meal event. She approached the Foundation Board last year with the “meal idea” for acknowledging the many efforts of the EMTs and local Fire Departments who provide needed assistance to our residents and keep our community safe. When Sondra was unable to spearhead this year’s event, resident Carol Holec stepped up to plan and coordinate all the arrangements.

No matter how well organized and orchestrated the event was, a few little glitches came up along the way. But, Felix, Waterman’s bus driver, pitched right in and handily solved every minor snag to ensure the event ran smoothly.

This Second Annual Meal Appreciation event was made possible through a generous donation to the Waterman Communities Foundation from Hillcrest Insurance. The Foundation is looking forward to next year’s Meal Appreciation Event!



Welcome Home! PARTY

By Nancy Purnell

The Lakeside Sports Bar was the place to be on May 21 as residents gathered to celebrate their returning home after last year’s significant water intrusion. Initiated by Nancy Purnell and Bob Kime, the party came to life through the organizational efforts of Betty Ann Huntsman and Joan Bortz, with support from the Culinary, Activities and Resident Relations teams. The event was sponsored by the Waterman Communities Foundation.

“When we had to leave our homes and stay in nearby hotels, we bonded through a difficult situation,” said Betty Ann. “This was a chance to come back together under better circumstances, relax and have some fun. We also appreciated the Foundation’s support.”

Special thanks also go to Waterman Village Management for going above and beyond to ensure residents’ safety and comfort by arranging accommodations, meals and transportation during the relocation process. After months of cleanup, renovations and refurbishing, it’s wonderful to have everyone back home safe and sound — and the Pods are finally gone! Plus, the party was such a success that the group wanted to gather again ... perhaps next time for dinner.

NAME THAT SPACE!

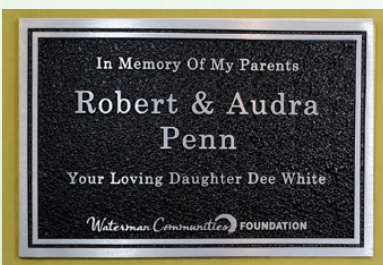
The Waterman Communities Foundation is deeply grateful for every gift in any size. Many residents have chosen to contribute by taking advantage of the wide range of naming opportunities available throughout our campus. The Foundation offers residents the opportunity to name or rename campus buildings, interior spaces, or outdoor common areas in honor of a special person, couple or even a beloved pet, in recognition of a gift to the Foundation. Let's take a closer look at six spaces that were recently named by residents.



Andrew Dujon, Robert White and Arv Byle



▲ *Lakehouse East
Apartment Building*



▼ *The Lodge at the Oaks*



Generous Donations Honor Parents' Memory

Lakeside residents Robert and Dee White have a long history of philanthropy stemming from their faith. Bob said, "Dee and I are motivated by the maxim that 'to whom much is given, much is expected.'" Their generosity has benefited churches, educational programs and charities, both locally and further afield.

Guided by their dedication to helping others, the Whites were drawn to the Foundation's fundraising effort because of its intent to build an endowment. Being among the first major donors to the endowment drive, Bob and Dee felt this was a way to establish something enduring. They believed, too, in the Foundation's emphasis on educational support for employees and residents.

Bob and Dee chose to support the Foundation by naming two buildings that have special meaning for them – the Lodge and Lakehouse East. Bob noted, "We enjoyed dining at the Lodge before it closed for renovation and can't wait to dine there again." Their plaque for the Lodge is in memory of Dee's parents. And, because Lakehouse East is their home, they named the building in memory of Bob's parents. Bob added, "We hope our gifts will encourage others to contribute."

They built professional careers within the telecommunications and pharmaceutical sectors. Before retiring, Bob worked in upper management for Warner-Lambert, Inc. in New Jersey. Now living at Lakeside just under a year, Bob and Dee will celebrate 50 years of marriage this year.

Name That Space continues on the following pages →



For the Love of Games

Carl and Bonnie Kusky believe in being positively engaged in their community. Their dedication to service has revolved around their families, churches, schools and careers. Activities like raising funds for an area food pantry and soup kitchen and, after the 2005 tornadoes, organizing teams to help in cleanup recovery efforts are two examples of their service while living in The Villages. With their devotion to helping their community, it was natural for Carl and Bonnie to jump right into activities at Waterman Village when they moved to Lakeside in December, 2021. Bonnie served on the Resident Council. Carl was a member of the Dining Services Committee and served for three years on the Foundation's Board of Directors. As a 22-year US Marine Corps veteran, Carl joined and helped revive the Waterman Village Veterans Group that now organizes the annual Military Ball.

When Bonnie and Carl aren't busy with community obligations, you'll find them playing their favorite games of bridge and poker. "Given our love of games," Carl said, "Bonnie and I wanted to name the Card Room at Lakeside." The inscription on the plaque reads: Oliver-Kusky Game Room aka the "O.K. Corral." (Oliver was Bonnie's name before she married Carl). The inscription is a playful nod to the famous 1881 Tombstone event. Carl and Bonnie wanted to recognize the Game Room as the welcoming spot for residents to enjoy cards, board games and more. Carl added, "Supporting the Foundation in this way is simply a continuation of our service to the community in which we live."

Area Businessman Honored in Naming Sports Bar

The Foundation's Naming Opportunities Program is gaining popularity. The plaques mounted around our campus recently caught the eye of Lakeside resident Renee Belair. "I liked the idea of naming a space that would have special meaning for me," Renee said, "and seeing the plaques inspired me to have a plaque of my own. I wanted to name the Sports Bar in Lakeside Grand in honor and memory of my son, Aaron Belair." Aaron was a highly respected and well-loved entrepreneur in Eustis, Florida. He was the owner of El Marie Pizzeria & Sub Shoppe and part-owner of the popular and unique Eustis sports bar called That Place. Aaron was a smart businessman and strong community supporter, and it just seemed appropriate for Renee to name the Lakeside Sports Bar in tribute to him. "I'm glad I had this opportunity to support the Foundation in this distinctive way," Renee added.

Aaron was responsible for bringing Renee to Mount Dora. She had lived in Miami for 35 years, and he wanted her closer to him. Aaron thought the charming community of Mount Dora would be perfect for his mother. He found Waterman Village and just knew Renee would love living here. So, she moved north and has made Lakeside her home for the past four years.





“Bridging” Our Community Through Giving

Giving back to their community has always been important to Jan and Allen Williams. And, they believe Foundations can be very beneficial to communities they serve. They lived in a community in Cedarville, Michigan, where they were very active with that community’s Foundation, creating their own charitable fund under that Foundation’s umbrella. Because of this experience, Jan and Allen are very interested to see the Waterman Communities Foundation succeed as well. “We wanted to support the Foundation and participate in the Naming Opportunities Program” said Allen “and thought naming the Bridge spanning Donnelly Street would be a great way to bring our community together.” Their plaques, at each end of the Bridge, read “Keeping our Community Connected,” with their names beneath.



Jan and Allen lived in Tucson, Arizona, where they were members of a hot air balloon team, before moving to Florida and eventually to their Lakehouse West home in the fall of 2022. They are

“snow birds,” maintaining an island home in northern Michigan where they enjoy spending their summers and boating on the Great Lakes. At Waterman Village, Allen stays active in the gym and dabbles in the Wood and Hobby Shop. Jan enjoys the exercise classes and the activities on campus. They both love music, and when she’s feeling up to it, Jan is “quite the dancer”!

A Place to be Creative

Jim Krull has always liked using his hands to fix things and make something new. This stemmed from his work as a tool maker for the Buick Division of General Motors in Michigan. When Jim and his wife, Barb, left Michigan in 2023 to move to Waterman Village, Jim switched from working with metal to wood. He was drawn to the Oaks Wood and Hobby Shop where he could refurbish wood cabinets and other wood items.

Jim said, “I envision the Wood and Hobby Shop becoming a place for both men and women to not only fix something but also create new things.” Through the sale of old equipment, Jim was able to modernize the woodworking section. The hobby section needs upgrades, too. So, Jim and Barb made a designated donation to the Foundation for improvements for the hobby area. Their plaque reads: Wood & Hobby Shop “A Place to be Creative,” with their names beneath. “I appreciate the Foundation making this opportunity available,” he added.

Both sections of the shop are handicapped accessible, with safety a primary consideration. The spaces are airy, and with more updates they will continue to be an inviting, more user-friendly working environment. Jim said, “I believe that in retirement one needs to keep the mind active. Working in wood and creating new things is the answer for me.” He encourages everyone to come to the Wood and Hobby Shop to try a new activity and create things for themselves or others.



Meet Your Foundation Board

The Foundation Board is currently comprised of nine members. Pastor Fred Boone is the Waterman Village liaison to the Board and serves in an advisory, non-voting capacity. Following are highlights about two current Board members.

Ellen Hart joined the Foundation Board in June 2023 serving as the Board Secretary. She is responsible for taking our meeting minutes, issuing “Thank You” letters to donors, handling other Foundation correspondence and maintaining the Board’s Membership Roster. Ellen received a Ph.D. in Special Education/Learning Disabilities from the University of Maryland and spent her professional career as educator from elementary school through college teaching, advising and advocating for students with disabilities. Ellen and her husband Jack moved from Maryland to Leesburg in 1999 before moving to Waterman Village in 2020. In addition to her work with the Foundation, Ellen is actively involved in the Wellness Committee and serves as Secretary for the Library Committee. Ellen can be reached at (352) 552-5094 or ejhart07@gmail.com.



Laurence (Larry) Senn has been an active member of the Foundation Board, leading the creation of the Employee English Language Classes, chairing the corporate giving solicitation effort for the “Community in Action” campaign, and working with the Citizens on Patrol (COP) program on the purchase of new golf carts. Larry and his wife of 60 years, Katharine, have been Lakehouse East residents since September 2023. Larry has a B.A. and J.D. degrees from the University of North Carolina. He joined the King & Spalding law firm in New York City in 1995 and served as the head of their Litigation Practice through 2000, retiring as a partner in 2004 following 35 years of practice in commercial litigation. Larry is an avid golfer, and when not on the course, he can be reached at (917) 721-9820 or lvsenn@gmail.com.



Stay tuned for highlights on our other Board members in future newsletters.



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Waterman Communities Foundation is a qualified 501(c)(3) tax-exempt organization.

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Looking for a meaningful way to contribute to our community? The Foundation is looking to fill vacancies on our Board and welcomes residents who would like to be actively involved in helping guide efforts to shape our community’s future. If interested, please contact Arv Byle at (813) 767-4821 or arvsalbyle@gmail.com.

Please share your thoughts and ideas with us so we can plan a path forward for enhancing your lives and those of our employees.