

Waterman Village Mount Dora, Florida

RESIDENT MEETING

Andrew Dujon, President and CEO, opened the resident meeting with the Pledge of Allegiance on Wednesday, August 27, 2025, at 3:00 pm.

Announcement

- Before we move into the heart of our meeting, we would like to take a moment to recognize some very special individuals. As you can see, several of them are here with us today. Our **Citizens on Patrol** has continued to grow and thrive, thanks to the dedication of our residents. Under the leadership of **Les Morgenstein** and with the support of many others, the program has gained strong participation and become an essential part of our community's safety efforts.

Today, we are pleased to recognize several volunteers for their service and dedication:

- **Deb and Skip Brown** – for their outstanding contributions to the program. We truly appreciate the work you have done and the commitment you have shown. Please come forward to accept your certificates of appreciation.

We also have some well-deserved promotions to announce:

- **Bill Thiener** and **Rich Gailey** – promoted to *Sergeant*.
- **George Rand** – promoted to *Captain*.

Let us give them all a round of applause for their dedication and service! On behalf of the community, I would like to extend a heartfelt thank you to all our COPS volunteers. Your efforts provide the necessary extra support to our security team. I often see you in action—jumping into the carts, making your rounds, and doing your part to keep our campus a safer place. Your volunteerism is deeply appreciated, and it makes a real difference for all of us.

AMY EUBANKS- BRIDGEWATER & SPRINGWATER DIRECTOR OF NURSING

Census Update:

- **Bridgewater Assisted Living** – 75 out of 77 rooms are currently occupied, with a couple of new move-ins scheduled.
- **Springwater Memory Care** – 23 out of 24 rooms are occupied, with another resident pending from Independent Living.

If you are considering respite care or planning for the future, please stop by. We would love to give you a tour, invite you to join us for lunch, or spend some time with us.

Bridgewater residents recently enjoyed a boat tour on Lake Griffin followed by lunch. We're hosting college football tailgates with games on the big screen, which always proves to be a big hit!

Each month, we take our residents on a cultural "Tour around the World." This month: *Belgium* at Bridgewater and *Hawaii* at Springwater. Residents enjoy themed food, décor, keepsakes, and even "passports." Assisted Living Week (September 8–12): A whole week of fun, including our most anticipated event—Mega Bingo with real prizes and gift cards!

The dining room at Bridgewater has been fully remodeled with new chairs and a private dining space—perfect for family meals. We have also added new patio furniture in our garden and front entrance, making it a lovely spot to enjoy the cooler weather. For tours, events, or questions, please reach out to Amanda Meurer, our Movement Coordinator (extension 264). Of course, I am always available. I am available in both buildings and happy to come to you. Please let someone know if you would like to speak with me. We hope you will visit us, share a meal, and see all the wonderful things happening at Bridgewater and Springwater.

DAVID LARSON- VICE-PRESIDENT/CHIEF FINANCIAL OFFICER

First, as you may have seen, we sent out the rate increase letter regarding next year's budget. If you have not received it, please let us know, and we will ensure you receive another copy. Independent Living will increase by 6%. However, those enrolled in the electronic payment program receive a 1% discount, resulting in a net increase of 5%. Assisted Living will increase by 5%, with a net 4% increase for those in the electronic program. We are continuing to work toward a break-even budget. Out of a \$55 million budget, the projected bottom line is only \$58,000, so it is a very slim margin. One significant change this year is that we are increasing our capital expenditures budget from \$3 million to \$4.8 million. This will enable us to acquire a new bus and potentially another car, as well as undertake several other projects that will have a direct impact on residents.

The second thing I want to address is our Benevolence Program. Many of you may not realize that we have one, and I want to emphasize its value. In my 30+ years working with continuing care retirement communities across the country, nearly all of them have a similar program. It is designed for residents who, through no fault of their own, may run out of money. This program is completely confidential—only one or two staff members know who participates. I may not always know the specific names myself. It allows you to remain in Independent Living, Assisted Living, and eventually Skilled Nursing, where Medicaid can help cover costs. What baffles me is that many residents, when they begin to worry about finances, decide to move out. Often, that is the worst decision you can make. If you have already invested five, six, or seven years here, moving forfeits the benefits you've built up. This program is exactly what your investment has helped create. If you have any concerns—whether you think it may be an issue in a few years or you are feeling pressure now—please talk to me directly. We can review your situation, estimate timelines, and plan accordingly to ensure a seamless transition into the program. No one else will know, and there is no stigma associated with it. It is truly a phenomenal benefit.

ALVIN SMITH- DIRECTOR OF FACILITY SERVICES

We are currently exploring the purchase of a new bus, possibly in 2026. In the meantime, our existing bus will be undergoing maintenance in September. The goal is to keep it running a bit longer while we continue researching the best replacement option. David and I have been in contact with several companies to ensure that when the time comes, we select the right vehicle for the community.

- **Concrete & Pathway Project:** The contractor currently working on the walls at Waterford will also begin creating a walking path that connects to the Outpatient and Home Health areas. The new ramp and path will cut through the trees near the current bus parking area, allowing residents to avoid traffic exits and improving overall safety.
- **Parking Lot Expansion:** We are moving forward with plans to expand the parking lot next to the lawn bowling courts. We have received one bid already and are waiting on two more to ensure we get the best price and quality. At the same time, the lawn bowling courts themselves will be redone to improve their appearance and function.

- **Courtyard Enhancements:** Over the next few days, you will notice upgrades in the courtyard, including more comfortable seating, updated landscaping, and a refreshed layout. These improvements are designed to make the space more inviting and enjoyable.
- **Manors Gate Update:** Unfortunately, the gate was struck by lightning again and is currently out of service. A replacement part has been ordered and is expected to arrive soon. On Monday, lightning also affected the Bridgewater area, which caused a brief outage. That issue was resolved within a few hours, thanks to Duke Energy.
- **Landscaping Plans:** We continue to work closely with our landscape architect and several residents to develop and implement a community-wide plan. Some updates will begin rolling out soon as we enhance the overall look and feel of the grounds. That is the current update—several important projects are underway, each designed to improve safety, accessibility, and the overall beauty of our community.

PASTOR FRED BOONE- DIRECTOR OF SPIRITUAL WELLNESS

One of the things I want to share with you today is how much we care about your overall well-being—not only your physical health, but also your spiritual wellness. Several of us on staff work together with that in mind, and we want to be sure you are cared for and supported.

Hospital Notifications

- When you leave campus by ambulance, we are automatically informed. However, there are times when a family member, spouse, or friend may take you to a hospital or clinic, and you are admitted without our knowledge. In such cases, we often do not discover the issue until much later—sometimes when a resident is already in a critical condition. Please help us by making sure that either you or a direct family member notifies us if you are admitted to the hospital. We do not want to rely on third-hand reports. We ask this because we genuinely care about you, and knowing your situation allows us to support you in meaningful ways.

Community Value

- This is a wonderful place to live, and we work hard to be sensitive to your needs and provide amenities that make life here special. Occasionally, residents consider leaving to save money, but this often ends up costing more—and without the same level of support and services. As David mentioned earlier, this is a truly great community, and we encourage you to take full advantage of what is offered here.

Weekly Worship Services

- Non-denominational service: Every Sunday at 10:30 am. Televised on Oaks side Channel 998 and Lakeside Channel 4.
- Catholic Mass: First Wednesday of each month at 11:00 am.
- Episcopal Service: Third Wednesday of each month at 11:00 am. We invite you to participate in these opportunities for worship and fellowship.

Special Program – History of Christianity

- Beginning Saturday, September 6, we will host a five-week series on the History of Christianity and Its Influence on the U.S. Sessions will run on Saturday mornings from 10:30 to 11:30 am. You will not miss any football games—and I think you will find it both enjoyable and informative. Do not worry—there is no charge for this program. If you do not enjoy it, see me afterward and I will give you your money back—oh, wait, there is not any!

JENNI GIBSON-HOME HEALTH ADMINISTRATOR

As always, I would like to remind you that our office is located outside the front gates, next door to Outpatient Therapy and Marketing. If you ever have questions about physical therapy, nursing home care, private duty services, or any related needs, please don't hesitate to stop by—we are always happy to help.

New Medicare Pathways Guide Program

We are excited to share that we recently became contracted with a new Medicare program called the Pathways Guide Program. This is a respite program designed specifically for caregivers supporting loved ones with Dementia, Alzheimer's, or other cognitive impairments.

- If eligible, you may receive up to \$2,500 annually to help cover care, allowing you to step away for 4–6 hours while your loved one is safely supported.
- Eligibility requirements:
 - Must have Medicare as your primary insurance.
 - Diagnosis of dementia, Alzheimer's, or cognitive impairment.
 - Cannot currently reside in a long-term care facility.
 - Cannot be enrolled in hospice.

We are proud to share that we are one of only two agencies in the area contracted with this program. If you would like to learn more or determine if you qualify, please stop by, and we will be happy to assist you with enrollment.

Private Duty Care – Flexible Scheduling

Beginning in October, we plan to introduce a new, more flexible scheduling option for private duty care. Currently, shifts are longer, but we are exploring a two-hour option to meet the needs of our residents. Here is how it will work:

- We will complete an evaluation to understand your needs.
- Based on your request, we will recommend the number of care hours (e.g., 2, 3, or 4 hours).

We will share more details very soon, but we are excited to offer this added flexibility.

Flu & COVID Vaccine Clinic

Our department has also arranged for the annual Flu and COVID-19 vaccine clinic in partnership with Bay Pharmacy.

- The clinic will take place in September.
- One location will be the Osborne Center (on the Oaks side), and we are finalizing the Lakeside location.
- Residents are welcome to attend either clinic, regardless of which side they live on.

We expect the clinic to be held the week of September 16; exact dates and times will be shared with you via email shortly.

KENDRA CRISS- EXECUTIVE DIRECTOR OF HOME & COMMUNITY BASED SERVICES

To piggyback on what Jenni mentioned about the Pathways Guide program, it is an excellent resource. Medicare pays for it, and it provides up to \$2,500 in assistance. You do not have to use the funds immediately after enrolling; enroll and use them when needed. If you think you might qualify—meaning you have Medicare, a diagnosis of Dementia or Alzheimer's, and are not currently in a skilled nursing facility—we highly recommend enrolling. That way, if something unexpected happens, such as your caregiver needing a knee replacement and requiring short-term care, this program could cover a stay at Bridgewater for a couple of weeks if necessary. The program really offers a lot of flexibility and options. We have also spoken with representatives from the program, and they plan to host an informational session soon. We are currently finalizing the date. In the meantime, we have flyers available, and we would be happy to share them with you if you would like more information.

On another note, I want to thank Alvin for the new sidewalk through the trees to Outpatient Therapy. That walkway has been a long-standing concern for both staff and residents, especially when navigating the main street exit. It is a relief to now have a safe path available. I would also like to thank everyone who attended the open house. It was a tremendous success with over 150 people in attendance. We appreciate your support. The renovated facility is excellent. If you were unable to join us, you are welcome to stop by for a tour at any time—or even better, come by for therapy.

A quick reminder—Outpatient Therapy offers lymphedema treatment, vestibular therapy, cervical and scoliosis programs, and aquatic therapy through September (we pause aquatic services for hurricane season and the colder months). We are also launching a new neuropathy program. This program has already been piloted at Bridgewater with great success in improving circulation and sensation in the lower extremities; we are now adapting it for use in the upper extremities as well. If you have neuropathy, stop by and learn more about the program—it has been showing auspicious results. I also want to echo Pastor Fred's reminder: please let us know if you are leaving the community, especially in the case of a hospital visit. Please notify Maggie or Rosa directly so that the right people are aware. That way, we can help you plan your next steps—whether that means transitioning to a skilled nursing facility, arranging home health care, or simply returning home safely.

Looking ahead, I am organizing a series of Lunch and Learn events featuring guest speakers. If you have suggestions for topics, vendors, or providers you would like to hear from, please email or call me with your ideas. Beginning next month, we will also be offering monthly "Therapy Talks" in the therapy gym. These will be short, 20-minute discussions on topics designed to benefit you directly. Keep an eye out for those dates soon.

MAGGIE WALSH- CLINICAL LIASON

For those who may not know me, I am Maggie Walsh, your Clinical Liaison. My role is to support the relationship between our community and any clinical services you may need. I visit you in the hospital, help coordinate your care, and ensure a safe transition back to campus. To piggyback on what Kendra and Jenni were saying, it reminded me of something that happened recently. We had two residents who are primary caregivers for their spouses end up in the hospital. Situations like that are why I am such a big advocate for planning. We love you all so much, but many times, you tend to wait until the last minute. Please know—I never mind a phone call, and I'm happy to come to your home to discuss the services available to you. If you are the primary caregiver for your spouse, I strongly encourage you to educate yourself about the resources available on campus. God forbid something happens and you are sent to the hospital—we want to avoid scrambling to make sure your loved one is cared for. Even if you do not use our Home Care Private Duty services, I recommend getting your information on file with them. That way, if a situation arises, something is already in place.

Additionally, please note that the waitlist for our Springwater building is quite long. If you think memory care may be a need for your loved one in the future, please reach out to Amanda, Ingrid, or Amy. They would be happy to give you a tour and place your name on the waiting list. Even if you are not ready when a spot becomes available, you can always decline. I want to stress again: I have no problem with a phone call or a visit to your home. Honestly, that is one of my favorite parts of this job—being able to talk with you and share the resources available to you. I do not usually speak much during these meetings, but since this situation has arisen a few times this week, I felt it was important to mention it. You can always reach me directly. My extension in Home Care is 265, and it rings straight to my cell phone. My cell number is **407-782-8092**. It is also printed on my business cards, which are available at the Lodge (with Ashley), at Lakeside (with Ms. Deborah), and with Alondra. If you do not have one, ask

someone—they will point you in the right direction. Emma can also include my number in the memo for your convenience.

SUE GRATZER- DIRECTOR OF ACTIVITIES

Resident Community Highlights – July & Upcoming September Events

July Highlights:

- Ice Cream Social: Residents enjoyed ice cream sandwiches, root beer floats, and waffle cone sundaes.
- Presidential Visit: President Harry and First Lady Bess Truman spoke in the chapel; a future performance by "Richard and Pat Nixon" was planned.
- Fashion Show: Maxine from Fashion Labels outfitted eight residents; a planned October visit will include shopping and accessories.
- Bargain Hunter Shopping Group: Trips to Eustis thrift stores with lunch; next outing in September to St. Mary's Thrift Store and Habitat Restore.
- Dining Events: Dinner Bunch at Stone Wood Grill; Lunch Bunch at Shiva Indian Restaurant in Mount Dora.
- Entertainment: A jazz trio led by Frank Loss performed, and Lee Kelly presented Dreamgirls in Sanford, drawing 50 residents.
- TED Talks: Topics included AI, generative technology, and innovation in arts and healthcare.

Upcoming Events:

- September 2: Java Social with Dr. Erica DeVore – 9:30 am, Sports Bar (Hearing Aid Technologies & AI Integration).
- September 2, 6:00 pm: Honeybees Choir Performance, Chapel – support our talented resident choir.
- September 5: Resident-Staff Picnic, Lakeside – culinary spread, free for all; pie-eating contest included.
- September 11, 9:30 am: Committee Conversations and Coffee, Sports Bar – learn about committees and recruit new members.
- September 16, 8:30 am: Men's Breakfast at Savor, guest speaker Chief of Police Mike Gibson. Sign up at Lakeside concierge or call Deborah (ext. 508).

Other Notes: The Variety Shop remains open during renovations (closed on Labor Day).

Resident Art Projects using paper bags will be displayed at the picnic.

One fun fact: a sentence shared during the meeting was written by AI!

MICHELL CARROLL- DIRECTOR OF WELLNESS

I am responsible for your physical wellness, overseeing both the Oaks side and Lakeside gyms. The Oaks side gym is not affected by renovations, making it a great place to check out—nice and cool at 70 degrees! Both Kelly Wade and I are here to support you with assessments, orientations, or any physical wellness needs you may have.

Resident-Led Programs:

- **Bone Builders:** Tuesdays and Thursdays, Lakeside community, led by Jane, for strength training at 11:00 am.
- **Tai Chi:** Wednesdays, resident-led program. Benefits include flexibility, balance, and relaxation.

Fitness Classes (Oaks side Gym):

- **Regular Fitness:** Monday, Wednesday, Friday at 8:15 am and 9:00 am. Covers cardiovascular, balance, and strength.

- **Sign-up required** for spacing purposes.
- All other classes are open—come even if you haven't signed up; there is usually room available.

Water Fitness:

- Oaks: Tuesdays and Thursdays at 10:00 am.
- Lakeside: Fridays at 10:00 am.

Yoga:

- **Combo Yoga:** Mondays, Lakeside Essence Lounge, 2:30 pm.
- **Seated Yoga:** Thursdays, 9:15 am.
- **Regular Yoga:** Thursdays, 10:30 am.
- **Combo Yoga:** Tuesdays, 10:00 am.
- Yoga led by Kathy Benton, a long-time vendor on campus.

Exercise with Therapy:

- Wednesdays at Oaks Gym with Physical Therapist Assistant Amy.

Wellness Tips

- **Stay active daily:** Even 12 minutes of walking outside can boost your mood.
- **Physical activity promotes independence:** Take advantage of the wellness programs to help you stay independent as long as possible.
- **Start today:** Do not worry about what you missed yesterday— focus on what you can do today.

How to Get Started

- **Orientation for Gym Equipment:** If you haven't been to the gym in a while or feel unsure about the equipment, schedule a 15–to 20–minute orientation with us.
- Contact us at Extension 304 (Oaks) or 509 (Lakeside) to schedule a time.

Social Wellness

- Play games, read, and talk with neighbors—engage socially as much as physically.
- One thing that makes this community special is how you care for one another. I have witnessed the support and compassion you show your friends and neighbors for 12 years—it truly touches my heart.

ANDREW DUJON- PRESIDENT/CHIEF EXECUTIVE OFFICER

I want to touch on a few things that have already been somewhat addressed today. As David pointed out, we have a benevolence program—but it is essential to understand that this does not mean you can give away all your money and then come to us asking for assistance. That is not how it works. We also recently announced a rate increase last week. Naturally, the first question people ask when rates go up is: *"What do I get for that? What's the value?"* I encourage you to reflect on what has been shared today:

- Fred discussed our Spiritual Wellness programs.
- Maggie shared what we are doing on the clinical side to support you.
- Sue detailed the numerous activities and engagement opportunities available.
- Michell highlighted how she plans to keep you busy and active.

All of these examples demonstrate that we are striving to create an environment that fosters engagement, enrichment, and wellness for our residents.

Rate increases occur for the same reason costs rise elsewhere: gas, groceries, labor, and other expenses all fluctuate over time. To continue providing high-quality services and programs, we must adjust rates accordingly. Our goal, however, is to reinvest as much value as possible back to you through these

engagement and enrichment opportunities. Most budget line items for 2026 are holding relatively constant. However, several departments—primarily the culinary and activities departments—received substantial budget increases to enhance your experiences, whether through meals, events, or other programs.

Updates on Key Projects

Lodge Renovation:

- Bids are expected to come in next Tuesday.
- We will review them on Thursday and select a contractor.
- Work is scheduled to begin the following week and be completed before Christmas.

Spectrum Contract:

- Progress has been delayed due to illness within the Spectrum office.
- They now hope to resolve the contract issues early in September.

Next week, on September 4, we will be sending out our resident satisfaction survey. The survey focuses on Culinary, Security, Grounds and maintenance, Housekeeping, Activities, and Wellness programs. This survey is not designed to gather detailed information, such as nutritional values on specific menus; those will be addressed in separate surveys if needed. You will have the opportunity to answer the standard questions and provide additional comments, questions, or concerns at the end. We will carefully review all feedback and take action where possible, whether through the standard operating budget or capital expenditure budget. Choosing to live at Waterman Village is about more than purchasing a home. You are investing in a lifestyle that promotes independence, engagement, and well-being, while freeing yourself from the challenges of homeownership. Our goal is to help you live your best life while we take care of the rest.

Respectfully submitted,
Ashley Morris
Lodge Administrative Assistant