

June 6, 2025

Dear Residents, Families and Staff:

Many thanks to all who attended our second quarter resident Town Meeting yesterday as well as the Employee Town Meetings. Our Leadership Team provided comprehensive updates and summarized answers to questions. Earlier in the day, it was shared that Brock Nichols, Director of Campus Operations, has accepted a new position and will be leaving Dunwoody. There is a transition plan in place to ensure the continuity of all projects, including the pickle ball and bocce courts. The Dunwoody community wished Brock well and thanked him for his excellent service to Dunwoody Village.

Best regards,
Maureen Casey

The minutes of the Town Meeting are included below:

President/CEO, Maureen Casey

Last year, in addition to celebrating our 100th of the Dunwoody Home and the 50th anniversary of Dunwoody Village, the Board of Trustees focused on our Mission, Vision and Values. By engaging residents, staff and families, we were able to make important modifications to our Mission, Vision and Values.

This year, the Board of Trustees committed to Strategic Planning related to healthcare, which includes skilled nursing, personal care and Health & Wellness. As such, 3 work groups were formed including: Healthcare, Technology and Dunwoody 2040. Dunwoody 2040 is a visioning group looking out 15 years, but Healthcare and Technology are focused on 3-5 years out. The Committees include Trustees, Leadership and Residents. We are also engaging an experienced Strategic Planning Consultant who has worked with not-for-profit CCRC's to support the process.

Work continues on the Resident Engagement Survey Results. A work group of volunteers has been formed. Residents volunteered by signing up, emailing Maureen and notifying their neighborhood ambassador. The first meeting was June 3rd.

The purpose of the Work Group is to:

- Review the results of the Resident Engagement Survey
- Identify top resident concerns as indicated in the survey
- Develop a plan to glean more information from residents, using an inclusive process
- Share information gathered with DVRA and related committees
- Support an action plan
- Monitor outcomes
- Report results back to residents and Repeat

The Work Group will be conducting Focus Groups to gather as much input as possible from residents. The first of the Focus Groups is scheduled for June 13th and June 16th at 1pm in the Auditorium. The work group will share results with other relevant committees for their input and support. Members include: Co-chairs: Tim Conahan and Barb Keyser; Judy Geoghagan, Berta Britz, Elaine Patrikas, Lisa Twitmyer, Lynn Mailey, Dick Poli, Gloria Coia, Norma Winther.

Director of Human Resources, Curt Sayers

Recruitment activity

As a result of the Crozer Health System closing two area hospitals, Dunwoody Village has partnered with Career Link to attempt to hire some of the nearly 2,300 displaced employees. A job fair was held on 06/13/2025 at Subaru Park in Chester, PA. Nearly 200 employers attended with Dunwoody Village being one of only a few CCRCs that participated. As of today, we have hired 5 former Crozer employees in various care center positions. We will continue to partner with Career Link to hopefully hire even more of these highly qualified individuals.

Relias update

As announced in the last Town Meeting, Dunwoody Village has partnered with Relias – a leading provider of online training programs for CCRCs across the country. The response from employees has been overwhelmingly very positive. The first training module assigned – “About Infection Control” – has been completed by 95% of our employees. Many more training modules will be assigned to our employees as we move to a mostly online training program. Some trainings will still occur in person, but Relias is certainly providing flexibility for our employees as they complete their annual mandatory training requirements.

Director of Marketing, Monica Knauss

- The 2024 Annual Report is at the printer and we expect it any day now!
- **Dunwoody is hosting a Red Cross Blood Drive** on June 22nd in the Auditorium, open to residents, staff and the general public. Residents who are interested in volunteering, either as part of a “welcome center” or with canteen refreshments, please see Madison Abelson.
- Calling all photographers: the Marketing Department has a photography project we’re exploring, and we are looking for interested resident photographers for an initial meeting to share ideas. If interested, please let me know.
- As of May 31, we have had 13 residential move-ins with entrance fee deposits year-to-date totaling approximately \$3.6 million. We anticipate 7 additional move-ins during June.

Director of Community Services, Josie Singer

Gift Shop

The Gift Shop was successfully reopened in the Main Lobby In March, and Marion continues to set beautiful staging for the gifts, treats and greeting cards. The current hours are Monday through Friday from 11:00am to 2:00pm. We so very much appreciate our current resident volunteers but are also asking for additional volunteers with the intent of increasing our hours of operation. We know that setting schedules is difficult during the summer months but would like to create a list of volunteers that can be added when September rolls around. Consider volunteering for a day or two around dinnertime when many residents are travelling through Hearthside; or, consider a Saturday. In the past, the Gift Shop also was open for half-days on Saturdays. It is such an aesthetic addition to our Lobby. Residents and families would love to browse and shop during a weekend visit.

Reception Desk

Jean DiStefano, our lead receptionist asks that you remember to wear your name tag for the first week of the month. She would like to remind residents to please fill out the Vacation form if away overnight, even if it is only one-day. As always, please remind your guests to sign in with Accushield before entering the facility. Checking in and wearing the name tag helps improve our security for all residents and staff.

CFO, John Dubyk

2024 Annual Audit Highlights.

- On April 2nd Clifton Larson Allen LLP presented a draft of the 2024 Dunwoody Village Consolidated audited financial statements that was board approved at its April 16, 2025 board meeting.
- CLA presented that they were issuing an **unmodified** Audit Opinion for the consolidated financial statements.
- Their audit results noted:
 - no material weaknesses and no significant deficiencies.
 - no significant events or transactions,
 - no audit adjustments posted or passed
 - no subsequent events to report
 - no difficulties during the audit
 - And Dunwoody Village met the Debt Service Compliance requirements.

Financial Statement Update

Mr. Dubyk provided a handout of the Financial Report and noted the importance of the following trends.

- **Total Cash and Investments (Line #3)**
 - Cash and Investments have increased from \$49.4M to \$54.5M from year end to 2021 to 2024 (or 10% during that period).
 - 2025 Total Cash and Investments have decreased \$1.7M to \$52.8M largely impacted by a \$898K unrealized loss on investments and building improvements
- **Capital Improvements (line #5)**– thus far in 2025 we have spent \$2.4M on Building Improvement reflecting the large number of turnovers.
- **Entrance Fee Deposits (line #7)** – Dunwoody has received \$2.76M of Entrance Fees as of April 30th.
- **Net Assets (line #9)** - have increased from \$35.9M in 2021 to \$44.2M in 2024 or 23% during that period.
- **Total Revenue (line #15)** – April 2025 total revenue fell short of the budget by \$246K which includes the \$898K unrealized loss.
- **Total Expenses (line #27)** – April 2025 total expenses exceeded budgeted projections by \$600K. Key factors in this unfavorable variance:
 - Electric - \$134.5K is a direct result of a .029 cent per kw hour effective 1/15/2025 and our KW usage in February alone was 286,114 over last year. February temperature was, on average, 7 degrees lower in 2025.
 - Agency Nursing was \$58.5K over budget projections.
 - Equipment Maintenance has a \$176K YTD variance
 - Employee Group Health is \$180K higher than budgeted projections based on increased usage of our plan.

John also introduced and welcomed our new Director of Finance, Taci Damstedt.

Director of Dining Services, Julia McCartha

Meal Service Summary – May 2025: In the month of May, Dining Services provided a total of **22,095 meals**, broken down as follows:

- Skilled Nursing: 6,543 meals
- Personal Care: 6,963 meals
- Residential Living: 7,260 meals
- Employees: 1,062 meals

- Guest Meals: 267

May Dining Highlights

May was a busy and exciting month filled with special events and celebrations:

- On May 3rd, we kicked off the month with a Kentucky Derby celebration in the Fox Den, complete with themed décor and activities.
- On May 5th, we celebrated Cinco de Mayo with a Margarita Special served in the Fox Den.
- On May 11th, we hosted a successful Mother's Day Brunch in the Auditorium, attended by over 120 residents.
- On Memorial Day (May 26th), we featured a festive Burger Action Station during dinner.
- Throughout the month, residents enjoyed Phillies Game Specials in the Fox Den, including \$1 Point Hot Dogs and half-off selected beverages.
- We also held menu tastings for residents in Woodlea and Leeland to gather feedback and enhance our Personal Care dining experience.
- Additionally, we are in the process of revising menu descriptions for our Hearthside dinner menus to ensure greater clarity and better highlight ingredients, dietary accommodations, and preparation details.

Upcoming Events

Looking ahead, we have several exciting events planned for June:

- Father's Day Brunch will take place on Saturday, June 15th in the Auditorium. Reservations can be made through FullCount.
- On Wednesday, June 18th, we will host our Employee Appreciation Picnic from 11:30 a.m. to 1:30 p.m. in the Auditorium. During this time, lunch service will continue as usual in Hearthside for residents.
- Later that day, on June 18th from 4:30 p.m. to 6:30 p.m., we will host our Resident Picnic. This event will be held indoors, with food stations set up throughout the lobby area. Residents are welcome to enjoy seating in the Fox Den, front of Hearthside, and the Auditorium.

Director of Campus Operations, Brock Nichols

J-Hall Renovation and Community Center Artwork

The new Administration and Marketing Wing, which includes the Club Room and Board Room, are complete and fully operational. Also, additional artwork and furniture has been installed in the lower-level of the Community Center HUB. We are in the process of reopening the two meeting spaces in the lower-level (previously the temporary Marketing Office).

Community Center Elevator

The repairs to elevator 9 are complete. We are awaiting the inspection from the state to put the elevator back in service. We appreciate your continued patience.

Lower-Level Renovations

The ceiling, painting and flooring for the lower-level corridor from the HUB to Health and Wellness is complete. The employee computer lab is also up and running. We are working to finalize the employee break room (opposite the computer lab) to have this open and accessible soon.

WIFI Project

The replacement of the Wireless Access Points (WAPs) is over 75% complete. We will be coordinating the replacement of the switches (which feed the signal to the WAPs) soon. When the project is complete, we expect to have around 100Mbps download and 80Mbps upload speeds. We will not recognize this until the full project is done including the circuit replacement. There will be scheduled outages to coordinate this work. We have engaged NCI (contracted installer) to provide additional support to help get resident ancillary devices connected (i.e. printers, digital picture frames, speakers, etc.). We are also working on a joint project with Comcast and Verizon to provide greater bandwidth internet WIFI service to the campus. Much of the preparation work for this has been completed with the final connection to be done in the next few weeks.

Lobby and Packages

We are currently working on a full-scale package storage/delivery program to not only make resident access easier but will also help clean up the front lobby area of packages. Package and lobby carts with the Dunwoody logo are being considered. We need to figure out a full process for the carts concerning storage, tracking, returns, etc.

Outside Doors and Security

Door monitoring has been added back to the Security Guards' rounds to have the breezeway doors unlocked between the hours of 6:00 AM and 9:00 PM with the exception of doors 2 & 3. These remain locked 24/7 but are accessible internally via the push button function. We recently discovered some mechanical issues that are being addressed with some of these doors. In addition, Ted Cannon and Brock spoke about the need to provide education to the Security Team concerning doors propped open and to work on training for overall situational awareness and specific checkpoints. Long term, we are looking at expanded Access Control measures to alert us when doors are propped for any period of time.

WorkHub

Work Hub response time --3,502 Work Orders Completed as of 6/4/2025

- Same Day: 57.5%
- Next Day: 16.7%
- 2 Days: 4.1%
- *This means 78.3% of work orders are completed within 2 days*
- 3-5 Days: 9.0%
- 6-10 Days: 5.6%
- 11+ Days: 7.0%

Certain requests are handled quicker than others. Fastest Response Times (over 50% completed same day):

- Emergency
- HVAC
- Medical Equipment
- Elevator
- Plumbing
-

Auditorium Light

The light above the front of the stage is scheduled for repair tomorrow.

Staffing Changes

We recently welcomed Ernest Henry, Assistant Director of Campus Operations, and Ted Cannon, Safety and Security Manager, to the Operations department. Ted will be developing our safety and security policies and practices while improving our overall Emergency Preparedness awareness. Ernest will oversee the daily activities of the Maintenance, Grounds and Environmental Services Departments to help give more structured management and coordination. Both Ted and Ernest bring over 20+ years of experience to their respective roles. In addition to these changes, Brock Nichols, assured residents that although he will be leaving his position as Director of Campus Operations here at Dunwoody effective Thursday, July 3rd, a transition plan is being developed to ensure continuity of services and projects. Brock commented that he has gained great experience and has enjoyed working with his team and serving the Dunwoody community of residents. He thanked everyone for their hospitality during his time here and wished everyone the best.

Director of Health & Wellness, Kim LaFountain

The Health and Wellness Department is hosting a COVID Booster Clinic on June 9th in the Health and Wellness Department. We have made reservations for those that communicated they wanted to receive their booster at Dunwoody Village. Phoebe Pharmacy will be administering the vaccine, and our staff will be doing everything possible to execute the event smoothly. We have over 180 people that will be coming through the department that day, and we have printed out a schedule of times to help alleviate wait times. We have distributed consent forms to everyone who signed up, and we ask that you come with those forms filled out and signed. Please wear a short-sleeved shirt and be prepared to wait for 15 minutes to be observed for a reaction. Dr. Lawrence has recommended that residents receive a dose if it's been more than 6 months since their last dose. Our last clinic date was this past November. If you have had active COVID in the past 60-90 days you are likely to have immunity and can postpone receiving a dose.

Our department is working on another project which is the updating of resident medication lists. We are tackling this initiative by the month of the year people were born. By now, everyone with a June birthday has received a letter from Kim explaining the request for an update and a copy of the medication list we currently have on file for them. We are requesting people return the list with additions or deletions by the last day of the month. We are doing well with people complying, and any stragglers receive a follow-up phone call with a second request. We began this project in February, and we will be circling back to people who have a birthday in January. The goal is to at least have each person's list updated annually. If you have a birthday that we have not gotten to yet, by all means feel free to request a copy of your medication list to update or make an appointment with a nurse who can review things with you. We very much appreciate your cooperation with ensuring your information is as accurate as possible. It is the responsibility of residential living residents to maintain an accurate medication list for their charts.

Director of Personal Care, Adrienne Stevens

Exciting updates are happening in Personal Care! We are pleased to announce the addition of Dorene Van Luvender as the Personal Care Nurse Manager. Dorene brings a wealth of knowledge and experience, and her impact is already being felt. As we continue to prioritize excellence, it's vital to remain DHS State Ready today and every day. This means following all regulations, staying prepared, and, above all, always prioritizing the needs of our residents.

The long-anticipated bathroom renovations on Woodlea and Leeland have been completed, with a total of 41 bathrooms fully renovated since the project began in 2023. We celebrated this major milestone on June 4, 2025, marking a significant improvement in resident comfort and aesthetics.

Additionally, we're proud to announce that the Transitional Care Model (TCM) is based on the University of Pennsylvania model and adapted here at Dunwoody Village Personal Care. All individuals moving into personal care are now being included in the model. This innovative approach will be presented at LeadingAge PA on June 12, 2025, by our very own Kimberly LaFountain, RN, BSN; Adrienne Stevens, LSW, PHCA, CDP; and Gail Volz, BSW.

Director of Dunwoody at Home, Adrienne Stevens

Dunwoody at Home is proud to announce a deficiency-free state survey, completed on April 1, 2025, an outstanding achievement that reflects our commitment to quality and excellence in care. In addition to this success, we're excited to share that Dunwoody at Home will soon be relocating to the Health and Wellness area. Stay tuned for more details on this exciting transition as we continue to enhance our services and accessibility for the Dunwoody Village community

Care Center and Skilled Nursing Updates

Director of Health Services, Laura Smith, and Director of Nursing, Allison Dent

On May 16, 2025, a new Director of Health Services joined the organization, bringing fresh energy and a strategic lens to Skilled Nursing operations. Since stepping into the role, the focus has been on quality assurance, team development, and elevating the resident experience—especially in alignment with organizational and departmental goals.

Also in May, the Care Center team celebrated Nursing Home Week with great energy and appreciation. Staff enjoyed a week full of engaging events including a Coffee and Kudos party, an Ice Cream Truck, raffles, and a visit from Zac's Food Truck—where leadership even stepped in to serve. It was a meaningful way to thank the team for their dedication and contributions.

As part of our compliance program, FSA, our external compliance and quality partner, conducted a review of our Quality Measures (QMs). Quality Measures are indicators used by CMS (Centers for Medicare & Medicaid Services) to monitor key aspects of clinical care, such as rate of falls, pressure ulcers, hospital readmissions, and vaccine adherence. These measures directly impact our Five-Star rating, public reporting, and survey outcomes. We are pleased to report that the FSA review found our QMs to be in good standing, with no corrective action required at this time. This reflects a strong foundation in clinical care and positions us well as we move forward with continuous improvement efforts.

The Skilled Nursing team has been actively advancing the departmental goals outlined in our 2025 Action Plan. These include:

- **Montessori Integration:** We are relaunching our Montessori-based programming, beginning with a root cause analysis to identify and address barriers from previous implementation efforts.
- **Sepsis Protocol Improvement:** Collaboration with our Medical Director and PointClickCare (PCC) is underway to develop a best-practice sepsis response aimed at reducing hospitalizations. Skilled Care is also aligning with a Sepsis Prevention Program, recognizing that sepsis is one of the leading causes of death in U.S. hospitals, with over 1.6 million diagnoses annually. Research suggests up to 80% of these deaths could be prevented through early diagnosis and intervention. We are reviewing current tools

and resources to implement a stronger, proactive sepsis program across Skilled Nursing and Long-Term Care.

- **Admission Readiness:** Interdisciplinary huddles occur daily, and a digital document platform (DocuSign) is in the process of being implemented to streamline contract signatures.
- **Inventory Management:** We are currently exploring what is required to implement inventory tracking software. The goal is to enhance charge capture, improve tracking, and standardize inventory ordering processes.
- **Medical Record Digitization:** Conversation has started to determine needs to transition to fully electronic records. A partnership with DeVry University is being explored to leverage intern support for document scanning and data migration, while PCC has been engaged to guide implementation timelines.
- **Staff Development:** A “Back to Basics” education series is in development to reinforce core nursing competencies. Relias has been initiated as an education training module. Additionally, the clinical team has launched a monthly newsletter featuring important updates, communication highlights, fun facts, and staff recognition. We extend appreciation to Kathy for leading this initiative and keeping morale strong through consistent, positive messaging.
- **Survey Readiness:** Monthly audits and mock surveys are being conducted, with an emphasis on reducing citations and documentation trends analysis through QAPI data management. In alignment with updated federal regulations, the team also implemented a new informed consent policy under F757. This requires documentation in the medical record that the resident or representative was informed of the risks, benefits, and alternatives to proposed care and made their own informed choice. The policy was developed in collaboration with our clinical team and Medical Director, Dr. Lawrence.
- In addition to the strategic clinical initiatives, recruitment and retention remain central priorities. Efforts are underway to stabilize the workforce and reduce turnover, while also creating opportunities for internal growth and cross-training.

Another exciting clinical advancement is our new partnership with Healing Partners, a leading wound care provider. They bring a holistic and collaborative model to wound care, including a dedicated practitioner, education for staff and residents, and integration with PointClickCare to support our move toward paperless documentation.

A major area of focus has been the enhancement of the culinary experience in Skilled Nursing. The Patten and Pavilion dining room has received a physical refresh. The goal is to relaunch these spaces as inviting, resident-centered environments that support both meals and engagement activities. A collaborative approach is being used—meeting with staff to ensure workflows align and that residents have opportunities to dine in a more social and comfortable setting.

Collectively, these efforts represent an integrated approach to clinical quality, operational efficiency, and resident-centered care. The Skilled Nursing team remains committed to achieving the broader organizational goals while continuing to build a culture of excellence and compassion.

Ms. Smith assured residents that she continues to work with our new Physical Therapy provider, Functional Pathways, to ensure that residents receive a high-quality of service.

The meeting adjourned at 5:30pm and residents enjoyed wine and cheese.