

BRANCHING OUT

LIVING BRANCHES

Live & Grow – Together

A photograph of a woman and an elderly woman sitting together and looking at a photo album. The woman on the left is wearing a grey and white patterned vest over a grey long-sleeved shirt. The elderly woman on the right is wearing a black top and a red skirt, and is holding the photo album. They are both smiling and looking at the photos. The background shows a living room with a couch and a window with a plant.

OUR MONTESSORI *Journey:*

A Personalized Approach
and Purposeful Living
in Memory Care



FROM THE PRESIDENT'S DESK

EMPOWERING MEANINGFUL LIVES

SINCE THE CREATION OF LIVING BRANCHES, we have often focused on two words from our mission statement: purpose and joy. They seem to truly epitomize what life at Living Branches, and in general, are all about. Many of my columns in Branching Out are related to this idea of empowering residents and I often reflect about finding each person's "reason to get out of bed in the morning" with residents and staff. In 2019 we took this part of our mission a step further.

It is our goal that Living Branches be known as a premiere provider of Memory Care services in our region. Kathleen Roberts, director of dementia care strategy, was charged with researching various philosophies of care to find the one that captures our culture and mission. Ultimately we selected Montessori. What is commonly known as an educational methodology for young children is revolutionizing life for persons with Alzheimer's disease and dementia.

We initially introduced Montessori to the Memory Care areas within Living Branches, but this philosophy truly is for all residents. It is our approach to care – whether it be for someone who has recently retired and moved to our community, or for someone in the later stages of dementia.

In this edition of Branching Out you will learn more about how Montessori is integrated at Living Branches and how it is effective. The overarching idea is that we want to do more than provide services to residents. We want to partner with residents so they can live meaningful lives. By understanding their interests and passions, and engaging them in those things, we are able to walk alongside residents and empower them to live lives that are worthwhile at every stage of their life.

Over the last few months I have heard many stories from staff about the impact that Montessori is having in our communities and I have observed it first-hand myself. I am grateful for the work that has been done to implement Montessori into our culture and I am pleased to know that the words of our mission statement are truer today than ever before.

Edward D. Brubaker

EDWARD D. BRUBAKER
President/CEO

BRANCHING OUT

A PUBLICATION OF LIVING BRANCHES

Together we empower older adults and families to lead lives of purpose and joy, guided by the Mennonite tradition of care and service to others.

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EDITORIAL STAFF

Alexandra K. Metricarti, Editor-in-Chief
Rebecca L. Kikendall, Managing Editor

Contact Branching Out at 215-368-4438 or
BranchingOut@LivingBranches.org

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EDITOR'S NOTE: Pictured here and on the cover is Michelle Moreland, life enrichment coordinator, with resident Louise Detweiler who passed away in December 2019, shortly after these photos were taken. Louise was loved by many staff persons and made an effort to know the name of each person who cared for her. She loved calling Souderton Mennonite Homes her home and even brought some family members along with her; her grandson works in dining services. Louise is greatly missed and we are grateful to her family who gladly gave permission for the photos to be used in this edition.

OUR MONTESSORI *Journey:* A Personalized Approach and Purposeful Living in Memory Care

By: Danielle Leheny

DOCK WOODS
RESIDENT
JOYCE SHULTZ
HAS ENJOYED
MANY
WONDERFUL
EXPERIENCES
WHILE
VOLUNTEERING
HER TIME AT
COUNTRY
COTTAGE,

one of the community's Memory Care areas – but a favorite moment will always shine in her heart. It began one usual afternoon as soon as she walked into the Country Cottage community room, where she was treated to a beautiful scene.

“Almost all of the residents were relaxing in the room, listening to Seth Laucks, our music therapist, play the guitar and sing,” said Joyce. “Two of the residents were sitting and chatting quietly with their visitors. A nurse was tenderly braiding the hair of another resident. One cheerful resident was singing happily with his wife. There were so many lovely individual interactions happening in the room, and yet, the atmosphere was also filled with a sense of community and togetherness.”

JOYCE RECALLS THAT IT WAS ALMOST AS IF THE MOMENT WAS DESIGNED TO UNFOLD THIS WAY,

and in a sense, it was. This shared experience – and countless others like it – are the result of the new Living Branches Montessori program. The program aims to build environments that are adapted to support memory loss and sensory impairment, and to promote a higher quality of life. A Montessori approach also encourages residents to engage in activities aligned with their personal interests and previous roles. This facilitates independence via offering choices and opportunities for meaningful engagement to contribute to the community, creating purpose and a reason to greet each day with anticipation.

Since the program launched this past spring, the Living Branches staff – as well as a growing group of resident volunteers – have committed to bringing the Montessori approach to life at Living Branches. Their efforts have enriched the experiences of residents and sparked a beautiful array of special moments like the one Joyce was eager to share.

These unique stories are where our success with Montessori truly lives, but before we highlight more personal accounts from our staff and volunteers, we’d like to offer some background on Montessori – and explain its perfect fit with the Living Branches philosophy of care.

MONTESSORI – WHAT, HOW, AND MOST IMPORTANTLY, WHY

In the early 1900s, Dr. Maria Montessori, one of Italy’s first female doctors, opened the Casa dei Bambini (Children’s House) to provide education to low-income children in Rome. Rather than using traditional teaching methods, Dr. Montessori began testing her own child-centered educational theories in the classroom – which focused on educating each child based on their development stage. She supported her students in taking ownership of what they wanted to learn and worked with each child to create a personalized education that played to that child’s strengths. Students were encouraged to cooperate and work together to accomplish their goals.

Montessori found its way to America soon after its launch in Europe, but didn’t gain full traction until the late 1950s, when it was revived by parents and teachers who were passionate about finding a better way to educate their children. Today, a wide array of Montessori schools in the U.S. utilize this unique teaching method to build children’s confidence, creativity, and love of learning.

But Montessori isn’t just for children! Montessori is a wonderful approach for lifelong learning at any age. Within the past five years, there has been a growing movement to apply the Montessori approach to seniors living with dementia – and the results have been extraordinary.

So, it’s not surprising that when Kathleen Roberts, director of dementia care strategy at Living Branches, began searching for an innovative approach to Memory Care, Montessori quickly topped her list of possibilities.



“There are a range of philosophies and approaches to Memory Care, but Montessori most closely aligns with our culture, our values, and our commitment to meeting the individual needs of our residents,” said Kathleen. “Montessori empowers the resident to figure out what they want to do, and this was unique to any other approach.

The Montessori philosophy supports the atmosphere of empowerment and collaboration we strive for among staff, residents, and family members. We want to be care partners versus solely care givers.”

In a Memory Care context, Montessori relies on two key steps. Staff first work to identify a resident’s preferences, including the hobbies they enjoy, personal interests from their past, and roles they’ve held in their lifetime. If a resident had been a farmer, for example, they may want to get involved in gardening or be outside in the fresh air. If a resident was a homemaker, they might find comfort in helping with meal preparation or folding laundry. And if a resident enjoyed music, they might enjoy listening to favorite songs from their youth.

“Some of our Memory Care residents may not be able to talk about what they had for breakfast, but many are happy to share memories of their favorite Christmas traditions

MONTESSORI STORIES FROM OUR TEAM

The Living Branches staff members were eager to share their favorite Montessori moments to highlight the many ways this new approach to Memory Care has touched the lives of residents and caregivers alike.



MICHELLE MORELAND
LIFE ENRICHMENT COORDINATOR
Souderton Mennonite Homes Health Care

“I like to create signs with five fun facts about each resident, so that any caregiver who enters their room has an ‘ice breaker’ to kick off the conversation. Those facts come in handy in other ways too! For example, we had a resident who kept forgetting her walker when moving around – and we knew she really loves Johnny Cash. So, we printed out a great picture of Johnny Cash, laminated it, and tied it to her walker. She rarely forgets it now, and she always points to the picture and says, ‘That’s my boy!’”



DONNA BARTRAM
RESIDENT ASSISTANT
Country Cottage

“A big part of Montessori is maximizing the environment for our residents – which can sometimes mean creative problem-solving. We had one resident, for example, who kept bumping her head while trying to roll her wheelchair under a kitchen counter. Woodworking volunteers, Sam Lapp and John Dearden, solved the issue by designing and building a shelving unit in that area. No more bumped heads – AND we have another place to store easy-to-access activities for our residents in the community room.”



CAROL WITHERS
LIFE ENRICHMENT COORDINATOR
County Cottage

“Our commitment to Montessori has closed the gap between caregiver and resident. In learning more about their lives, I feel more comfortable sharing fun updates about my own life, such as stories about my foster dogs. We also spend a lot of time creating things together with residents, such as our holiday decorations. I love seeing how happy it makes the residents to show their family members the decorations – and say, ‘I helped make that!’”



BRITTANY SCHRANDT
CLINICAL EDUCATOR
Shared Services

“I’m a huge fan of the memory books. I remember one special moment where the wife of a resident was brought to happy tears to see her husband talking about his favorite boating memories, after looking at a picture of his old boat. We were all asking him questions, like ‘What were your favorite things to do on the water? What did you cook on the boat?’ With every question, he grew more and more animated in his answers – and his wife was so clearly filled with joy to share in those memories.”



SERENA EDNER
DIETICIAN
Dock Woods

“I love playing creative games with the residents. One resident enjoys a color-matching game with cotton balls. Other residents really like to play with these colorful card sets the staff members create. The sets are themed to match residents’ interests; as an example, one set is about types of flowers, and residents are encouraged to match the name of the flower to the correct picture. And since they align with interests, the cards are also a great opportunity to spark conversations. We use the flower set, for instance, to chat with our gardening fans about their favorite blooms and their passion for making things grow.”

A TEACHER RETURNS TO HER CAREGIVING ROOTS TO “HANG OUT” WITH RESIDENTS

In 1963, Joyce Shultz became the first special education teacher in the North Penn school district. All these years later – and now a resident at Dock Woods – she is truly excited to be part of yet another new, innovative caregiving program, this time in Living Branches Memory Care.

“When Kathleen first introduced the idea of Montessori at Living Branches, I immediately knew I wanted to be a part of the journey,” said Joyce.

Joyce and a group of volunteers (that Joyce helped recruit!) found immediate rewards in their time at Country Cottage. At first, they didn’t know what to call the program, but when a staff nurse thanked Joyce and the volunteers for “hanging out” with the Harmony House residents one afternoon, the name clicked.

“That’s really what it is: ‘hanging out,’” said Joyce. “One of our volunteers loves to sing, for example, and every Friday afternoon, she and one of the Harmony House residents sing their hearts out for about an hour. Another volunteer spends a lot of time talking to a resident about airplanes and the military; the resident had been a pilot in World War II, and the volunteer has a son-in-law and a sister in the Air Force – so they discovered they have a lot in common. These lovely matches and interactions are a wonderful thing to witness.”

Joyce and the growing number of volunteers who have joined her are excited that their “hanging out” success will be used as a model for inviting more Residential Living residents to volunteer their time with residents in other Living Branches supportive living areas.

“Our stories and learnings keep growing,” said Joyce. “When we first started volunteering, we were given more direction as to how to interact with the residents – but now, we’re all having individual ideas of our own. This enhances the experience of simply ‘hanging out’ and has opened the door for even more special moments, shared connections, and community togetherness.”



or summer vacation activities with their parents when they were children” said Kathleen. “Part of the Montessori discovery process is figuring out what lights up each individual.”

The second step is for staff members to perform an abilities assessment for each resident, to determine current capabilities including dexterity, reading skills, readable font size and ability to follow instructions. For example a resident may love music, but their hearing might be impaired – and fortunately, if we put our creative hats on, there are always ways to meet residents where they are with the things they love.

“Once we have both pieces of information – interests and abilities – we can begin collecting and putting together the preferred items and activities to create a prepared environment for each resident,” said Kathleen. “What they love to engage in has to be accessible, so that the resident can select meaningful ways to spend their time and make choices so as to maintain as much of their independence as possible.”

A prepared environment includes memory, visual, auditory, and tactile cues – not just in the resident’s room, but also everywhere they go, such as the community and dining rooms. Wayfinding cues, such as colorful signs, can support residents in getting from one place to another. Snacks are available in a way that encourages residents to help themselves, and large-print name tags allow residents to more easily identify staff and family. Hands-on activities (with signs inviting residents to participate) are easy to access. A resident who loves puzzles, for instance, will see a sign inviting engagement that says “Please put together this puzzle.” Another resident who finds comfort in prayer will have easy access to a rosary and will be encouraged to pray with others.



“The old way of thinking, the medical model, focuses on what people living with dementia can no longer do. Instead, we want to focus on remaining abilities, what they still can do,” said Kathleen. “We love asking our residents, ‘What are three things that bring you joy that you most want to do?’ By focusing on the abilities they still have, we can offer purpose, help maintain their identity, and rekindle passion for what brings them joy.”

GETTING STARTED AND GETTING TOGETHER

Kathleen and the Living Branches team formally kicked off their commitment to Montessori in spring 2019 with an introductory two-day session for about 50 staff members and volunteers.

The session was led by Jennifer Brush, an award-winning dementia educator, author, and consultant. Jennifer’s work has taken her around the globe, in front of audiences in South America, Australia, Israel, Singapore, throughout Europe, and to Washington, DC to offer advice about health care policy. Not only is Jennifer passionate about the possibilities of the



Montessori approach in dementia care, she also serves on the Association Montessori International (AMI) Advisory Board for Montessori for

“Traditionally a big part of a caregiver’s role, especially in Memory Care, are routines and structured tasks. Montessori, on the other

The old way of thinking, the medical model, focuses on what people living with dementia can no longer do. Instead, we want to focus on remaining abilities, what they still can do

Aging and Dementia – and is the only AMI Certified Educator for Montessori for Aging and Dementia in the U.S. We have been quite lucky to benefit from her expertise, guidance, and support!

Following the session Jennifer has also served as our implementation project manager – checking in with the implementation teams on their progress, and supporting us on all deliverables, challenges, and overall change management.

“There’s definitely a culture shift needed for our commitment to Montessori,” said Kathleen.

hand, requires more flexibility and customization. We were fortunate to see the lightbulb turn on during Jennifer’s session for our early adopters. Those staff members have helped greatly with our initial success stories – and have supported and encouraged other staff members in the change process.”

A big part of the team’s success has been, quite simply, testing out new ideas. As an example the staff has worked with residents and family members to create memory books filled with photos and simple labels that highlight the favorite people,

places, interests, and activities from each resident's life. The books have sparked countless conversations between the residents and staff, as well as between the residents and their family members.

"It's delightful to see the residents' faces animate when they flip through their book – and to witness their family members connecting with their loved ones in a new way," said Carol Withers, life

on Montessori as the philosophy of care for Living Branches. Today, Joyce, as well as the other residents she has helped recruit, volunteer their time with Memory Care residents on a regular basis.

"I knew a lot about Montessori because my grandson was part of a Montessori school in pre-school and kindergarten," said Joyce. "I saw him blossom with pride over what he was learning – and his influence

in what he was learning – so I understood the positive impact of this individualized teaching method. It's also been a pleasure to witness a similar positive impact for both Memory Care residents and

volunteers. Each volunteer has wonderful stories about how they've supported residents in enjoying the things they love – whether they pray with the resident, play a game together, or simply encourage them to talk about favorite memories from their youth."

Recognition of successes – both big and small – has also been critical to embedding Montessori in the Memory Care culture.

"I helped create a Montessori Mentions board in the community room," said Michelle Moreland, life enrichment coordinator, Souderton Mennonite Homes Health Care. "When we see a staff member living the Montessori approach, such as encouraging a resident to try a favorite activity or engaging them in a personal dialogue – we add a star cutout with a brief description to the board to highlight their efforts."

"The ripple effect of recognition is huge," said Kathleen. "Our commitment to Montessori is a journey, not a destination. We have an amazing team of Montessori Mentors who are making a huge difference for our residents and it is beautiful to see. By highlighting the special wins that bring Montessori to life for our residents, we recognize our staff members for their efforts, inspire others to try new ideas, and move further along on our journey to enhance the experiences of our residents – a win-win-win!"

Inviting residents to contribute to the community through roles and activities aligned with their interests is an important part of the Montessori vision.

"The residents find meaning and purpose in helping the community, and those who are able to participate look forward to their work," said Donna Bartram, resident assistant, Country Cottage. "One of our residents is 104 years old. She's as sharp as a tack, and most days, she volunteers in the mornings and afternoons to help set up the tables for mealtime. She rolls the silverware in cloth napkins, and quite frankly, she does a nicer job than the staff members do!"

Speaking of community involvement and back to Joyce from the beginning of the article, the Living Branches volunteers have also played an integral role in many Montessori successes. Joyce, who serves on the Living Branches dementia care strategy board of advisors, was part of a sounding board for Kathleen's early thoughts about the Memory Care approach – and for her growing plan as she was deciding

The residents find meaning and purpose in helping the community, and those who are able to participate look forward to their work.



THE MONTESSORI JOURNEY CONTINUES

In the next few months Living Branches will begin to expand the team's Montessori successes in Memory Care to the other areas within Living Branches.

"We wanted to start small and so are hosting several pilots with the residents in Memory Care who could most benefit from this new approach," said Kathleen. "Culture change takes time and must be embraced individually by each person if we want lasting results. Realistically we're looking at the next five years to see a full integration of the Montessori philosophy in all aspects of how we operate, but the journey has been exciting every step of the way."

And the special moments keep growing! (We encourage you to read a selection of stories in our staff members' words in the sidebar.)

"One of my favorite success stories revolves around a resident who was having an extremely tough time communicating with our staff, which presented challenges in completing his daily life activities," said Kathleen. "A

staff member discovered that golf had been one of his life-long passions and put this knowledge to good use. The moment his caregiver started talking to him about golf, his whole demeanor changed – because now, we're talking his language."

"It's a wonderful thing when you hit the right buttons and you see sparkle light up the resident's eyes – and you know this new approach is working," added Kathleen, with an obvious sparkle in her own eyes at the possibilities that lie ahead. "Every time I walk through Park View, Souderton Mennonite Homes Health Care, or Country Cottage, I see evidence of the difference this program is making for our residents and staff. I see residents exploring their interests in an independent way – and staff members being creative in encouraging this independence. I see all five senses engaged in a variety of ways, and I see a beautiful sense of togetherness and partnership in this process. Ultimately, I see Montessori at work, benefiting our entire community – and I can't wait to see where this journey takes us in the coming years."

APART BUT NOT ALONE

Living Branches
Comes **TOGETHER**
During COVID-19

IN MARCH OUR LIVES WERE TURNED UPSIDE DOWN

as the COVID-19 pandemic became a real threat in America. From the cancellation of activities, to closing our campuses to all volunteers and visitors, to screening staff at the start of each shift, we quickly had to adjust to a new normal. We are grateful to our residents and staff who were patient and flexible as new guidelines were issued and new procedures were put in place. We are even more grateful that while we've needed to practice social distancing, staff and residents found new and creative ways to keep the community alive and well during this time. While we may physically be apart, we are certainly not alone. Some of the changes include hallway exercise and bingo, campus-wide sing-a-longs each Friday at Souderton Mennonite Homes, more walks around campus and porch visits with neighbors, and connecting residents with their family and friends via Skype. It is a blessing to know that our community continues to live and grow **TOGETHER**, even in the midst of uncertain and challenging times.





ACTIVE AGING WEEK (1)

Active Aging Week is celebrated nationally the first week in October each year. To make it special this past year, Tasia Coblentz, fitness coordinator at Souderton Mennonite Homes, collaborated with Maribeth Benner, Living U coordinator, to provide free class options for all residents to attend that involved some form of wellness during the fall Living U semester. One of the classes featured Marianne Kane, nutrition care manager, and Ryan Burcik, executive chef, who gave a presentation on eating well for older adults. They shared information about the Mediterranean diet and gave a chef's demonstration on simple recipes that could be used within this diet. Residents enjoyed learning and tasting each of the dishes!



CHICKEN BBQ (2)

The 44th annual Chicken BBQ was held on Saturday, August 24, 2019 at Souderton Mennonite Homes. In addition to the silent auction, a presentation from the Franklin Institute, and the Gospel music fest featuring the Ball Brothers, there was also a bake sale, car show, and vendor-crafter market. For the younger crowd, there were games and entertainment, including the Friendly Farm Petting Zoo, a nine-hole mini-golf course, and an inflatable axe throwing game. This truly was a fun-filled day for the whole family.





FRIENDS DINNER

The 33rd Annual Friends of the Sharing Fund Dinner was held on Wednesday, October 23, 2019 at Dock Woods. Everyone in attendance enjoyed a memorable meal and then were entertained with a concert by Anthony Brown, baritone singer. All proceeds from this event benefitted the Sharing Fund of Dock Woods and The Willows, which provides grants to residents who are no longer able to cover the full cost of their care.



Annual Report

Letter from Chair / CEO



Dear Partners in Mission:

Thank you for continued support of Living Branches. As stated in our mission, we strive to empower older adults and families to lead lives of purpose and joy. It is through partnerships with local businesses, persons in the community, family members, volunteers, residents, and staff that we are able to do just that.

We are very pleased to report that the communities of Living Branches are alive and well. Our financial results for fiscal year ending June 30, 2019 were positive. The occupancy for Living Branches remains above national averages in Residential Living and we have a very strong waitlist. We experienced some challenges with occupancy in Health Care and Personal Care as in years past, but have found this to be an industry-wide trend and are working to position ourselves for the future.

We underwent major internal renovation projects at all three communities in 2019. At Souderton Mennonite Homes, renovations on the 3000 level, including the dining room and common areas, were completed earlier this year. At The Willows of Living Branches, studio apartments in the South Wing were combined to create one bedroom apartments. And at Dock Woods the common space renovation project continued through the building. We recognize the importance of staying competitive in the market and have heavily invested in our communities to be sure they are attractive for future residents.

Over the last fiscal year, the board of directors and executive leadership team have continued with master planning.

The top priority is private rooms in Memory Care at Souderton Mennonite Homes, as well as in Health Care at Dock Woods and Souderton. The early phases of construction will also include new Residential Living residences.

Additionally, we have worked to increase the standard of service that we provide to our residents through two major initiatives. First, the implementation of the Living Branches philosophy of care, which incorporates Montessori principles for senior living to provide life-enriching experiences for all residents by tailoring our care practices to an individual's interests and abilities. Second, we are deepening our commitment to excellent care by taking customer service to the highest levels throughout our communities. This customer service training for staff is called the Living Branches Experience. These two programs work in tandem to define and strengthen the Living Branches culture.

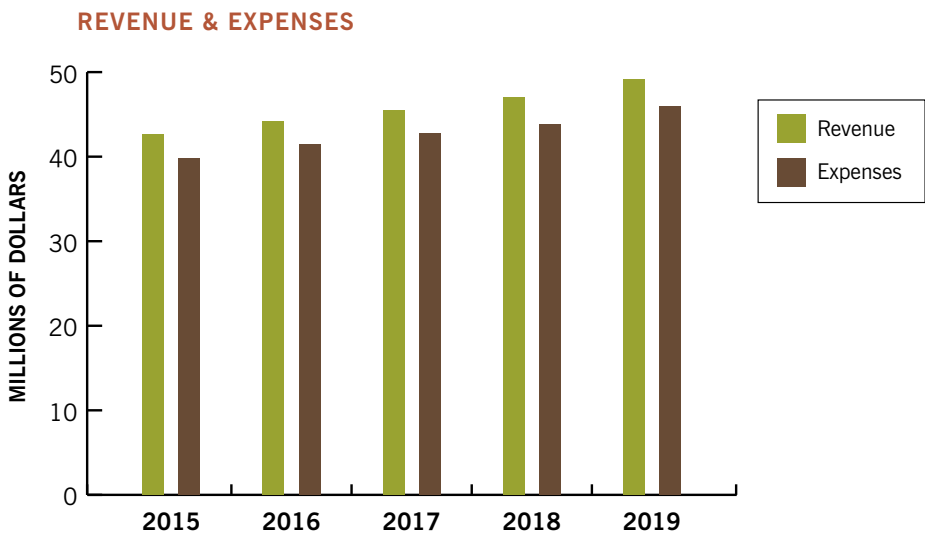
Living Branches is blessed with wonderful residents, hardworking staff, strong leadership, and many committed partners who join us in our mission. On behalf of our residents, staff, and board of directors, we thank you for your support as we continue to live with purpose and joy.

Edward D. Brubaker

EDWARD D. BRUBAKER
President/CEO

Kenneth J. Clemmer

KENNETH J. CLEMMER
Board Chair

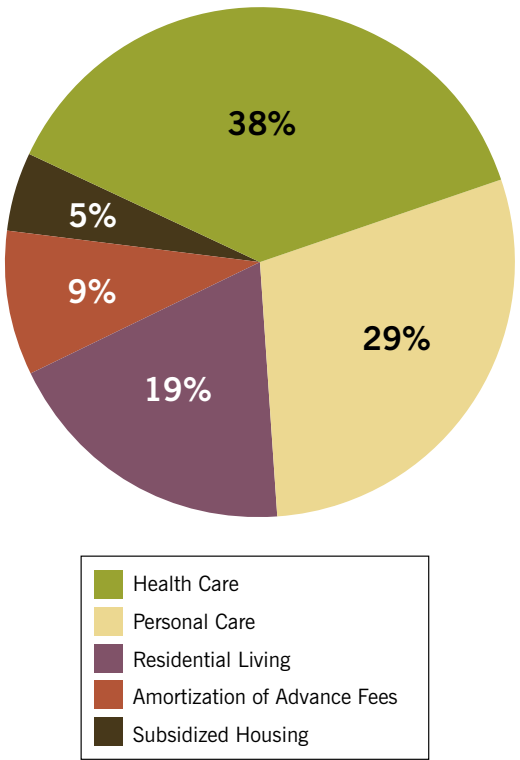


LIVING BRANCHES CONSOLIDATED BALANCE SHEET
JUNE 30, 2019

ASSETS	
Current Assets	\$10,414,495
Assets Whose Use is Limited	111,508,360
Property & Equipment (Net)	71,358,500
Other Assets	504,561
TOTAL	\$193,785,916

LIABILITIES & NET ASSETS	
Current Liabilities	\$6,120,039
Long-Term Debt	9,311,244
Refundable Fees & Deposits	24,099,623
Deferred Revenues from Entrance Fees	23,964,687
Other Liabilities	75,566
Total Liabilities	\$56,135,269
Net Assets	\$130,214,757
TOTAL	\$193,785,916

2019 RESIDENT SERVICES
REVENUE SOURCES



BENEVOLENT &
UNREIMBURSED CARE

Health Care	\$1,843,910
Personal Care & Residential Living	1,531,749
TOTAL	\$3,127,695
NUMBER OF RECIPIENTS	
Health Care	62
Personal Care	41
TOTAL	103

Benevolent and unreimbursed care is provided to residents when their savings, income, insurance, and public assistance benefits are not sufficient to fully pay for the cost of care provided by the organization.

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275 Dock Drive • Lansdale, PA 19446
ADDRESS SERVICE REQUESTED

**The Willows
of Living Branches**
2343 Bethlehem Pike
Hatfield, PA 19440
215-822-0688

**Souderton
Mennonite Homes**
207 W. Summit Street
Souderton, PA 18964
215-723-9881

Dock Woods
275 Dock Drive
Lansdale, PA 19446
215-368-4438

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THANK YOU!

We would like to extend our thanks to the Living Branches community for their support and encouragement during the coronavirus outbreak. We are grateful for our dedicated team members who are working hard to care for residents while keeping them safe and keeping spirits high. We also thank residents and their families for being so understanding and supportive of the changes that have taken place. In the midst of these challenges, we are still experiencing moments of joy each day at Living Branches. We are grateful to be living and growing together with all of you.

For more information about the Living Branches response to COVID-19, visit livingbranches.org.

