

BRANCHING OUT

LIVING BRANCHES

Live & Grow – Together

MEMORY CARE NEIGHBORHOODS

OPEN

at Souderton Mennonite Homes



INSIDE THIS ISSUE: THE NEW NAME FOR MEMORY CARE AT LIVING BRANCHES



FROM THE PRESIDENT'S DESK

STARTING THE NEXT CHAPTER OF MEMORY CARE

AS WE APPROACH the completion of two new Memory Care neighborhoods at Souderton Mennonite Homes — one for Personal Care and the other for Health Care — I couldn't be more excited to welcome our team members, residents, their families, and the wider community into these beautiful new spaces. If you've spent time in our previous Memory Care neighborhood for Personal Care, you'll be amazed by the transformation.

Words and pictures can hardly do justice to the impact of these new neighborhoods. But when you talk with our residents, meet with our team members, or tour the new spaces, you'll get a sense of how deeply Living Branches is committed to Memory Care. From offering enriching experiences to providing specialized training that equips our team to deliver exceptional care, we are dedicated to helping those living with dementia lead meaningful, fulfilling lives.

It's equally important to share this commitment with the broader public. That's why I'm thrilled to introduce Serenata Memory Care: the new name for Memory Care across all Living Branches campuses.

After months of thoughtful research, numerous focus groups, and valuable input from residents and team members, Serenata was chosen to reflect what makes Memory Care at Living Branches unique. The name conveys two key ideas: a sense of calm and peace, symbolizing the warm community you'll find in our Memory Care neighborhoods. The other element is the joy that music brings to so many of our residents, especially through creative arts therapy and the Music & Memory program.

When you hear Serenata, I hope it reminds you of the joy, purpose, and connection that fill our Memory Care communities, especially in these new neighborhoods at Souderton Mennonite Homes. Thank you for your continued support as we continue to develop Serenata into a vibrant Memory Care program that serves our residents, families, and community with care and compassion.

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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Living Branches maintains a mailing list of people who we feel are interested in the activities, events, programs, and services of our communities. If for any reason you want your name removed from this list, please email the editor with your name, address, and request at BranchingOut@LivingBranches.org

Living Branches is a member of:



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The Serenata name represents Living Branches' four Memory Care communities and our person-centered philosophy, unique therapies, enhanced staffing ratio, and exceptional care for residents with dementia.

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A Warm Welcome HOME

Unveiling the New Memory Care Neighborhoods at Souderton Mennonite Homes

CAMERAS FLASHED AND APPLAUSE filled the room as scissors sliced the white ribbon held by elected officials, Living Branches leadership, and a Health Care resident at Souderton Mennonite Homes.

Hundreds had gathered on an early November afternoon for the ribbon cutting at the official open house of Souderton Mennonite Homes' new Serenata Memory Care neighborhoods. (See page 8 for more details about Serenata, the new name for Memory Care at Living Branches.)

In the quiet pause while photos were taken, one resident surveyed the sizable crowd and remarked to a neighbor, "Even with all these people, it's not cramped in here. It feels just right."



FROM HOSPITAL TO HOME

“Just right” meant different things to the hundreds of residents, team members, and community guests who toured the Serenata Personal Care and Health Care neighborhoods, nearly ready to welcome residents after a year and a half of construction.

For some, the size is “just right.” The Health Care neighborhood will house 18 residents, and Personal Care will accommodate 26 residents living with dementia. All will enjoy private rooms and en-suite European style bathrooms.

The neighborhoods also feature spacious activity areas, lounges, kitchens, and workspaces. (“You could play floor hockey in here!” a team member joked to a colleague.)

For others, “just right” described the late afternoon sunlight streaming through the large windows, casting the spaces in a warm glow. Guests noted the tasteful colors, artwork, furniture, lighting, and other elements that make the neighborhoods feel welcoming and homelike.

“I almost cried,” says Natalie Reich, life enrichment coordinator for the Serenata Health Care community. “When I walked from the existing Health Care space into the new one, it was like going from a hospital to home.”

Jill Arroyo, Souderton Mennonite Homes’ director of Health Care services, feels the new neighborhoods are a cut above — and a much-needed addition to campus life.

“I’ve worked in three other places with specialized Memory Care areas within long-term care, and this is by far the most impressive,” she says. “Health Care residents deserve this beautiful space.”

Jen Derstine, director of Personal Care services at the Souderton campus, echoes the excitement felt by Souderton Mennonite Homes family and team members.

“At the open house I spoke with family members of current Personal Care residents who are considering Memory Care. They can definitely see their parents thriving in the new space,” Derstine says. “The new neighborhood has better natural lighting, two courtyards, and an updated look compared to the existing Personal Care neighborhood for residents with dementia.”

Souderton Mennonite Homes team members will also benefit from the thoughtful design of the new spaces. “My team is excited,” Derstine says. “We’ll have a break room, a salon where residents can have their hair done without going all the way downstairs, and more private areas for residents to visit with family or enjoy small group activities. For months I’ve been looking at blueprints and diagrams, so to see it come together is amazing.”

THE WORK CONTINUES

Souderton Mennonite Homes expects to welcome Personal Care and Health Care residents with dementia into their new

neighborhoods before the new year. Most rooms in the Serenata Health Care and Personal Care neighborhoods will go to current residents.

“In the process of determining which Health Care residents will move to the new neighborhood, we received positive feedback from families,” Arroyo says. “It can be difficult to provide individualized attention when you have a mixture of residents with different cognitive abilities and goals. Having similar people living together leads to better outcomes.”

For Living Branches leadership, November’s ribbon cutting marked both an end and a beginning.

“A year and a half ago we broke ground on these two new neighborhoods,” says Edward D. Brubaker, president/CEO of Living Branches. “We are so appreciative of the community’s support and encouragement as we conclude this stage of work and move to the next.”

As residents settle into the new Memory Care neighborhoods, Souderton Mennonite Homes will continue renovation work on its existing Health Care center, which began in the fall. Renovations are expected to take about 18 months.

“Across all three of our campuses, this is the final Health Care neighborhood in need of renovations,” Brubaker says. “The goal is to bring its appearance, accessibility, and comfort in line with our other Health Care neighborhoods. Once completed, we will have gone from one private room in Health Care at Souderton Mennonite Homes to 49.”

CELEBRATING A TEAM EFFORT

With a bright future in store for the Serenata Personal Care and Health Care neighborhoods, the open house was the perfect time to acknowledge the hard work and community support that made them possible.

Construction work was funded in part by Rooted in Love, Growing Together: The Campaign for Living Branches, which received over \$4.3 million in community contributions.

An additional \$2 million was secured through Pennsylvania’s Redevelopment Assistance Capital Program, with support from Senator Maria Collett and Representative Steve Malagari. Both attended the open house to celebrate with Living Branches.

Brubaker and Living Branches board president John Duerksen also thanked Living Branches team members and external partners — including Benchmark Construction, RLPS Architects, Eventus Strategic Partners, Reese Hackman Engineering, and Irick Eberhardt & Mientus — for their success in planning, designing, and constructing the new neighborhoods.

“Opening our enhanced Memory Care communities, including a new Health Care space for this campus, is a momentous occasion for Living Branches,” Brubaker says. “The impact will be felt by residents, families, team members, and the surrounding community for years to come.”



During the open house, one Residential Living resident commented on the thoughtful design of the new neighborhoods. Dementia support isn’t something she thinks about daily, but knowing that such a space is available makes her future at Souderton Mennonite Homes feel brighter.

“It’s comforting,” she said, looking around at the bustling room of community members enjoying the new space, “just knowing there’s a place this nice if I ever need it.”



INTRODUCING *Serenata:* The New Name for Memory Care at Living Branches

MEMORY CARE AT LIVING BRANCHES IS NOW SERENATA MEMORY CARE.

Under this new name are the four Memory Care communities (two at Souderton Mennonite Homes and two at Dock Woods) and the person-centered philosophy, unique therapies, enhanced staffing ratio, comprehensive training, and excellent care that define the Living Branches model.

“When you hear the name Serenata, we hope it evokes the peace and purpose that abound in our Memory Care communities,” says Living Branches president/CEO Edward Brubaker. “The new name is one way we’re demonstrating Living Branches’ commitment to offering the best Memory Care in southeastern Pennsylvania.”

In the coming weeks the Serenata brand name will be introduced across Living Branches’ campuses and marketing

materials, including signs, the website, and more. The four neighborhoods will be known by the name Serenata followed by their level of care: Personal Care or Health Care.

“It was important to choose a name that looks and sounds like Living Branches,” explains Alexandra Metricarti, chief marketing and public relations officer for Living Branches. “For those already familiar with our Memory Care neighborhoods, we wanted to find a word that feels like a ‘good fit.’ For those unfamiliar with us, we wanted to set the right tone.”

WHAT’S IN A NAME? THE PATH TO SERENATA

To arrive at one word – Serenata – Living Branches’ marketing team started with hundreds and hundreds. In early 2024 Living Branches tapped Varsity, the marketing firm that helped coin the name Living Branches, to guide the Memory Care branding process.

Varsity invited over a dozen Living Branches team members from Personal Care, Memory Care, Health Care, life enrichment, sales, and leadership to participate in a “name-storming” session. After hours of collaboration, the walls were covered with hundreds of words and phrases illustrating Memory Care at Living Branches.

Some words, like “blossom” and “bloom,” described the experience of many residents who move to Memory Care. Others noted how the communities radiate “peace” and “calm” or the “joyful” and “musical” creative arts therapy programs used in Memory Care. Still others ventured into the natural world, choosing words related to trees, flowers, water, and celestial objects.

With all these words in mind, Varsity presented a short list of potential brand names to Living Branches. Focus groups of team members and residents familiar with Memory Care whittled the list to a few potential options, including Astra, Radia, Bloom, and Reflections.

But Serenata wasn’t quite there yet.

“Ultimately we kept digging for a word that did two things,” says Metricarti. “We wanted to get at the feeling of calm in Memory Care and nod to our creative arts therapy and Music & Memory programs, which are unique to Living Branches.”

Enter: Serenata. The word hints at “serene” and a musical “serenade” but is a wholly unique word intended to help Living Branches stand apart.

“We knew pretty quickly we had something great,” Metricarti says. “Serenata speaks to our popular music

programs, which are a key component of creative arts therapy. And it sounds as peaceful as walking into one of our Memory Care neighborhoods.”

Using the chosen name, Varsity offered several logo options that balance liveliness and joy with peace and calm. Living Branches chose a logo (above) that evokes gentle movement. Some viewers see birds or feathers, while others described gentle ripples on a pond.

“Paired with the name Serenata Memory Care, the logo symbolizes grace, fluidity, and an uplifting environment,” Metricarti adds. “The gold color reminds me of the warmth we cultivate at Living Branches.”

THE FUTURE OF SERENATA

Over time the Serenata name will become second nature to Living Branches residents, team members, and the wider community.

“It’s a wonderful end for the branding project, but Serenata is really another beginning,” Brubaker says. “Serenata encapsulates how we hire and train exceptional caregivers, our person-centered approach to resident engagement, and the four beautiful neighborhoods – three of which opened in the last two years – in which residents find purpose and joy.”

Living Branches leadership, marketing, and team members providing day-to-day resident care and life enrichment aim to continue developing Serenata programs and offerings. As residents settle into their new communities, the sky’s the limit for life enrichment coordinators tasked with helping residents find purpose and joy.



FOR RESIDENT ENGAGEMENT DIRECTOR ANNETTE ECHANIS, THE FUTURE OF SERENATA MEMORY CARE IS A BRIGHT ONE. HER LIST OF INITIATIVES FOR THE COMING YEAR INCLUDES:

- Increasing the amount of intergenerational programming
- Organizing more community outings for Serenata Personal Care residents, such as dress rehearsals for local school plays or meals at local restaurants
- Building “destinations” within Serenata neighborhoods, including mini coffee shops, gift shops, and other sites with specific purposes
- Focusing more on residents’ individual abilities and interests rather than defaulting to what’s expected at their level of care
- Achieving Dementia Capable Care certification for all four Serenata neighborhoods

“We really want to offer residents opportunities to participate in activities that suit their interests and abilities,” Echanis says. “We want to see residents engaging in activities that are ideal for them – whether that means visiting a neighborhood outside Serenata or heading out into the community beyond Living Branches.”

A 'Three-Peat!'

Dock Woods Health Care Achieves Third Deficiency-Free Annual Survey

ON A HUMID MORNING in late August, the Health Care neighborhoods at Dock Woods had one of their busiest days in recent memory.

After months of renovations, refurbished resident rooms in the Ivy Lane neighborhood were ready for residents. First thing in the morning, movers and Living Branches team members hustled through the halls, getting ready to move beds, furniture, and personal items into residents' new accommodations.

And then the state inspectors walked in.

"The Pennsylvania Department of Health conducts an unannounced annual survey each year," explains Naomi Hawkins, director of Health Care Services at Dock Woods. "They had just inspected to approve Ivy Lane for occupancy the week before, so when I got the call from the front desk I thought, 'This has to be a joke, right?' But it wasn't!"

During an annual inspection, surveyors assess resident care, staffing levels, cleanliness, food preparation areas, compliance with state and federal regulations, and more. Most facilities are asked to improve at least a few areas, such as processes for care documentation, medication administration, or infection control.

Dock Woods' Health Care centers have historically done well in these inspections. The community earned a deficiency-free survey in both 2022 and 2023 — quite an achievement for any organization.

But would it happen again?

"Everything we do depends on people — both residents and team members — and sometimes things aren't perfect," Hawkins shares. "As soon as inspectors walk into the building, the lead person meets with leadership while other surveyors immediately visit the kitchens and resident spaces. Anything can happen."

An inspection takes several days, so Hawkins didn't know how Dock Terrace had done until three days later when it was time to review the preliminary

results. At the start of her meeting with the surveyors, Hawkins grabbed a notebook to write down their findings so she could get to work on a plan of correction.

But for the third year in a row, she didn't need that notebook.

"Deficiency-free surveys are difficult to achieve in the state of Pennsylvania," says Lisa Reiff, executive director of Dock Woods. "Doing it three times in a row is rare — especially post-pandemic and during construction. Communities like Living Branches that care for residents with complex health needs face additional challenges. And evolving standards and regulations, such as staffing mandates, make it harder still."

Hawkins is proud of this year's deficiency-free survey and acknowledges

"Deficiency-free surveys are difficult to achieve in the state of Pennsylvania"

it's about having the right mindset, day in and day out.

"When you do the right thing every day, you don't have to change what you're doing when people are watching," she says. "Our campus team members adopt that approach, from nurses and aides to the dining and environmental services teams. It takes everyone coming together to make Dock Terrace a great place."



Living Branches campuses are intergenerational communities! Children and young adults bring energy and expertise to our campuses, benefiting residents and team members alike.



THE OLYMPICS COME TO LIVING BRANCHES

Competitors in the 2024 Olympics weren't only in Paris – they could also be found at Living Branches! Residents at all three campuses took part in special Olympics-themed competitions, including pool noodle javelin, balloon volleyball, and a regional favorite, apple-peeling.



STUDENTS IN SERVICE

Souderton Mennonite Homes residents enjoyed engaging time with local high school students. Dock Mennonite Academy senior Yebeen Lee joined Serenata Personal Care residents and creative arts therapy coordinator Seth Laucks for a morning of music, playing several instruments as residents played and sang along. Residents also worked with Souderton Area high school students in Genius Bar programs, allowing them to receive tech support from the comfort of campus.



THE FUTURE OF SENIOR LIVING

Two Living Branches team members earned professional development scholarships from LeadingAge, an organization of aging services providers like Living Branches. These scholarships are awarded to those pursuing further education, training, or certifications. Thy Tran (front, left) graduated from Living Branches' CNA class and now works in Personal Care at Souderton Mennonite Homes while attending nursing school. Shelby Jo Schroy (front, right) another graduate from Living Branches' CNA class, spent several years in the Health Care neighborhood at Dock Woods before earning her LPN.

CAPTION: FROM LEFT TO RIGHT: SAMANTHA WHITE, DIRECTOR OF TALENT AND CULTURE; JEN DERSTINE, DIRECTOR OF PERSONAL CARE SERVICES AT SOUDERTON MENNONITE HOME; THY TRAN, CNA AT SOUDERTON MENNONITE HOMES; NICHOLAS ROSATO, ASSISTANT DIRECTOR OF HEALTH CARE SERVICES AT DOCK WOODS; SHELBY JO SCHROY, LPN AT DOCK WOODS; ERIN MCDERMOTT, DIRECTOR OF MEMBER ENGAGEMENT AND WORKFORCE SOLUTIONS FOR LEADINGAGE PA, EDWARD BRUBAKER, PRESIDENT/CEO.



FROM LEFT TO RIGHT: KEVIN BERGEY, MARK BERGEY, HENRY BERGEY, ADAM MOYER, AND LUKE BERGEY.

CELEBRATING OUR FRIENDS AT BERGEY'S

Bergey's Inc. celebrated their 100th anniversary with a jam-packed day of fun for the whole community. As one of our close partners, Living Branches residents and team members were in attendance, including Apple Orchard Café server/CNA Emma Schnable, pictured above with Henry Bergey. Living Branches continues to benefit from the expertise of Bergey's team members, such as Luke Bergey, who serves on the Living Branches board of directors.



REJOICING IN THE BENEVOLENT CARE MINISTRY

In late October Dock Woods hosted its 36th annual dinner for Living Branches donors. Guests enjoyed delicious food and fellowship while celebrating the impact of community support on Living Branches' benevolent care program. This ministry provides grants and unreimbursed care to about 100 residents each year who can no longer cover the full cost of their care despite prudent financial stewardship.



A FUN DAY AT THE FAIR

All three Living Branches campuses held a joint Country Fair day in early September, complete with petting zoos, pie-tasting, line-dancing, antique tractors, cornhole games, and more. Residents and team members got into the spirit with festive outfits and plenty of smiles.



Family Reunion:

RESIDENT AND GREAT-GRANDDAUGHTER CALL THE WILLOWS HOME

LIVING BRANCHES RESIDENTS are referred to our communities many ways: friends and family, advertisements, a Google search. But only one resident has ever decided to join us after learning their great-granddaughter is a resident.

After applying to move into The Willows of Living Branches, JoAnn McDermott was talking her great-granddaughter, Molly, who was just about to start her senior year as an equine science major at Delaware Valley University. Molly had just been accepted as the student in residence at The Willows – a fact that JoAnn didn't know when she toured the campus.

"It was completely by coincidence," Molly says. "I mentioned the position to my great-grandparents who had come over for the Fourth of July. I didn't know when I applied that my great-grandmother was looking to move out of her house!"

"My family likes to joke that now they can visit us both at the same place," Molly adds. "It's been nice for [JoAnn] to have a family member here."

As the student in residence at The Willows, Molly's role is to bring intergenerational fun and fellowship to campus. Every day she dines with residents for at least one meal, and she spends time doing activities and programs with them each week.



But for Molly, the unplanned moments of joy and connection are the best part.

"It's really nice getting back from school and saying hello to everyone," she explains. "I love the little catch-ups and how easy everyone is to talk to. It's that community feeling of knowing that everyone cares."

Molly's presence has been a blessing, too, for The Willows residents — and not just the one she's related to. As a student of equine science, Molly loves to connect with residents who owned horses and other farm animals.

"Because my program is so hands-on, I always have interesting things to share with them," she says.

"Yesterday I spent the whole day doing blood draws with horses, and the residents loved hearing about that. They love telling me about their animals, too. I'm coming at it as a future professional, so their stories give me a more rounded perspective."

As Molly waits to hear back from the veterinary schools to which she has applied, she looks forward to what her future career will hold. Even after she leaves in May 2025, Willows will always be a second home that will welcome her back anytime she wants to visit.

"This is such a great program," Molly says. "I have everyone here to support me, which is amazing, and I get to give back to them as well. It's like a family here. Honestly, if I could stay forever, I would."

Annual Report Letter from Chair / CEO



Dear Partners in Mission:

We are grateful for your continued support of Living Branches as we come together to empower older adults and families to lead lives of purpose and joy. Your partnership with us allows us to advance that mission every day.

The last fiscal year ending June 30, 2024, was a positive year in which we exceeded our budgeted goals. While the Covid pandemic and occupancy challenges continue to impact census and cash flow, our underlying financial strength remains positive. This strength enables us to continue renovation projects that will prepare Living Branches for the coming years.

This fall we anticipate completing our construction at Souderton Mennonite Homes and welcoming residents to more modern, spacious, and thoughtfully designed accommodations in Health Care and Memory Care. We appreciate the efforts by our board, financial services, and operational teams, and we're grateful to every donor who supported the capital campaign that funded this construction.

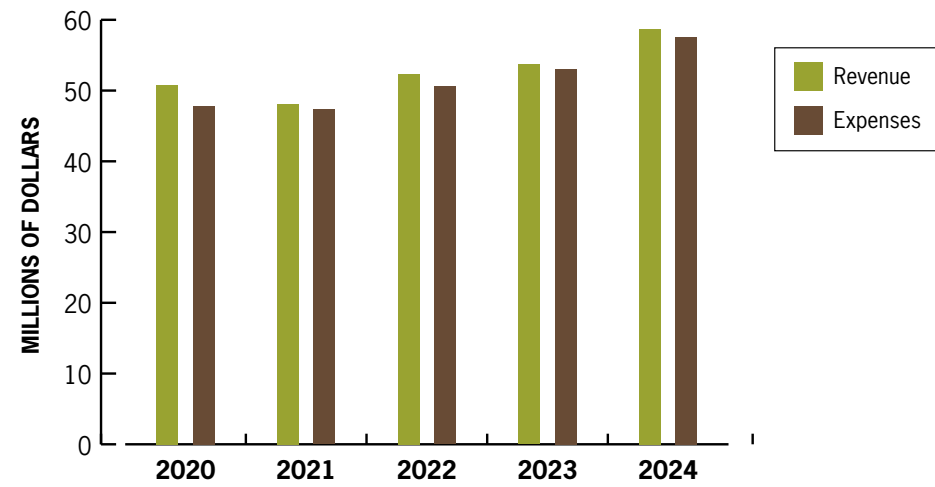
As urgency surrounding the pandemic fades, we will be guided by our strategic plan in turning our attention to team member culture, community life, and research. We are excited to see the results of ongoing work in all of these areas, including new team member recruitment and retention initiatives; a web-based portal to enhance resident connection and communication; and efforts to streamline how data is collected across all three Living Branches campuses.

We look forward to another fruitful year of uniting with you to empower older adults and families to lead lives of service and joy. On behalf of our residents, team members, and the board of directors, thank you for being a valued member of the Living Branches community.

EDWARD D. BRUBAKER
President/CEO

JOHN W. DUERSEN
Chair of the Board of Directors

REVENUE AND EXPENSES



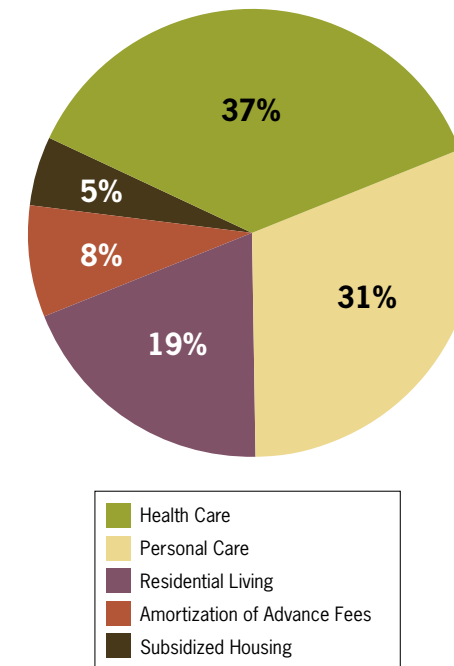
LIVING BRANCHES CONSOLIDATED BALANCE SHEET
JUNE 30, 2024 AND 2023

ASSETS	2024	2023
Current Assets	\$9,586,062	\$9,854,170
Assets Whose Use is Limited	147,990,921	141,132,716
Property and Equipment (Net)	103,748,931	84,260,255
Other Assets	1,158,077	690,599
TOTAL	\$262,483,991	\$235,937,740

LIABILITIES & NET ASSETS	2024	2023
Current Liabilities	\$11,616,607	\$7,768,805
Long-Term Debt	21,137,970	14,474,276
Refundable Fees and Deposits	26,900,661	25,254,631
Deferred Revenues from Entrance Fees	26,213,602	24,443,902
Other Liabilities	9,084,799	10,210,888
Net Assets	\$167,530,352	\$153,785,238
TOTAL	\$262,483,991	\$235,937,740



2024 RESIDENT SERVICES REVENUE SOURCES



BENEVOLENT AND UNREIMBURSED CARE

	2024	2023
Health Care	\$3,673,243	\$3,592,924
Personal Care and Residential Living	1,645,728	1,686,906
TOTAL	\$5,318,971	\$5,279,803

NUMBER OF RECIPIENTS	2024	2023
Health Care	65	66
Personal Care	36	38
Residential Living	0	0
TOTAL	101	104

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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LEAVE US A GOOGLE REVIEW!

WANT TO SHARE WHAT MAKES YOUR LIVING BRANCHES COMMUNITY SPECIAL? Your positive Google review can motivate future residents and team members to join The Willows of Living Branches, Souderton Mennonite Homes, or Dock Woods.

To submit a Google review for your community, you must have a Google/Gmail account. After signing in on a desktop computer or a mobile device, follow these steps to leave a Google review:

- 1** Do a Google search for your community: The Willows of Living Branches, Souderton Mennonite Homes, or Dock Woods.
- 2** When the search results appear, look for the community's profile. On a desktop computer, the profile appears on the right side of the Google search results page. On a mobile device, the profile appears at the top of the Google search results page.
- 3** On a desktop, scroll down the page and click the "Write a review" button. On a mobile device, tap the "Reviews" button.
- 4** Leave a five-star rating and your comments about the campus, residents, activities, team members, or anything else you'd like the world to know.

**THANK YOU FOR SUPPORTING
THE LIVING BRANCHES COMMUNITY!**