



*To assure access to quality health and wellness care to the residents and workforce
of the Greater Williamsburg Community*

**Board of Directors Meeting
August 12, 2026 | 5:00 PM**

- 1) Call to Order and Attendance | Dr. Rebecca Bruhl, Board Chair
- 2) Action Item: Consent Agenda | Dr. Rebecca Bruhl, Board Chair
 - a) Board Meeting Minutes | July 15, 2026
 - b) Executive Committee Minutes | July 22, 2026
 - c) Finance Committee Minutes | July 22, 2026
- 3) Facility Update | Mr. Aaron Thompson, Executive Director
 - a) Clinical Update | Kendra Robinson, NP
 - b) Business Office | Jacob Cooper
 - c) Operations | Maggie Beamon
 - d) Dental | Dr. Modeste
 - e) Communication & Development | Susan Dunn
 - f) Grants & Development | Sara Lewis
- 4) Committee Reports
 - a) Finance Committee | Melissa Tucker, CPA, Chair
 - b) Governance & Nominating | Dr. Aday, Chair
 - c) Planning & Performance | Scott Herr, Chair
- 5) New Business
 - a) Building Discussion
 - i) OTMDC - 2030
- 6) Next Board Meeting | September 9, 2026
- 7) Adjourn

Board of Directors Meeting

July 15, 2026 | 5:00PM

Members Present	Members Absent	Staff Members Present
Becca Bruhl, DrPH, MPH, MEM David Aday, PhD R. Scott Herr William Hill, MD, MPH Ted LaRose Loren Smith, MPH Karen Stokes, MSN-RN Randy Walton, PHD Doug Holroyd Barbara Null Ayanna Williams	Cris Becerra Ron Kirkland Robin Nelhuebel, PhD, MSN, RN, RT(R) Henry Ranger, PharmD Melissa Tucker, CPA	Aaron Thompson Kendra Robinson, NP Lorenzo Modeste, DDS Maggie Beamon Sara Lewis Susan Dunn

I. Call to Order & Attendance | Dr. Rebecca Bruhl, Board Chair

II. Consent Agenda | Dr. Rebecca Bruhl, Board Chair

Approval of Minutes

- Board of Directors Minutes | June 22, 2026
 - i. A motion to approve the minutes was made, with the addition below, by Doug Holroyd and seconded by Loren Smith and was approved by the board.
 1. Reflect communication to Newport News regarding funding completed by August 2026,

III. Facility Reports | Mr. Aaron Thompson, Executive Director

Facility Update | Mr. Aaron Thompson, Executive Director

- Updated board on budget revenue surplus.
- Discussed the NAP (Neighborhood Assistance Program) and how it is utilized.
- Announced that annual reviews will begin within the next month. The board will receive Mr. Thompsons self-evaluation by August 15, 2026.
- The audit is progressing, and an LOI was signed for the 990.
- JCC surveyed the building. Mr. Thompson confirmed with Mr. Reinheimer that we continue to have strong interest in purchasing the building and would be conducting an independent survey as well.

IV. Committee Reports

No additions to the information in the board packet.

V. New Business

New Board Member Orientation | Dr. Rebecca Bruhl, Chair

- Introductions of new board members
- The history and overview of OTMDC was completed.
- Reviewed the role of the Board.
- Discussed the different committees and their responsibilities.
- Completed an overview of the FY'26 and current fiscal budget.
- Updates on our future outlook.
 - Purchasing of building its objectives required to complete.
 - Discussions on our needs and how the extra space may be utilized.
 - Reviewed behavioral health challenges.
 - Explained how JCC is our fiscal agent.
 - Explained our commitment to be awarded FQHC status or Look-Alike status as well as requirements needed to receive this status.

VI. Next Meeting

August 12, 2026 at 5:00pm

VII. Adjournment

Motion to Adjourn

- A motion to adjourn was made by Doug Holroyd and seconded by David Aday and the board approved, meeting adjourned.

Executive Committee

July 22, 2026 | 5:00 PM

I. Call to Order & Attendance

Members Present	Members Absent	Staff Members Present
Dr. Becca Bruhl, Chair Dr. David Aday, Vice Chair Scott Herr Melissa Tucker, CPA		Aaron Thompson Susan Dunn

II. Minutes

Approval of Minutes | May 13, 2026

- Minutes were approved in the June Board of Directors meeting.

III. Discussions | Decisions | Action Items

Updates

- Executive director updates
 - The audit is progressing.
 - The WHF final grant submission will most likely be postponed due to technical i
 - Staff appraisals will be disseminated this Friday, employees will have 10 days to submit their response, then supervisors will meet with staff to discuss and evaluate. This is to be completed by 9/10/26.
 - There are 2 new hires: Edward Vestergaard, Assistant Business Manager; and Annabelle Diaz, Marketing & Communications.
 - The Impact Report is anticipated to be mailed out in August.
 - The Executive Director will submit his self-appraisal 8/14/26. The tentative date for Board discussion will be 9/9/26 at a closed session.
 - Follow My Health has been expedited to get it online as soon as possible.
- General committee updates (including ad hoc committee)
 - G&N
 - The board member metrics are just shy of FQHC Look-Alike compliance.
 - P&P
 - August meeting may be canceled.

Discussion

- Committee work plans (for FY27)
 - Planning & Performance
 - Review of organization performance targets.

- Look into FQHC items that the committee should work on.
- Governance & Nominating
 - Get the PAC up and meeting with regularity.
 - To get the board in compliance with FQHC requirements (with respect to demographic representation).
 - Contact the non-jurisdictional members to discuss committee assignments and succession planning.
 - Review and compile the annual Board self-assessment tool.
 - Plan for clinic leadership, Directors, and Board Executive succession plans.
 - Look into implementing board training activities.
- Communication & Development
 - Dr. Bruhl would be willing to temporarily serve on the committee to help with a transition.
- Finance
 - Work with auditors to complete audits and Period 13
 - Look for a possible candidate for Succession planning
- JCC (building, LAL planning, fiscal agency)
 - Mr. Thompson spoke with Mr. Rinehimer and reiterated our interest in purchasing the building.
 - Reached out to former Board member, Ray Rodriguez, about HRSA and utilizing his expertise.
 - Timeline for LAL status
 - Within 6 months, we could be in compliance.
- Assessing changing needs
 - The 2030 Plan: What OTMDC will look like
 - The Clinic and Dental Directors and the Operations Manager started a process of working on what their needs would be for the future.
 - The committee would like to have their plans completed for presentation at the October P&P meeting.
- Executive director annual review - process & timeline
 - The self-evaluation will be submitted to the board by 8/14/26.
 - Goals identified in the evaluation process last year will be included in the self-assessment.

IV. Next Meeting

Meeting Date

- September 23, 2026, at 5:00 pm.

V. Adjournment

Motion to Adjourn

- A motion to adjourn was made by David Aday and seconded by Melissa Tucker and the committee approved.

Finance Committee

July 22, 2026 | 4:30PM

I. Call to Order & Attendance

Members Present	Members Absent	Staff Members Present
Melissa Tucker, Chair Becca Bruhl Scott Herr, Chair Heather Modispaw Ayanna Williams		Aaron Thompson Susan Dunn Jacob Cooper

II. Minutes

Approval of Minutes | May 13, 2026

- Minutes were approved in the June Board of Directors meeting.

III. Discussions | Decisions | Action Items

Executive Updates

- The audit is progressing well.
- The WHF final grant submission will most likely be postponed due to technology issues on their end.
- Staff appraisals will be disseminated this Friday
- There are 2 new hires: Edward Vestergaard, Assistant Business Manager; and Annabelle Diaz, Marketing & Communications.
- The Impact Report is about 90% complete and it is anticipated to be mailed out in August.
- The Executive Director's self-appraisal will be submitted 8/14/26. Tentative date for closed session Board discussion will be 9/9/26.
- Follow My Health has been expedited to get it online as soon as possible.

Review of Internal / committee Financial Reports for 6//30/2026.

- Report still needs period 13 verification for final numbers.
- Self-Pay has increased
 - This is due to bills going out on a regular basis as well as the front office collecting payments.

Reviewed the endowment activity

- Reviewed deposits, withdrawals, and final numbers for FY26

- Discussed endowment trends from the last several years.

Discussion on what the committee should focus on for the next year

- Have the staff and finance committee be solely responsible for compiling reports.
- Would audit costs increase when we become FQHC or Look-Alike.

IV. Next Meeting

Meeting Date

- September 23, 2026 at 4:30pm.

V. Adjournment

Motion to Adjourn

- A motion to adjourn was made by Scott Herr and Seconded by Ayanna Williams and was approved by the committee.

Olde Towne Medical & Dental Center

Community Service Report Dashboard | July 2026 | FY2027 Period 1 | Year-over-Year Analysis

Executive Summary

July 2026 opens FY2027 with a year-over-year volume decline of 797 patients (down 9.2%) and 1,121 visits (down 8.5%) compared to July 2025. While this marks a softer start to the new fiscal year, **context is important: July 2025 was a comparatively strong month against which this period is measured.**

The defining FY2027 financial question — whether Medicaid/MCO enrollment continues to recover — shows measured progress. At 145 patients, July's Medicaid/MCO count is up from the May and June lows of 86 and 104 respectively, suggesting a slow recovery may be underway.

KEY PERFORMANCE INDICATORS — JULY 2026 vs. JULY 2025

Volume & Utilization

Total patients 797	Total visits 1,121	Visits per patient 1.41	Dental visits 340
Medical visits 781	Male patients 395	Female patients 726	36–64 age cohort 639

July 2026 — Detailed Analysis

Patient & Visit Volume

The service line split is a notable story: dental visits surged 14.5% to 340. This reversal mirrors patterns observed earlier in FY2026 and may reflect scheduling cycles, dental provider availability, or patient demand patterns. Month-over-month, the overall volume of 1,121 visits represents a solid recovery from May's 935-visit low and is broadly consistent with the July-through-October seasonal pattern observed in prior years.

Service Line Breakdown

Service line	July 2025	July 2026	Change	% Change
Dental visits	297	340	+43	+14.5%
Medical visits	928	781	-147	-15.8%
Total visits	1,225	1,121	-104	-8.5%

Payer Mix

Medicaid Dental increased to 115 (vs. 104 prior year), a positive signal. Dual Eligible Medicare patients more than doubled (8 to 20).

Insurance category	July 2025	July 2026	Change
Uninsured	679	656	-23
Medicaid/MCO	308	145	-163
Medicaid Dental	104	115	+11
Medicare	39	27	-12
Dual Eligible Medicare	8	20	+12
Commercial (Anthem/Sentara/CIGNA)	108	100	-8
VA Benefits	3	0	-3
Healthcare Exchange	0	0	—
Other	20	58	+38

Demographics

Age Distribution

Age group	July 2025	July 2026	Change	% Change
0–11 Months	16	5	-11	-68.8%
1–11 Years	30	16	-14	-46.7%
12–18 Years	76	49	-27	-35.5%
19–35 Years	255	242	-13	-5.1%
36–64 Years	509	639	+130	+25.5%
65+ Years	339	170	-169	-49.9%
Total	1,225	1,121	-104	-8.5%

Race & Ethnicity

All racial/ethnic groups declined modestly in proportion with the overall volume reduction, suggesting no single group drove the patient count pullback. Hispanic patients remained the largest group at 409 (down from 453), followed by White (256, down from 284), Black (215, down from 239), Other (200, down from 248), and Asian (41, down from 46). The relative racial/ethnic composition of OTMDC's patient base is stable.

Race/ethnicity	July 2025	July 2026	Change	% of July 2026
Hispanic	453	409	-44	51.3%
White	284	256	-28	32.1%
Black	239	215	-24	27.0%
Other	248	200	-48	25.1%
Asian	46	41	-5	5.1%

Gender

Gender	July 2025	July 2026	Change
Male	436	395	-41
Female	789	726	-63

Sliding Fee Scale (Federal Poverty Level)

All sliding fee tiers declined in proportion with overall volume. Level B (at or below 100% FPL) remained the largest tier at 349, confirming OTMDC's core population continues to be deeply low-income. Level I (Insured) declined to 465 from 555 the prior year, tracking the Medicaid/MCO shortfall and overall volume reduction. Non-compliant patients improved slightly to 53 (from 57 in July 2025), consistent with the improving trend observed in recent months.

FPL level	July 2025	July 2026	Change
Level B — 100% FPL & Below	386	349	-37
Level C — 101–138% FPL	151	143	-8
Level D — 139–166% FPL	66	64	-2
Level E — 167–200% FPL	29	27	-2
Level F — 201–250% FPL	18	13	-5
Non-Compliant Patients	57	53	-4
Full Fee	8	7	-1
Level I (Insured)	555	465	-90

Locality (Patient Origination)

All primary service area localities declined proportionally with the overall volume reduction. James City County fell from 706 to 630, Williamsburg from 211 to 183, and York County from 131 to 114. Newport News dropped from 105 to 95. The geographic composition of OTMDC's patient base remains stable — the pullback is volume-wide rather than geography-specific.

Locality	July 2025	July 2026	Change
James City County	706	630	-76
City of Williamsburg	211	183	-28
York County	131	114	-17
Newport News	105	95	-10
King William	29	24	-5
Gloucester	18	15	-3
New Kent	19	16	-3
Hampton	13	11	-2
Surry	9	7	-2
King Queen	6	6	0
Richmond	1	0	-1

Locality	July 2025	July 2026	Change
Other	18	17	-1

Rolling Trend — July 2025 through July 2026

The table below spans the last 13 months, bridging the close of FY2026 and the opening of FY2027. July 2026 data is shaded. The Medicaid/MCO slow recovery — from a low of 86 in May to 104 in June and 145 in July — is the most strategically significant trend to monitor in the months ahead.

Month	Patients	Visits	Uninsured	Medicaid/MCO
Jul 2025	878	1225	501	141
Aug 2025	885	1162	463	218
Sep 2025	822	1133	430	153
Oct 2025	954	1400	516	148
Nov 2025	752	1013	417	106
Dec 2025	801	1107	439	145
Jan 2026	855	1163	459	171
Feb 2026	936	1299	548	168
Mar 2026	978	1376	541	196
Apr 2026	875	1266	480	116
May 2026	704	935	420	86
Jun 2026	779	1060	458	104
Jul 2026	797	1121	656	145

Trend interpretation: Patient volume in July 2026 (797) is lower than the corresponding July 2025 figure (878) but broadly in line with recent months (May: 704, June: 779).

Of Note: ALT Thoughts...

- Dental visits grew 14.5%, a strong service line performance that may reflect improved scheduling efficiency, dental provider availability.
- Medicaid/MCO reached 145 — the highest since March 2026 — suggesting the three-month recovery trend may be meaningful.
- Non-compliant sliding fee patients declined slightly to 53 (from 57 PY), continuing the improving trend from recent months.
- OTMDC's core service area (JCC, Williamsburg, York County) remains geographically stable with no significant access disruption in any jurisdiction.

Clinical Assistant Patient Collections

January – July 2026 · Seven-Month Performance Report

YTD total (Jan–Jul)

\$140,936

7 months

Best month overall

\$27,217

April 2026

Avg monthly total

\$20,134

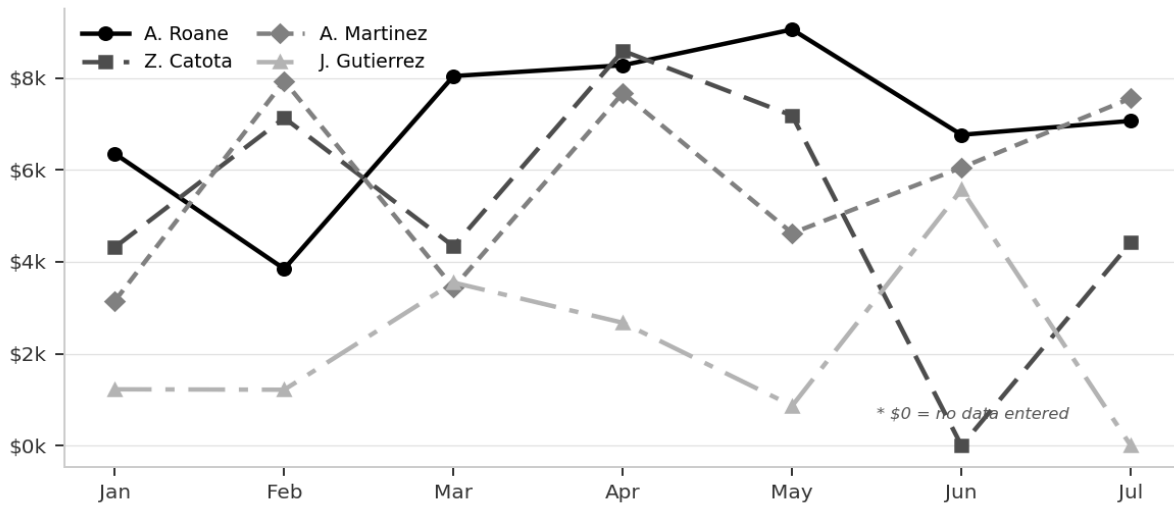
Jan–Jul 2026

New staff member

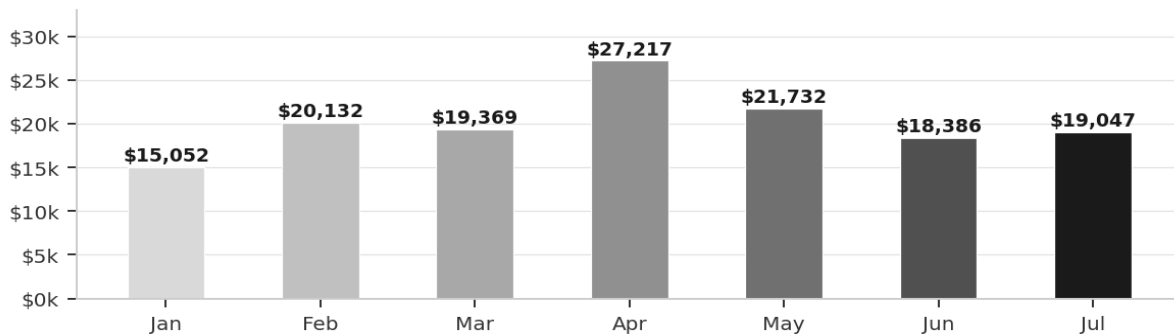
Lilli Hrcir

Added Aug 2026 forward

INDIVIDUAL STAFF TRENDS — MONTHLY COLLECTIONS (JAN–JUL)



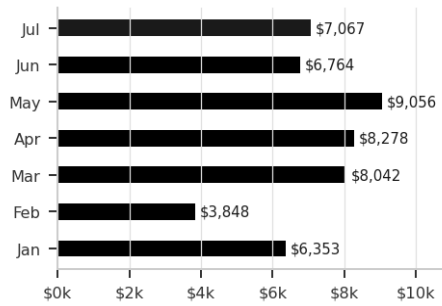
COMBINED MONTHLY TOTALS — ALL STAFF



Alexis Roane

\$49,408 YTD

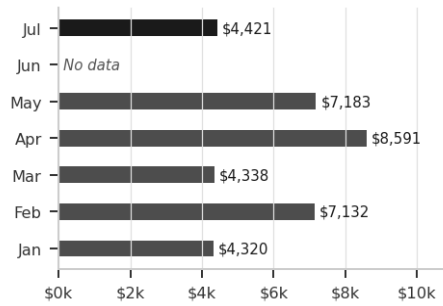
YTD leader - 7-month high in May



Zulma Catota

\$35,986 YTD

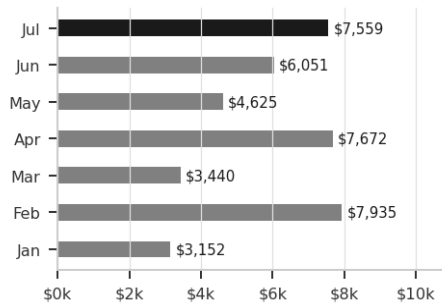
June \$0 — verify in Epic



Abraham Martinez

\$40,434 YTD

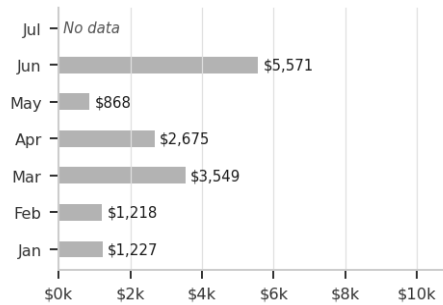
July best since Feb - 183 transactions



Julie Gutierrez

\$15,108 YTD

May + July missing — follow-up needed

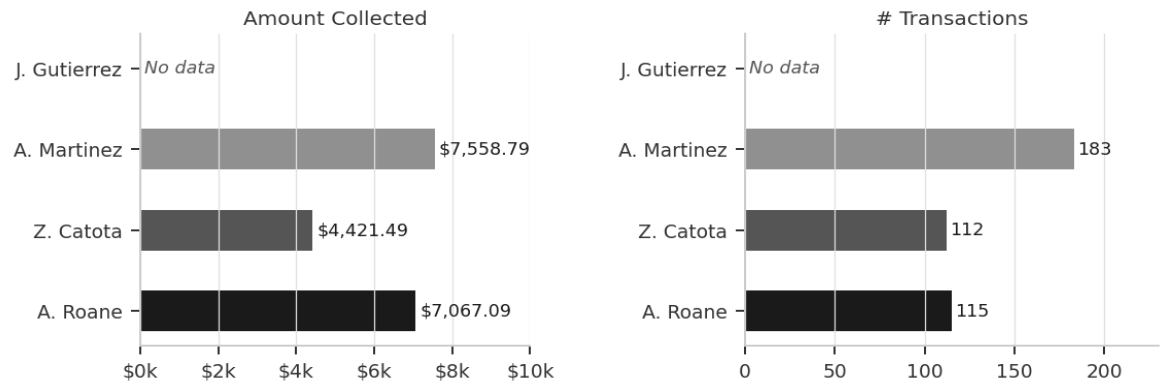


July 2026 — Monthly Deep Dive

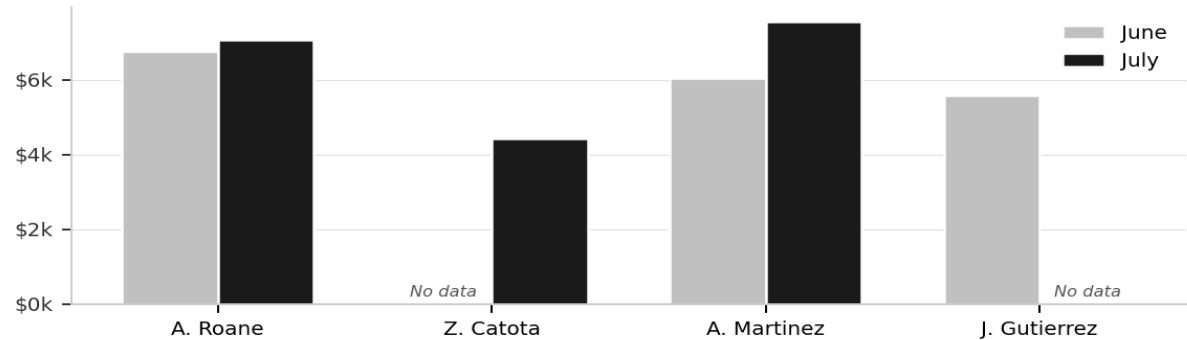
Collections · Transactions · June vs. July Comparison · YTD Context

July total collected \$19,047 vs. \$18,386 in June	July transactions 410 Roane · Catota · Martinez only	July leader A. Martinez \$7,559 · 183 transactions	Data gaps 2 entries Catota Jun · Gutierrez Jul
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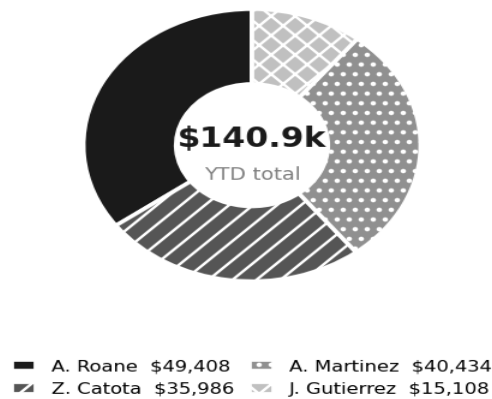
JULY 2026 — COLLECTIONS & TRANSACTION VOLUME BY STAFF



JUNE vs. JULY — SIDE-BY-SIDE COMPARISON



YTD SHARE OF COLLECTIONS (JAN-JUL)



Staff Member	YTD Total	Share of Total	Avg / Month
Alexis Roane	\$49,408.34	35.1%	\$7,058.33
Zulma Catota	\$35,985.61	25.5%	\$5,140.80
Abraham Martinez	\$40,434.30	28.7%	\$5,776.33
Julie Gutierrez	\$15,107.69	10.7%	\$2,158.24
TOTAL	\$140,935.94	100.0%	\$20,133.71

JULY 2026 — DETAIL TABLE

Staff Member	Jul Collected	Jun Collected	MOM Change	Jul Txns	YTD Total
Alexis Roane	\$7,067.09	\$6,764.38	+4.5%	115	\$49,408.34
Zulma Catota	\$4,421.49	No data	N/A	112	\$35,985.61
Abraham Martinez	\$7,558.79	<i>\$6,051.01</i>	+24.9%	183	\$40,434.30
Julie Gutierrez	<i>No data</i>	\$5,570.69	-100.0%	<i>No data</i>	\$15,107.69
TOTAL	\$19,047.37	\$18,386.08	+3.6%	410*	\$140,935.94

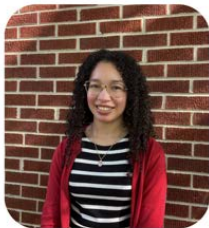
* July transaction count excludes Julie Gutierrez (no data entered). June transaction counts not recorded in source file.



ASSISTANT BUSINESS MANAGER

WELCOME EDDIE

I was born and raised in NJ, but moved to Williamsburg a few years ago to be closer to my retired parents. I started out my career as a Transportation Logistics Coordinator with J.B. Hunt, and most recently completed three years with Cardinal Health as a Clinical Operations Analyst. In my free time, my wife and I enjoy spending time with our dog Chloe and trying out different restaurants. I am excited to play a small part in the James City County ecosystem, and look forward to serving the community at OTMDC.



MARKETING AND
COMMUNICATIONS
SPECIALIST

WELCOME ANABELLE

I'm from New York but moved to Williamsburg as a kid and have loved growing up here. In my free time, I love to crochet and vend at markets around town. If you see my crochet booth at 2nd Sundays, come say hi! My goal during this transition is to continue spreading the word about OTMDC to the community and to bring a fresh approach to our social media!



CLINICAL ASSISTANT

WELCOME LILLI

I grew up in Toano, VA for most of my life and recently graduated from the University of Virginia with a degree in computer science and Japanese. I am now working as a clinical assistant at OTMDC to connect more with my hometown and community. I'm excited to join the team!

438 B





American Heart Association®
Heart Walk®

WELCOME



EXECUTIVE BREAKFAST



AT THE HEART ASSOCIATION,
WE BELIEVE THAT

Healthy employees
are the heart of a
healthy business.

Aaron Thompson
Olde Towne Medical & Dental Center



American Heart Association
Heart Walk.

Board Member

Clinical Department Update

Submitted By: Kendra Robinson, FNP 08/8/2026

Clinic staff Update:

- We continue to interview prospective candidates for the Open Access provider position and plan to make an offer very soon.

Volunteer Specialty Care

- July 2026 the following specialties provided 30 visits to uninsured patients.

Cardiology: 3 visits	Chiropractor: 2 visits
Gastroenterology: 2 visits	GYN: 8 visits
Nephrology: 0 visits	Ophthalmology: 8 visits
Sports med/ortho: 9 visits	

Community Involvement:

- Gloucester Matthews Care Clinic (GMCC) and OTMDC collaboration for eye care update:
 - 7/2026:
 - No GMCC patients were scheduled for diabetic eye exam at OTMDC in July.
- Williamsburg House of Mercy:
 - No patients seen at the July HOM clinic. Next clinic date at WHOM is set for Aug. 13, 2026.
- WJCC Schools Immunization clinic
 - For the past few years, OTMDC has provided immunizations for the students of WJCC schools. In an effort to streamline the strenuous process and serve more students, this year OTMDC will host the vaccine clinics at Olde Towne. The original date of August 7th was cancelled as there were NO patients scheduled. New dates are August 21st from 9am -4pm and August 26th from 9a-4p. For uninsured patients there will be a \$10 fee per child and for children with Medicaid, OTMDC will bill insurance. Students with private insurance will be ineligible for the vaccine clinic because OTMDC will be using VVFC vaccine which is designated only for uninsured children, underinsured children and children with Medicaid.



To assure access to quality health and wellness care to the residents and workforce of the greater Williamsburg community.

July 2026 Departmental Update

Business Office

- Olde Towne received a settlement of nearly \$80,000 from Medicaid resulting from Jacob's FY25 cost report submission.
- Allscripts PM (the part of Allscripts used for scheduling and financial processing) has been upgraded, though further upgrades are still upcoming. We've begun pre-upgrade tasks in collaboration with Optimize IT, Layer 9 and Allscripts.
- All dental equipment was back online for the month of July after some tech issues that disrupted the use of the panoramic x-ray machine in June.
- Jacob will complete the VDH grant summary report before the end of August and submit to JCC for audit purposes.
- The business office is excited to welcome Eddie Vestergaard to the team as our new Assistant Manager! Training is going smoothly with Mr. Vestergaard already having made meaningful contributions to some tasks.
- The business office continues to provide any requested items due to JCC and Cherry Beakart for the FY26 audit.
- Jacob is currently working with Sentara regarding a number of Commercial Insurance claims for OB services that were denied incorrectly. Once this issue is corrected, OTMDC should receive payment between 7-10 thousand dollars.
- FY26 was closed and documented properly in Allscripts. Reports will be sent to JCC on Monday 8/10.
- The business office is working closely with Mr. Gary Preston of DataGration to correct some of the budget submissions in MUNIS that resulted in some accounts seeming over budget (though in actuality the budget amount was initially entered into MUNIS incorrectly resulting in the account(s) showing over budget).
- We continue to work with JCC to complete all period 13 entries for FY26. Once completed, reports will be made available.

Date: 08/05/2026

By: Margaret "Maggie" Beamon

Medication Access Program

- For the fiscal year 2026, MAP requested 2,909 medications on behalf of 338 patients which were valued at \$2,977,807.74.
- For the month of July, MAP requested 270 medications on behalf of 107 patients which were valued at \$234,255.70.

Operations Manager

- Our new clinical assistant, Lilli Hrncir, started on 08/03/2026.
- Starting in March 2026, I implemented a friendly competition between the clinical assistants to see who could collect the most during that month and due to the positive response, we will continue going forward.
 - Our July winner was Abraham Martinez and he collected \$7,558.79.



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Dental Department Report August 2026 | Lorenzo Modeste, DDS

As we move further in to the summer season, Olde Towne dental clinic continues to heat up with new patients!

We recently had a walk-in emergency male patient in tears from a toothache. The staff informed our clinic that he had been to the emergency room and was given a prescription for pain medication. When he arrived at the clinic, he was in serious distress and was somewhat incoherent. He was taken back into the clinic and we were able to extract several teeth. He was truly grateful that we were able to address his pain and treat him with care and attention. This story is truly the reason why we exist. To help the community and the underserved!

For the month of July, the clinic treated 293 patients and 340 visits were completed. Old town dental clinic continues to provide optimal treatment and care to our patients.



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Communication & Development | Susan Dunn

June/July 2026

Development

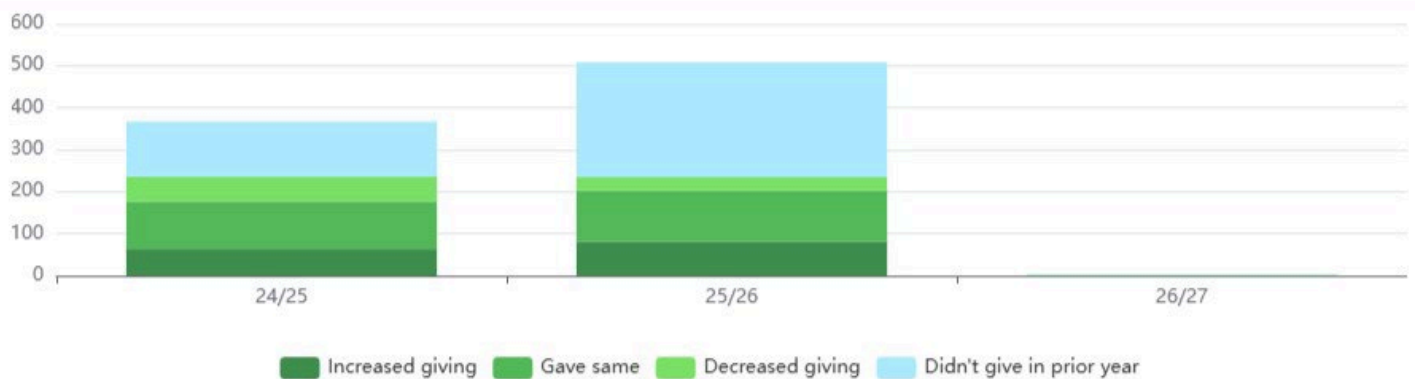
- Events/Fundraising
 - o Stride for Wellness
 - Working with JCC and Kingsmill to secure permits for the November run.
 - Currently have 2 sponsors (total of \$1000), 1 commitment for the main sponsor (\$5000), and 7 runners signed up.
 - We still need event sponsors, patient sponsors, as well as donated items for the raffle.
 - o FY26 Events ROI

Fundraiser	Date	Revenue	Expenses	ROI
Make A Will	8/1/2025	\$ -	\$ 100.62	\$ (100.62)
Impact Report	9/30/2025	\$ 7,495.00	\$ 1,992.05	\$ 5,502.95
Local Fundraiser Nights	10/11/2025	\$ 866.00	\$ -	\$ 866.00
Stride For Wellness 2026	11/1/2025	\$ 13,923.00	\$ 6,019.61	\$ 7,903.39
Giving Tuesday	12/2/2025	w/ tech cpn	\$ 195.00	\$ (195.00)
Technology Capital Campaign	12/31/2025	\$ 23,147.56	\$518.70	\$ 22,628.86
GiveLocal757	5/5/2026	\$ 2,670.00	~	\$ 2,670.00
FC Tournament & Campaign	5/6/2026	\$ 82,451.22	\$ 13,557.90	\$ 68,893.32
Stride For Wellness 2027	6/30/2026	\$ 615.00		
Support OTMDC Donations	6/1/2026	\$ 258,034.00		\$ 258,034.00
Totals		\$ 389,201.78	\$ 22,383.88	\$ 366,202.90

- Outreach
 - o Attended the ECPI Community Resource & Health Fair. Attendance was sparse consisting mostly of students. However, I was able to let those in attendance become aware of us and that we welcome patients from Newport News. I also made a few good contacts.
 - o Outreach was slower over the summer (it normally is), but there are 2 events in August we will be attending.
- Volunteers
 - o Worked with Mr. Thompson to complete NAP credits for Volunteer Providers and donors.

- Volunteer hours are still light due to the majority of our volunteers being students and away for the summer. However, late July there has been an uptick in interest applications being submitted.
- Donor Management
 - Donations captured in our Donation Program for the previous fiscal year are below. These are captured differently from the business office, for example a credit card fee is recorded as part of a donation but not deposited into the bank.

Donor Giving Compared to Prior Year



Last updated: 07/10/26 at 06:58 AM

Fundraising Totals

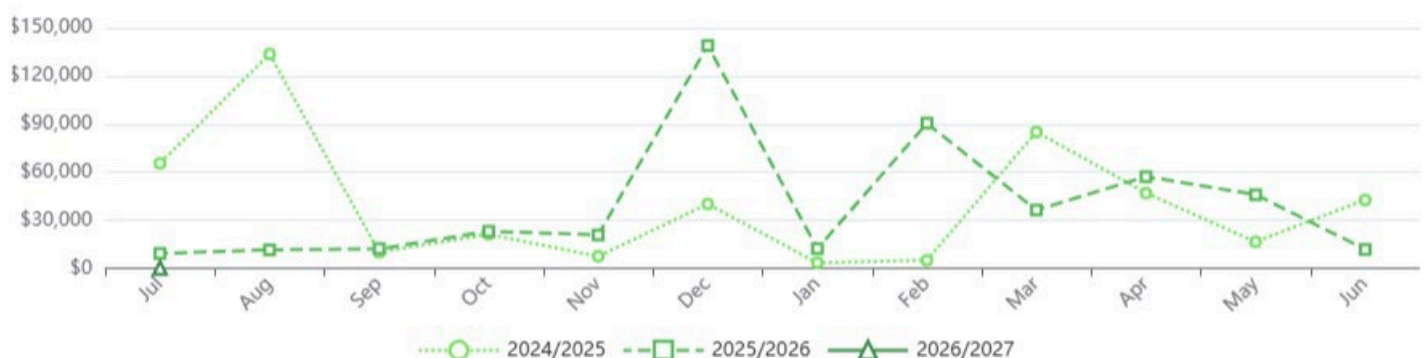
Year Month

	24/25	25/26	26/27
Gifts	479 / \$478,000.78	672 / \$470,121.21	3 / \$176.50
In Kind	0 / \$0	1 / \$250	0 / \$0
Other Income	0 / \$0	1 / \$61,933	0 / \$0
Pledges	0 / \$0	0 / \$0	0 / \$0
Installments	0 / \$0	0 / \$0	0 / \$0

Last updated: 07/10/26 at 06:58 AM

Total Raised by Month, Year over Year

Calendar Fiscal



Last updated: 07/10/26 at 06:58 AM

Communication

- Content Creation
 - Graphic content created to be aired on JCCTV and the Rec Center TV.
 - Currently working on the FY26 Impact Report, it is 95% complete and should be mailed before the end of the month.
 - Completed compiling and creating a user-friendly listing of FY26 Donors. This is available on our website under Thank You.
 - Currently working on updating our brochure.
 - Created and submitted the Staff and Volunteer Newsletters.
- Website Management
 - Updates to the Board Portal
 - Created a more streamlined look for the donor page to include QCD and DAF donations as well as Legacy Giving
- Board and Committee Support
 - Updates for the new fiscal year are complete.
 - With the new fiscal year please take the time to update the legal documents, they can be found on the online Directors Portal and I will have hard copies at the August Board Meeting.
 - The changes to the handbook are in our online Directors Portal, and hard copies will be available at the August Board meeting.
 - Calendar invites for all committees have been sent. If they have not auto populated into your calendar let me know and I can resend the invitation. Keep in mind that the Board meetings, and Finance and Executive committees will have 2 invites. One for the regularly scheduled meetings and 1 for a date change meeting due to the November holidays.
 - The online Directors Portal can be accessed from our website, otmdc.org, and is found under More in the menu. The password is Otmdc5249. Items in the portal are:
 - BoD FY27 Handbook
 - FY27 Handbook Updates
 - FY27 Meeting Calendar
 - BoD contact information
 - Board Packet Archive
 - Legal Documents

MATTHEW WHALEY ELEMENTARY

Popsicles with the Principals!



¡Paletas heladas con los Directores!

You're invited!

Cool off with a free popsicle and meet the Matthew Whaley principals and staff! Come say hello, ask questions, and kick the school year off with something sweet. Students and their families from Merrimac Crossing are all welcome.

¡Están invitados!

Refrésquense con una paleta helada gratis y conozcan a los directores y al personal de Matthew Whaley. Vengan a saludar, hacer preguntas y comenzar el año escolar con algo dulce. Invitamos a todos los estudiantes y a sus familias de Merrimac Crossing.

AUG

13

 Thursday, August 13 Jueves, 13 de agosto

 4:30 – 5:30 PM 4:30 – 5:30 p.m.

 Merrimac Crossing Apartments — Across From the Leasing Office
Apartamentos Merrimac Crossing — Enfrente de la oficina de administración

See you there! • ¡Nos vemos allí!





Real People Educating Others

REAL PEOPLE EDUCATING OTHERS

BACK TO SCHOOL EVENT

AUGUST 22, 2026

10:00AM – 1:00PM

WHAT TO EXPECT



SCHOOL
SUPPLIES
& GIFTS



FREE FOOD
& FUN
GAMES



MUSIC &
ENTERTAINMENT



GIVEAWAYS
& MORE!

HOSTED BY

RPEO & 757 GIVEBACK COMMITTEE



4460 LONGHILL ROAD, WILLIAMSBURG, VA 23188

QUESTIONS?

CONTACT RENELDO RANDALL

757-876-0155

www.rpeova.org

admin@rpeova.org

LET'S
LEARN.
GROW.
SUCCEED.

FREE
FAMILY
FUN!

Building
Brighter
Futures
Together!





*Caring Today,
Stronger Tomorrow*

Healing Hands

Helpful Hearts

HEALTH FAIR

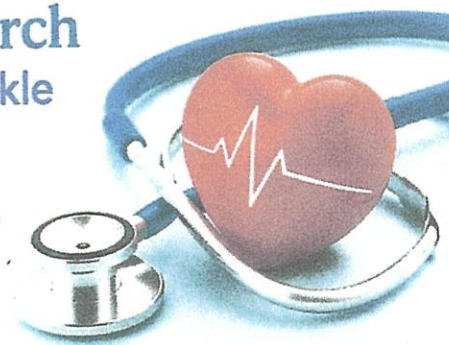

Saturday, August 22, 2026
10 am – 2 pm



SPONSORED BY
Providential Rain Church
Pastors Olanda & Carles Hankle



LOCATION
Williamsburg Recreation Center
8301 Longhill Rd.
Williamsburg, Va.



HEALTH
EDUCATION



WELLNESS
RESOURCES



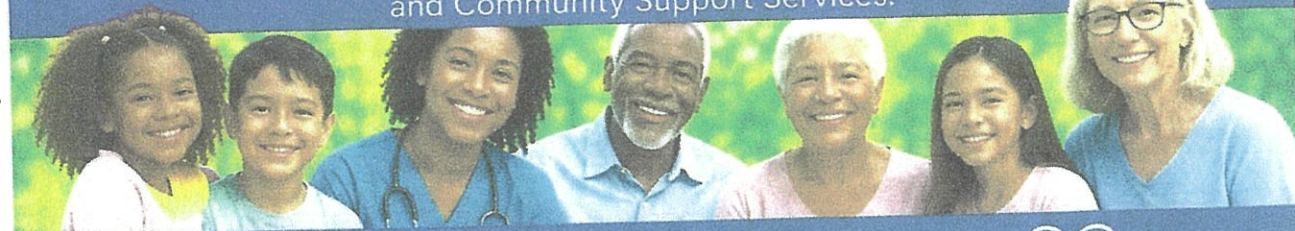
SCREENINGS



COMMUNITY
SUPPORT
SERVICES

—  *Pediatrics to Geriatrics*  —

Health Education, Wellness Resources, Screenings
and Community Support Services.



For more information contact
Judith Hester at 757-741-8513



Olde Towne Medical and Dental Center Communications & Development Plan

Rolling/Monthly

- Slides to Community TV Channels
- Social media relevant to events/fundraising
- Press Announcements
- Corporate Giving Requests

August 2026

- Back to School Events – Vaccines, back to school supplies, Head Start lead screening, W&M student volunteer recruitment
 - Pops with the Principal 8/13
 - RPEO 8/22
- Make-a-Will Month – mailings and social media. Provide outreach to regional attorneys.
- Donor Advised Funds – distribute DAF flyers to financial advisors
- August 2-8 – National Health Center Week <https://www.nachc.org/events/national-health-center-week/> - Social media created for each day. Events being planned
- Design Planned Giving brochure
- Healing Hands Healthcare tabling event
- Grants:
 - Labcorp Foundation

September 2026

- House of Mercy Community Resource Day 9/1/26
- Peninsula Agency on Aging Healthy Aging Conference: 9/15/26
- Grants:
 - Dominion Charitable Foundation
 - Virginia Sargeant Reynolds Foundation

October 2026

- Here 4 The Girls 10/3/26
- October 8 – National Donor Advised Funds (DAF) Day
- Canvass for run sponsors

November 2026

- November 7 – Stride for Wellness
- Sentara Mammogram Van
- Grants:
 - Wawa Foundation
 - Langley Family Foundation
 - TownBank Foundation

December 2026

- Dec 1 – Giving Tuesday: Peer 2 Peer campaign with board members
- Grants:

- Peoples Bank Foundation,
- Bernardine Franciscan Sisters Fdn
- Williamsburg Comm Foundation Spring Round

January 2027

- Grants:
 - Dr. Scholl Foundation LOI

February 2027

- Give Kids A Smile: 2/6/27
- JCC Community Health Fair
- Grants:
 - The Bolger Foundation
 - The Cabell Foundation – Touch base re: Capital Campaign
 - Dominion Charitable Foundation
 - Atlantic Union Bank

March 2027

- OTMDC "A Wine & Chocolate Affair" fundraising reception
- Grants:
 - Dr. Scholl Foundation
 - Dominion Charitable Foundation
 - Gwathmey Memorial Trust
 - Morgan Trust
 - Gloucester Community Foundation
 - Bank of America Foundation

April 2027

- Nominate OTMDC for Greater Wmsbg Chamber of Commerce Non-profit of the Year
- Community Baby Shower
- WJCC Schools Kindergarten Registration

May 2027

- Grants:
 - Virginia Sargeant Reynolds Foundation

Sara E. Lewis
Grants & Development Coordinator
August 14, 2026, Board Report

FY2026

Competitive Grant Awarded in June

- **George J. & Effie L. Seay Foundation** – Received \$10,000 for Behavioral Health.

This brings the total of competitive grants and foundation/corporate donations to \$105,000 for FY26

FY2027

Decisions Due in October – \$20,000

- **Dr. Scholl Foundation** – Requested \$20,000 to fund the Greater Williamsburg Healthcare Access Sustainability Initiative. Decision in October 2026; disbursement in November 2026.

Decisions Due in November – \$120,000

- **Peninsula Community Foundation** – Impact 100 - \$45,000 for Behavioral Health
- **Delta Dental of Virginia Foundation** – Requested \$75,000 for Panoramic X-ray, software, and installation.

Decision Due in January 2027 - \$173,000

- **Elevance Health Foundation** – Requested \$173,000 for Maternal and Infant Health Nutrition Program.

Other

- August Make-A-Will Month outreach
- Developed Planned Giving Guide with Susan Dunn
- Researching local/regional corporate, individual, and family charitable foundations
- “Food Is Medicine” pilot program planning with Virginia Peninsula Foodbank
- See Communications & Development Team Rolling Plan