



# Board Meeting

September 9<sup>th</sup>, 2026

5:00 pm

Zoom & In-Person

**Dr. Becca Bruhl, Board Chair**

**Aaron Thompson, ED**



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

Board of Directors Meeting  
September 9, 2026 | 5:00 PM

- 1) Call to Order and Attendance | Dr. Rebecca Bruhl, Board Chair
- 2) Consent Agenda | Dr. Rebecca Bruhl, Board Chair
  - a) Board of Directors Minutes | August 12, 2026
- 3) State of the Facility Reports | 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 | Ms. Susan Dunn
  - f) Marketing & Communications | Ms. Anabelle Diaz
  - g) Grants & Development | Ms. Sara Lewis
- 4) Committee Reports
  - a) Finance Committee | Ms. Melissa Tucker, CPA, Chair
  - b) Governance & Nominating | Dr. David Aday, Chair
  - c) Planning & Performance | Mr. Scott Herr, Chair
  - d) Ad Hoc Committee | A. Thompson & Dr. B. Bruhl
- 5) New Business
  - a) Closed Session: Executive Director Appraisal | Board of Directors
- 6) Next Board Meeting | October 14, 2026
- 7) Adjourn



# Consent Agenda

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Dr. Rebecca Bruhl, Board Chair

## Board of Directors

August 12, 2026 | 5:00 PM

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

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

The meeting was called to order by Dr. Rebecca Bruhl, Board Chair.

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

#### Approval of Minutes

- Board of Directors Minutes | July 15, 2026
- Executive Committee | July 22, 2026
- Finance | July 22, 2026

#### Motion

A motion to approve the consent agenda, with the noted correction, was made by Barbara Null and seconded by Karen Stokes. The motion carried.

#### Correction

Doug Holroyd was added to the list of absences for the July Finance Committee meeting.

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

#### Facility Update | Mr. Aaron Thompson, Executive Director

- The most current Medicaid Cost Report reflected an increase of appx. \$80,000 in funds.

- The Board acknowledged Williamsburg Hotel & Motel Association as the Exclusive “Stride for Wellness” sponsor.
- The facility will return to using Crystal reporting platform to gather dashboard information.
- New employees were announced: Lily Hrnir, Front Office; Edward Vestergaard, Business Office Assistant Manager; and Anabelle Diaz, Marketing & Communications.
- The Impact Report has been completed. It will to be sent to print.
- Follow My Health is currently in use.
- Mr. Thompson will submit a funding request to the City of Newport News when the window opens for FY’28 funding cycle.
- VCHA has announced an increase in its annual financial support.

#### Clinical Update | Kendra Robinson, NP

- No questions or comments were raised.

#### Business Office | Jacob Cooper

- No questions or comments were raised.

#### Operations | Maggie Beamon

- No questions or comments were raised.

#### Dental | Dr. Modeste

- No questions or comments were raised.

#### Communication & Development | Susan Dunn

- Board members were asked to assist with sponsorship outreach for the Stride for Wellness Run.

#### Grants & Development | Sara Lewis

- An update was provided on current grant activity, legacy giving, and planned giving.

## IV. Committee Reports

#### Finance Committee | Ms. Melissa Tucker, CPA, Chair

- No significant updates to report.

#### Governance & Nominating | Dr. David Aday, Chair

- The August meeting was postponed to later this month. Updates will be given at the next board meeting.

#### Planning & Performance | Mr. Scott Herr, Chair

- The August meeting has been cancelled. Updates will be given after the October meeting.

## V. New Business

#### Ad Hoc Committee

- Mr. Thompson recently met with the Executive Director of ARC to discuss the organization's approach to its capital campaign.
- Mr. Thompson will reach out to Mr. Reinheimer in the coming weeks to regarding the building.

- The committee discussed whether to conduct a feasibility study. The committee determined that, regardless of the outcome of a study, the organization would need to move forward. It was noted that the Board already has knowledge of many of the areas a feasibility study would address and could assist with that work.

#### SQCN

- Due to internal changes at Sentara, we have re-started the EPIC process with their team, led by Dr Dickinson.

#### Behavioral Health

- The Board discussed several opportunities to utilize graduate students who need clinical hours. A supervisor would be required to be on site.

#### Executive Director Annual Review

- Dr. Bruhl will distribute the Executive Director's annual review by email. Board members are asked to review the materials upon receipt. A discussion and compensation vote will take place at the next Board meeting.

#### VI. Next Meeting

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September 9, 2026 at 5:00 pm

#### VII. Adjournment

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##### Motion to Adjourn

A motion to adjourn was made by Barbara Null and seconded by Karen Stokes. The motion carried..



# State of the Facility

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**Aaron Thompson, ED**

# OTMDC

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## Monthly Financial Overview

July 2026 — Fiscal Year 2027, Month 1 of 12

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**Prepared by: Aaron L. Thompson, MBA, CRHCP, CMR**

Executive Director & CEO

Olde Towne Medical & Dental Center

## I. Headline

July is structurally the lightest revenue month of our fiscal calendar: most institutional funders (local government, WHF, Sentara, VCHA) have not disbursed, while personnel costs — roughly 90% of monthly spend — are fixed and evenly distributed. A large July deficit is therefore expected and not, on its own, a signal that the full-year budget is off track.

## II. Revenue Detail

### A. Local Government: \$63,500 — 10% of Budget

The headline percentage overstates the health of this line. The full detail shows the entire July total is attributable to York County; JCC — OTMDC's largest local government funder — contributed nothing in July, a reversal from the same period last year.

| Line                          | July 2026       | Annual Budget    | %          | July 2025        | Δ |
|-------------------------------|-----------------|------------------|------------|------------------|---|
| JCC Contribution              | \$0             | \$394,933        | 0%         | \$98,797         |   |
| Williamsburg Contribution     | \$0             | \$129,265        | 0%         | \$0              |   |
| York Contribution             | \$63,500        | \$127,582        | 50%        | \$61,933         |   |
| <b>Total Local Government</b> | <b>\$63,500</b> | <b>\$651,780</b> | <b>10%</b> | <b>\$160,730</b> |   |

### B. Patient Revenue:

| Line                               | July 2026       | Annual Budget      | %         |
|------------------------------------|-----------------|--------------------|-----------|
| Net Medicaid — Medical             | \$9,121         | \$260,000          | 4%        |
| Net Medicaid — Dental              | \$7,755         | \$280,000          | 3%        |
| Self-Pay Net Revenue               | \$18,780        | \$287,000          | 7%        |
| Dental — Commercial                | \$6,084         | \$120,000          | 5%        |
| Commercial Insurance               | \$5,401         | \$85,000           | 6%        |
| JCC Screening/Exams                | \$3,527         | \$50,000           | 7%        |
| Dual Eligible Insurance            | \$1,622         | \$20,000           | 8%        |
| Medicare                           | \$1,019         | \$20,000           | 5%        |
| Capitation Payments                | \$755           | \$6,000            | 13%       |
| <b>Total Gross Patient Revenue</b> | <b>\$54,065</b> | <b>\$1,194,000</b> | <b>5%</b> |

### C. Public Support: \$18,773 — 4% of Budget

| Source                  | July 2026 | Annual Budget | %    |
|-------------------------|-----------|---------------|------|
| Individual Giving       | \$8,773   | \$200,000     | 4%   |
| Foundation Giving       | \$10,000  | \$10,000      | 100% |
| Corporate Contributions | \$0       | \$200,000     | 0%   |

| Source                      | July 2026       | Annual Budget    | %         |
|-----------------------------|-----------------|------------------|-----------|
| Local Organizations         | \$0             | \$17,000         | 0%        |
| <b>Total Public Support</b> | <b>\$18,773</b> | <b>\$427,000</b> | <b>4%</b> |

**ALT Note:** Foundation Giving hit its full annual target in month one — likely a single early grant payment. Individual Giving is off to a modestly stronger start than the same point last year. .

#### D. Special Events / Fundraising: \$332 — Dormant, As Expected

Both the Golf Event (\$25) and Fundraising Events (\$307) are essentially inactive in July, consistent with these back-loaded activities on the fiscal calendar.

#### E. Grants: \$0 — Every Line at Zero

WHF (\$0 of \$900,000 – received but not allocated as of July)

### III. Expenditure Detail

Total expenses of \$240,476 (6% of the annual budget) are tracking close to the straight-line pace of 8.3%, with personnel and non-personnel both running favorably overall.

| Category                   | July Actual      | Annual Budget      | %         |
|----------------------------|------------------|--------------------|-----------|
| Salaries — Full-Time       | \$148,006        | \$2,126,175        | 7%        |
| Salaries — Temp/Part-Time  | \$3,954          | \$47,552           | 8%        |
| Benefits                   | \$64,302         | \$884,991          | 7%        |
| <b>Total Personnel</b>     | <b>\$216,262</b> | <b>\$3,058,718</b> | <b>7%</b> |
| Insurance                  | \$8,416          | \$25,000           | 34%       |
| Space Rental               | \$0              | \$189,700          | 0%        |
| All Other Non-Personnel    | \$12,279         | \$455,350          | 3%        |
| <b>Total non-personnel</b> | <b>\$24,214</b>  | <b>\$671,050</b>   | <b>4%</b> |
| <b>TOTAL EXPENSES</b>      | <b>\$240,476</b> | <b>\$3,732,268</b> | <b>6%</b> |

#### B. Receivables

| Receivable                               | 6/30/2026        | 7/31/2026        | Month Change    |
|------------------------------------------|------------------|------------------|-----------------|
| Medicaid                                 | \$21,255         | \$23,606         | +\$2,351        |
| Self-Pay                                 | \$420,777        | \$421,872        | +\$1,095        |
| Dental                                   | \$25,201         | \$29,021         | +\$3,820        |
| Commercial Insurance                     | \$9,612          | \$10,840         | +\$1,228        |
| <b>Total Receivables</b>                 | <b>\$483,353</b> | <b>\$491,812</b> | <b>+\$8,459</b> |
| <b>Net Receivables (after allowance)</b> | <b>\$364,399</b> | <b>\$372,548</b> | <b>+\$8,149</b> |

# Clinical Assistant Patient Collections

January – July 2026 · Seven-Month Performance Report

YTD total — 3 staff (Jan–Jul)

**\$125,828**

Roane · Catota · Martinez

Best month overall

**\$27,217**

April 2026

Avg monthly total

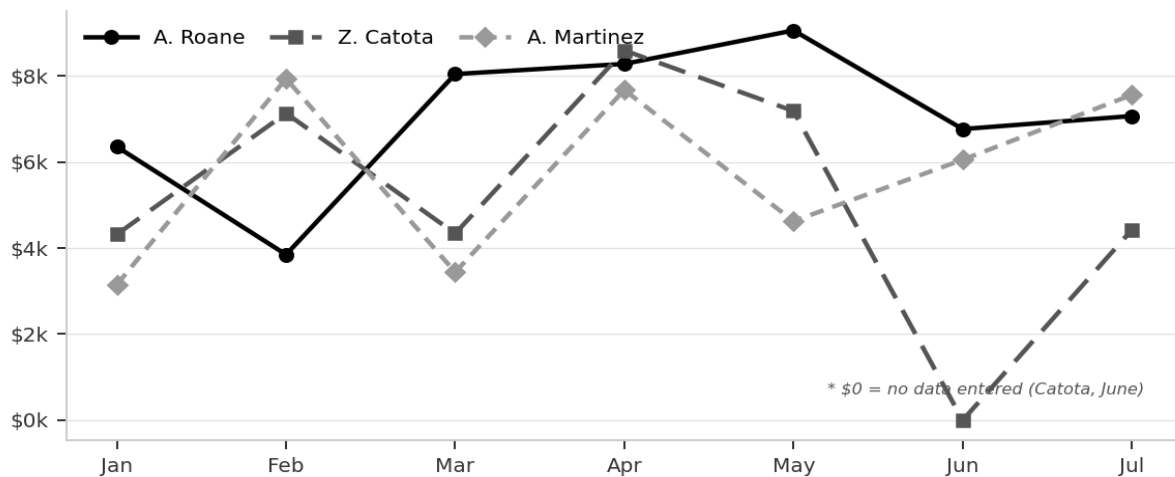
**\$20,134**

All staff · Jan–Jul 2026

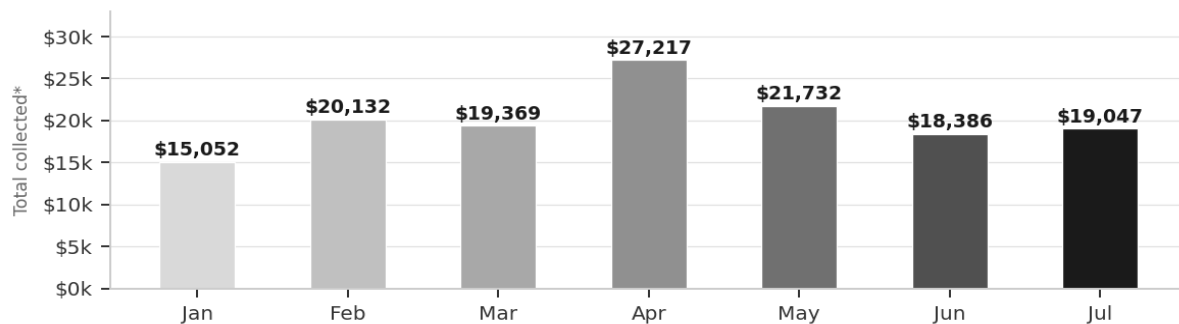
New staff member

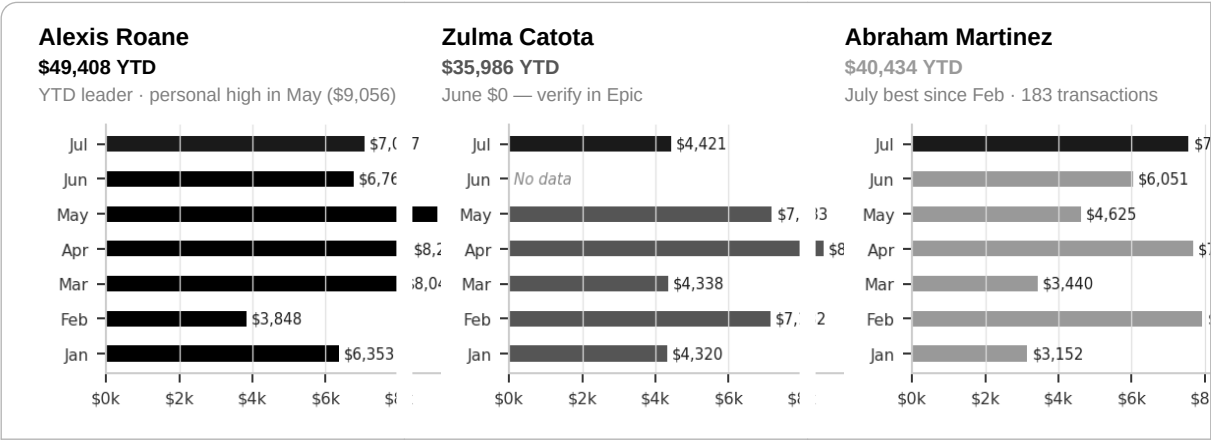
**Lilli Hrcir**

Active from August 2026



## COMBINED MONTHLY TOTALS — ALL STAFF (ORGANIZATIONAL)





KEY OBSERVATIONS

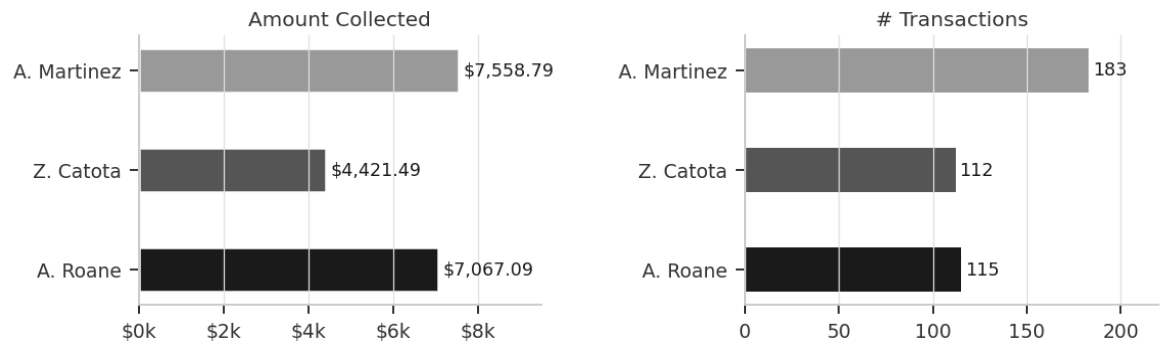
|                                               |                                                                                                                                                             |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strong YTD trajectory                         | Three tracked staff collected \$125,828 through July — on pace to exceed \$215,000 for the year. April remains the monthly high at \$27,217 (all staff).    |
| Abraham Martinez — best month since February  | July's \$7,558.79 on 183 transactions is his highest transaction volume of the year, signaling positive momentum heading into Q3.                           |
| Zulma Catota — June data gap ■                | \$0 recorded for June with no transaction count. Please confirm in Epic whether this reflects an absence, entry error, or other cause before distributing.  |
| New staff — Lilli Hrcncir onboarded in August | Hrcncir posted \$3,515 on 32 transactions in her first recorded month (August 2026). Leadership should establish collection benchmarks for her ramp period. |

# July 2026 — Monthly Deep Dive

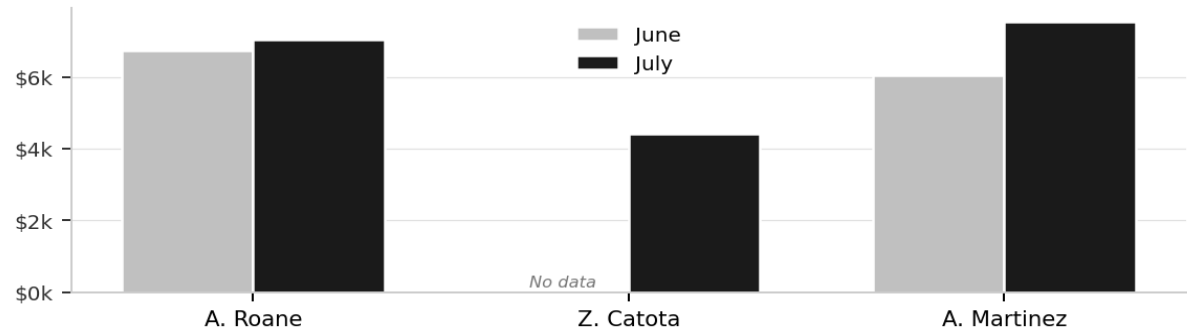
Collections · Transactions · June vs. July · YTD Context

|                                                                             |                                                                             |                                                                 |                                                                            |
|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------|----------------------------------------------------------------------------|
| July collected (3 staff)<br><b>\$19,047.37</b><br>Martinez · Roane · Catota | July transactions<br><b>410</b><br>Martinez 183 · Roane 115 ·<br>Catota 112 | July leader<br><b>A. Martinez</b><br>\$7,559 · 183 transactions | MOM vs. June<br><b>+3.6%</b><br>Org total · Jun \$18,386 → Jul<br>\$19,047 |
|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------|----------------------------------------------------------------------------|

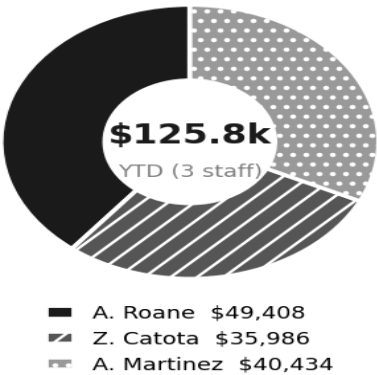
## JULY 2026 — COLLECTIONS & TRANSACTION VOLUME



## JUNE vs. JULY — SIDE-BY-SIDE COMPARISON



## YTD SHARE & SUMMARY (JAN-JUL · 3 STAFF)



| Staff Member     | YTD Total    | % of Total | Avg / Month |
|------------------|--------------|------------|-------------|
| Alexis Roane     | \$49,408.34  | 39.3%      | \$7,058.33  |
| Zulma Catota     | \$35,985.61  | 28.6%      | \$5,140.80  |
| Abraham Martinez | \$40,434.30  | 32.1%      | \$5,776.33  |
| TOTAL            | \$125,828.25 | 100.0%     | \$17,975.46 |

| 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         | \$6,051.01          | +24.9%       | 183        | \$40,434.30         |
| <b>TOTAL</b>     | <b>\$19,047.37</b> | <b>\$18,386.08*</b> | <b>+3.6%</b> | <b>410</b> | <b>\$125,828.25</b> |

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Virginia Department of Labor and Industry  
Interstate Corporate Center, Building 6  
6363 Center Drive, Suite 101  
Norfolk, VA 23502  
P: 757-455-0891 Ext. 480  
F: 757-455-0899  
doli.virginia.gov

*Olde Towne Medical + Dental Center*

TO: Facility Director FROM: ~~Your name~~ Savannah Smith  
FAX: 757-220-1953 PAGES: 4  
PHONE: 757-259-3258 DATE: August 17, 2026  
RE: \_\_\_\_\_ CC: \_\_\_\_\_

Comments:

*upon receiving this,*

*Please contact me at:*



(757) 455-0891 EXT 480  
FAX: (757) 455-0899  
SAVANNAH.SMITH@DOLI.VIRGINIA.GOV  
WWW.DOLI.VIRGINIA.GOV

**SAVANNAH SMITH  
INDUSTRIAL HYGIENIST  
HEALTH COMPLIANCE OFFICER**

DEPARTMENT OF  
LABOR AND INDUSTRY  
COMMONWEALTH OF VIRGINIA

INTERSTATE CORPORATE CENTER BLDG. 6  
6363 CENTER DRIVE, SUITE 101  
NORFOLK, VA 23502-4102



**COMMONWEALTH of VIRGINIA**  
**DEPARTMENT OF LABOR AND INDUSTRY**  
**TIDEWATER REGIONAL OFFICE**

James S. Frederick  
COMMISSIONER

Interstate Corporate Center, Bldg. 6  
6363 Center Drive, Suite 101  
Norfolk, Virginia 23228  
Phone: (757) 455-0891  
Fax: (757) 455-0899

August 17, 2026

Olde Towne Medical and Dental Center  
Attn: Facility Director  
5249 Olde Towne Road  
Williamsburg, Virginia 23188

Subject: Olde Towne Medical and Dental Center  
5249 Olde Towne Road  
Williamsburg, Virginia 23188  
Complaint Number 2479281

Dear Facility Director,

On August 13, 2026, the Virginia Occupational Safety and Health (VOSH) Program received a notice of alleged unsafe conditions at your above worksite. This is a notification via fax of these alleged hazards on August 17, 2026. The specific nature of the alleged hazards is as follows:

- Employees working in the medical facility are exposed to the following hazards:
1. Employees are experiencing extreme fatigue, dizziness, sleepiness, headaches, and lethargy while working at the facility. Employees feel better after leaving work or opening windows. Management was made aware of these concerns but nothing has been done. The Fire Department was recently called out due to concerns for Carbon Monoxide, which resulted in the building being evacuated and cleared. Employees are continuing to feel these concerns.
  2. There have been pipe leaks in the ceiling which has caused suspicions of mold in the building.
  3. There is an infestation of centipedes all over the building.

We have not determined whether the hazards, as alleged, exist at your workplace; and we are not conducting an inspection at this time. However, since allegations of workplace hazards have been made, we request that you immediately investigate the alleged conditions and make

any necessary corrections or modifications within (5) five work days from receipt of this notification by telephone.

Please provide the date when the corrective action was actually COMPLETED and give a brief statement explaining what corrective actions were made.

NOTE: When responding, if your corrective actions for any given complaint item cannot be completed until a future date - due to ordering parts, repair contracts, etc. - then we will need a follow-up letter from you confirming completion of abatement on the affected item(s).

Please also provide supporting documentation of your findings, including any applicable measurements or monitoring results, and photographs which would demonstrate elimination of the hazard, as well as a description of any corrective action you have taken or are in the process of taking. If you believe a complaint item is not valid then please state why. To facilitate providing our department with a timely response you may, if desired, fax your response to us at (757) 455-0899.

This letter is not a citation or a notification of proposed penalties. Our goal is to ensure that hazards are promptly identified and eliminated. We also encourage employee participation in investigating and responding to any alleged hazard. However, if we do not receive a written response from you by August 24, 2026, indicating that appropriate action has been taken or that no hazard exists and why, a VOSH inspection may be conducted. An inspection may include a review of the following: injury and illness records and any required programs such as hazard communication, personal protective equipment, emergency action or response, bloodborne pathogens, confined space entry, lockout/tagout, and other related safety and health issues.

The State of Virginia offers VOSH Consultation services, without charge, to assist in resolving all occupational safety and health issues. The variety of services available or the scheduling of those services may be limited by the consultation project's requirement to give priority to small businesses in high hazard industries and by its case backlog. You may also be able to obtain similar services from your insurance carrier or private consultant. To discuss or request the services, please contact:

Sarah Smith  
Consultation Program Manager  
757-455-0891 Ext 432

You are required by VOSH laws and regulations to post a copy of this letter and your response to it where it will be readily accessible for review by all of your employees and to return a copy of the signed Certificate of Posting (Attachment A enclosed) to this office. In addition, you are required to provide a copy of this letter and your response to it to a representative of any recognized employee union or safety committee if these are at your facility. Failure to do this may result in an on-site inspection. A copy of this letter and your response may also be furnished to the complainant.

Please note that Va. Code §40.1-51.2:1 states that no persons shall discharge or in any way discriminate against an employee because the employee has filed a safety or health complaint or has testified or has otherwise acted to exercise his/her rights under the safety and health provisions under this Title for themselves or others. Adverse action taken against an employee who has filed a complaint or has engaged in an occupational safety and health activity protected by the Labor Laws of Virginia can result in a VOSH onsite inspection.

If you have any questions concerning this matter, please contact this office. Your personal support and interest in the safety and health of your employees is appreciated.

Sincerely,

A handwritten signature in black ink, appearing to read "Jessica Steeves". The signature is fluid and cursive, with the first name "Jessica" written in a larger, more prominent script than the last name "Steeves".

Jessica Steeves  
Regional Health Director  
Virginia Occupational Safety and Health

Enclosure: Attachment A

Attachment A

CERTIFICATE OF POSTING

VOSH NOTIFICATION OF ALLEGED HAZARD(S)

Complaint Number 2479281

Date of Posting: \_\_\_\_\_

Date Copy Given to an  
Employee Representative: \_\_\_\_\_

On behalf of the employer, I certify that a copy of the complaint letter received from the Virginia Occupational Safety and Health (VOSH) Program has been posted in a conspicuous place, where all affected employees will have notice, or near such location where the alleged hazardous condition(s) occurred, and such notice has been given to each authorized representative of affected employees, if any. This notice was or will be posted for a minimum of ten (10) working days or until any hazardous conditions found are corrected.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Employer/Establishment Name



**August 19, 2026**

Virginia Department of Labor and Industry  
Virginia Occupational Safety and Health Program  
Tidewater Regional Office  
6363 Center Drive, Suite 101  
Norfolk, Virginia 23502

**RE: Complaint No. 2479281**  
**Olde Towne Medical & Dental Center**  
**5249 Olde Towne Road, Williamsburg, Virginia 23188**

Dear Ms. Steeves:

Olde Towne Medical & Dental Center (OTMDC) acknowledges receipt of the Virginia Occupational Safety and Health (VOSH) notification dated August 17, 2026. We take the health and safety of our employees, patients, volunteers, and visitors seriously and appreciate the opportunity to respond to the concerns raised.

Importantly, OTMDC's investigation and response to the employee and facility concerns have included precautionary evacuation, emergency response, communication with James City County Risk Management and Facilities, maintenance intervention, employee reporting guidance, and continued monitoring.

Our findings and corrective actions regarding each allegation are summarized below.

**1. Employee Symptoms / Carbon Monoxide and Air-Quality Concerns**

On August 5, 2026, several OTMDC nursing staff members reported lethargy, fatigue, and/or exhaustion. The cause was unknown. There were concerns about possible carbon monoxide exposure.

The James City County Fire Department responded to OTMDC, which is in the Human Services Building, after being called by the onsite security guard, Beth Richards. The building was evacuated as a precaution.

The Fire Department's incident report documents that crews entered the building with gas-monitoring equipment and searched the entire facility for carbon monoxide, hydrogen sulfide, and low oxygen levels, finding nothing. The incident was subsequently cleared without further action.

Aaron Thompson, Executive Director of OTMDC, notified James City County Risk Management of the employee concerns on July 12, 2026, and requested guidance regarding appropriate next steps.

James City County Risk Manager Cathy Binczak subsequently consulted with Fire Chief Sweet on August 17, 2026, regarding the specific testing conducted during the August 5 response. Risk Management advised OTMDC that the Fire Department tested for:

- carbon monoxide;
- hydrogen sulfide; and
- low oxygen levels.

According to the information provided by Chief Sweet through Risk Management, **nothing of concern was detected.**

OTMDC also advised Risk Management that the employees initially reporting lethargy worked in the same general vicinity. Following the initial reports, **no additional complaints or issues were reported to OTMDC.**

Risk Management advised that employees who believe they are experiencing a work-related injury or illness may contact Company Nurse to report a workers' compensation claim and obtain appropriate medical evaluation through the County's panel of physicians. The County's written workplace injury procedure similarly provides for reporting through Company Nurse and access to approved medical providers. Staff was notified on August 19, 2026.

Based upon the Fire Department investigation and information provided by James City County Risk Management, OTMDC has no evidence establishing the presence of carbon monoxide, hydrogen sulfide, an oxygen-deficient atmosphere, or another identified gas hazard in the facility.

## **2. Water Intrusion / Ceiling Leak and Concern Regarding Mold**

The VOSH notification also references pipe leaks and employee concerns regarding possible mold.

On August 11, 2026, the James City County Fire Department responded to an automatic alarm associated with the mechanical/HVAC area. The Fire Department determined that water was leaking onto a detector. Facilities personnel responded, and the Fire Department reported no hazards during its investigation.

The Fire Department returned later that day following another alarm activation. During that response, water was identified as affecting the HVAC system and detector. Facilities personnel responded and removed the affected detector from the HVAC system. The alarm condition was addressed, the building was placed on fire watch, and the Fire Department documented "**No other hazards on scene.**"

James City County Risk Management subsequently advised OTMDC that Facilities addressed the mechanical room drip on August 14. According to Risk Management:

- Facilities personnel observed **no visible mold** while performing the work;
- water from the drip **did not migrate into the remainder of the building;** and
- the water fell onto **concrete and diverted into a floor drain.**

James City County Facilities is tracking this corrective action through **Work Order #112137.**

Risk Management most recently advised OTMDC that the work order remains open because Facilities is **awaiting the vendor's return to replace the affected smoke detector** before closing the work order.

Accordingly, the identified mechanical-room drip has been addressed; however, the associated corrective action remains **in progress pending replacement of the smoke detector and final closure of Work Order #112137**.

OTMDC will obtain and retain documentation confirming completion of the replacement detector and closure of the work order.

At this time, OTMDC has not identified or received documentation establishing the presence of mold, leaks or moisture in the facility. Nevertheless, Risk Management has advised OTMDC that environmental air-quality sampling can be conducted as an additional precaution to evaluate for potential hidden mold. OTMDC is evaluating that additional measure.

### **3. Reported Centipede/Pest Activity**

The VOSH notification also alleges a centipede infestation throughout the building.

Risk Management advised that County Facilities personnel are **not aware of any service calls regarding centipedes in the building**.

Risk Management further advised that OTMDC may submit a Facilities work order requesting pest-control treatment. However, the building is sprayed quarterly in January, April, July, and October. They just completed the regular spraying on July 3, 2026.

### **4. Corrective Actions and Continuing Follow-Up**

Based upon the investigation and documentation currently available, OTMDC has taken or is taking the following actions:

1. **Emergency investigation:** OTMDC evacuated the facility and involved the James City County Fire Department when a potential environmental concern was reported.
2. **Environmental monitoring:** The Fire Department investigated the entire building and as subsequently confirmed by Risk Management through Fire Chief Sweet, tested for carbon monoxide, hydrogen sulfide, and low oxygen levels. Nothing of concern was detected.
3. **Risk Management notification:** OTMDC proactively escalated employee fatigue/lethargy concerns to James City County Risk Management on August 12, prior to VOSH's receipt of the complaint.
4. **Employee medical reporting:** Employees who believe they are experiencing a work-related illness or exposure have access to the County's established Company Nurse/workers' compensation reporting and medical-evaluation process.
5. **Water-intrusion repair:** James City County Facilities addressed the identified mechanical-room drip. According to Risk Management, no visible mold was observed, and water did not migrate into the remainder of the building.

6. **Smoke-detector replacement:** Work Order #112137 remains open pending vendor replacement of the affected smoke detector. OTMDC will document completion when the work order is closed.
7. **Pest-control follow-up:** OTMDC requested pest-control inspection/treatment and will continue monitoring for reported or observed pest activity.
8. **Additional environmental evaluation:** OTMDC is evaluating environmental air-quality sampling as an additional precaution to further address the concern regarding possible hidden mold.

OTMDC believes the available documentation demonstrates a prompt, responsible, and continuing response to the concerns raised.

We have not identified evidence establishing the presence of carbon monoxide, hydrogen sulfide, an oxygen-deficient atmosphere, mold, or another environmental hazard within the facility. At the same time, we recognize that the absence of a detected hazard does not eliminate our responsibility to investigate employee concerns and address identified facility conditions.

For that reason, OTMDC has continued working with James City County Risk Management, County Facilities, emergency services, and our employees to investigate reported concerns and implement appropriate corrective actions.

OTMDC appreciates the opportunity to respond and remains committed to providing a safe environment for our employees and the individuals we serve.

Please contact me should you require additional information or documentation.

Sincerely,



**Aaron L. Thompson, MBA, CRHCP, CMR**

Executive Director | CEO

Olde Towne Medical & Dental Center

5249 Olde Towne Road, Suite D

Williamsburg, Virginia 23188

757-259-3275

August 19, 2026

Team,

I want to personally follow up on the workplace and environmental concerns that several members of our team recently raised. Most importantly, **we heard your concerns and acted on them.**

When staff initially reported fatigue, lethargy, and concerns about possible carbon monoxide or another environmental issue, we evacuated the building as a precaution and involved the James City County Fire Department. We also proactively escalated the concerns to James City County Risk Management and continued working with County Facilities to investigate the building.

I want to share several findings and actions with you:

The Fire Department conducted environmental testing throughout the building for carbon monoxide, hydrogen sulfide, and low oxygen levels. Nothing of concern was detected.

- A subsequent water drip in the mechanical/HVAC area affected a smoke detector and resulted in fire-alarm activations. **The water issue was addressed by County Facilities.** We have been advised that no visible mold was observed, and the water remained in the mechanical-room area, where it drained onto concrete and into a floor drain.
- The related Facilities work order remains open while a vendor completes replacement of the affected smoke detector. We will continue following this item through completion.
- The building receives regularly scheduled pest-control treatment, and we will continue monitoring and reporting any pest concerns.
- We are continuing to evaluate whether additional environmental air-quality testing would be beneficial as an added precaution.

Based on the investigations completed to date, **we have not received evidence identifying carbon monoxide, hydrogen sulfide, an oxygen-deficient atmosphere, mold, or another environmental hazard within our facility.** At the same time, the absence of a detected hazard does not mean that we stop listening or investigating when an employee raises a concern.

If you experience symptoms or believe you may have a work-related illness or exposure, please notify your supervisor and follow the established workplace injury reporting process through **Company Nurse**. This provides an avenue for appropriate medical evaluation and, when applicable, workers' compensation reporting.

Thank you for your patience, professionalism, and continued commitment to one another and to the patients and community we serve. We will continue working with James City County Risk Management and Facilities and will communicate any significant new findings or actions to the team.

Regards,

*Aaron Thompson*  
Aaron L. Thompson

Good Morning,

I am reaching out to inform you that we have received a satisfactory response from your company based on our review of the supplemental information you provided. After review, it has been determined that the file on this matter can be closed and no further action on this complaint is anticipated at this time.

Please note that the complainant will also be given the opportunity to review the information provided in your response. If the complainant disputes the accuracy of the response, it may be necessary for VOSH to contact you for additional information or documentation of corrective action in order to resolve these issues. In some situations, it may be necessary to conduct an inspection of your workplace.

Va. Code §40.1-51.2:1 states that no persons shall discharge or in any way discriminate against an employee because the employee has filed a safety or health complaint or has testified or has otherwise acted to exercise his/her rights under the safety and health provisions under this Title for themselves or others. Adverse action taken against an employee who has filed a complaint or has engaged in an occupational safety and health activity protected by the Labor Laws of Virginia can result in a VOSH onsite inspection.

Please feel free to reach out with any questions or concerns.

**Very Respectfully,**

go AI-  
rated content  
may be incorrect.,  
Picture

**Savannah Smith**  
**VOSH Health Compliance Officer/Industrial Hygienist**  
Virginia Department of Labor and Industry  
(757) 455-0891 Ext. 480 (o)/ (757) 455-0899 (f)  
6363 Center Drive, Suite 101, Norfolk, VA 23502  
[www.doli.virginia.gov](http://www.doli.virginia.gov)



***COMMONWEALTH of VIRGINIA***  
**DEPARTMENT OF LABOR AND INDUSTRY**  
**TIDEWATER REGIONAL OFFICE**

**James S. Frederick**  
**COMMISSIONER**

Interstate Corporate Center, Bldg. 6  
6363 Center Drive, Suite 101  
Norfolk, Virginia 23228  
Phone: (757) 455-0891  
Fax: (757) 455-0899

August 20, 2026

Olde Towne Medical and Dental Center  
Attn: Aaron Thompson  
5249 Olde Towne Road  
Williamsburg, Virginia 23188

Subject: Olde Towne Medical and Dental Center  
5249 Olde Towne Road  
Williamsburg, Virginia 23188  
Complaint Number 2479281

Dear Aaron Thompson:

On August 17, 2026, the Virginia Occupational Safety and Health (VOSH) Program notified you of alleged safety and/or health hazards at your worksite.

Your response to these allegations was received in the Regional Office on August 19, 2026.

Based on our review of the information you provided in your response to these alleged hazards, we have determined that our file on this matter can be closed and no further action on this complaint is anticipated at this time.

Please note, however, that the complainant will also be given the opportunity to review the information provided in your response. If the complainant disputes the accuracy of the response, it may be necessary for VOSH to contact you for additional information or documentation of corrective action in order to resolve these issues. In some situations, it may be necessary to conduct an inspection of your workplace.

Please note that Va. Code §40.1-51.2:1 states that no persons shall discharge or in any way discriminate against an employee because the employee has filed a safety or health complaint or has testified or has otherwise acted to exercise his/her rights under the safety and health provisions under this Title for themselves or others. Adverse action taken against an employee

who has filed a complaint or has engaged in an occupational safety and health activity protected by the Labor Laws of Virginia can result in a VOSH onsite inspection.

The State of Virginia offers VOSH Consultation services without charge, to assist in resolving all occupational safety and health issues. However, the variety of services available or the scheduling of those services may be limited by the VOSH Consultation Program's requirement to give priority to small businesses in high hazard industries and by its backlog. To discuss or request the services, please contact send an email request to [consultation@doli.virginia.gov](mailto:consultation@doli.virginia.gov) or call:

Consultation Program Manager  
804.786-7776

We appreciate your prompt response to these allegations, and your interest in the safety and health of your employees. Please feel free to contact this office if we can be of additional assistance to you.

Sincerely,

A handwritten signature in black ink that reads "Jessica Steeves". The signature is written in a cursive, flowing style.

Jessica Steeves  
VOSH Regional Health Director  
Virginia Occupational Safety and Health



## LETTER OF AGREEMENT

### Rx Partnership – AMP Clinic Agreement

This Letter of Agreement ("**Agreement**") dated as of **July 1, 2026** ("**Effective Date**"), is by and between **Rx Partnership, Inc. ("RxP")**, The Northern Neck ("**AMP Pharmacy**") and Olde Towne Medical & Dental Center ("**Clinic**"). Free Health Clinic Pharmacy

### RECITALS

- A. RxP is a nonprofit, tax-exempt organization that coordinates, manages, and oversees the operation of the Access to Medication Program ("**AMP**"). AMP provides brand and generic medications to vulnerable Virginians at healthcare facilities without a pharmacy.
- B. RxP partners with affiliate partner clinics, which serve as pharmacies for clinics without their own pharmacies that are vetted by RxP (each a "**Qualified Site**").
- C. AMP Pharmacy is an RxP affiliate partner clinic that is willing to serve as a pharmacy for Clinic.
- D. Clinic wishes to be an RxP Qualified Site in order to receive filled prescriptions from AMP Pharmacy.

### AGREEMENT

Now, therefore, in consideration of the mutual covenants and agreements contained in this Agreement, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, RxP, AMP Pharmacy, and Clinic agree as follows:

#### 1. Term and Termination

- (a) The term of this Agreement begins on the Effective Date and continues through **June 30, 2027**, or until terminated as set forth in this Agreement.
- (b) This Agreement may be terminated by any party upon sixty (60) days' written notice to the other parties, or immediately in the case of another party's breach of a material obligation of this Agreement.

#### 2. RxP Role

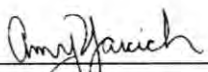
- (a) RxP serves as a broker to secure prescription medications in bulk supply from pharmaceutical companies ("**Product**") and arranges for their direct distribution from AMP Pharmacy to Qualified Sites. RxP credentials, monitors, and audits all Qualified Sites to ensure compliance with RxP policies and requirements as well as pharmaceutical company "Patient Assistance Program" eligibility and contract criteria.
- (b) Qualified Sites designated to receive filled RxP generic and brand prescriptions through AMP must be accepted by RxP into the program and follow the program rules for participation. Only individual patients from a Qualified Site that meet eligibility criteria and provide a valid prescription for an AMP Product can receive filled prescriptions. Patients must be enrolled through a Qualified Site, reside in the Commonwealth of Virginia, have a combined household income at or below 300% of the federal poverty

[Signature Page Follows]

**SIGNATURE PAGE**

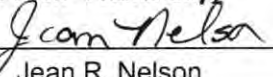
**IN WITNESS WHEREOF**, the parties have caused this Agreement to be properly and legally executed by their respective duly authorized representatives effective as of the date first written above.

**Rx Partnership, Inc.**

By:   
Name: Amy Yarcich  
Title: Executive Director  
Date: 7/23/2026

Northern Neck Free Health Clinic Pharmacy

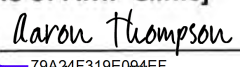
**[Legal Name of AMP Pharmacy]**

Signature:   
Printed Name: Jean R. Nelson  
Title: CEO  
Date: 8-21-2026

***I certify that I have read this document in its entirety, reviewed, and updated the Clinic's Controlled Substance Registration Policy and Procedure manual and have provided a signed copy of the Letter of Agreement to the designated Responsible Party (as per CSR license) and Clinic Eligibility Coordinator.***

Olde Towne Medical & Dental Center

**[Legal Name of AMP Clinic]**

Signature:   
Printed Name: Aaron Thompson  
Title: Executive Director  
Date: 8/31/2026

# COME SEE THE FUTURE OF EMERGENCY RESPONSE IN ACTION!



# Introducing the **Solution.**

*Delivering Hope. Saving Time. **Saving Lives.***



**RESTOR**e** CARE** uses drone technology to rapidly deliver AEDs to cardiac arrest emergencies—bridging the gap until help arrives.

## **WHY IT MATTERS:**



### **Saves Critical Time**

Drones can deliver an AED in minutes—faster than traditional response.



### **Improves Survival Outcomes**

Early defibrillation can double or triple a person's chance of survival.



### **Reaches More People**

Ideal for remote areas, large events, and hard-to-reach locations.



### **Empowers Communities**

A visible, innovative solution that strengthens community preparedness and resilience.



**RESTOR**e**-CARE**

JAMES CITY COUNTY, VA

*Technology in the sky. **Hope** on the ground.*

# RESTORe-CARE

*Every Saved Minute, Saves Lives*



**THE MISSION:** RESTORe-CARE is a clinical research study testing whether drones can deliver an AED to victims of out-of-hospital cardiac arrest faster than traditional first-responder systems.



**WHY IT MATTERS:** Survival from cardiac arrest decreases by **7–10% for every minute** without defibrillation. Drones have the potential to get an AED to the scene faster—**bridging the gap until help arrives.**



**WHY JAMES CITY COUNTY:** JCC was selected as a RESTORe-CARE pilot study site (**one of only 2 sites in the country**) due to our large geographic area, longer transport times, and strong commitment to innovation and community safety.

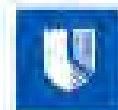


**STRONG PARTNERSHIP:** This study is a collaboration among researchers at Duke University and Virginia Commonwealth University (VCU), and our local partners: **James City County Police and Fire Departments and Peninsula Regional Emergency Communications.**



**RESTORe-CARE**

JAMES CITY COUNTY, VA



**DukeHealth**

**VCU**

# AROUND THE "TOWNE"

August 2026



## A Message From The Executive Director



We're excited to unveil a brand-new look and name for our newsletter — welcome to Around the "Towne"! With a refreshed format, we're bringing you the latest news, updates, and stories from across Olde Towne Medical & Dental Center in a whole new way.

We're also just getting started in our new fiscal year, and the momentum so far has been strong and encouraging — a great sign of what's ahead for OTMDC.

We're also thrilled to welcome three new faces to the OTMDC family:

- Edward Vestergaard, Assistant Business Manager
- Anabelle Diaz, Marketing & Communications
- Lilli Hrncr, Clinical Assistant (Front Office)

Please join us in giving them a warm welcome as they get settled into their roles!

### National Health Center Week



Since 1993, Olde Towne Medical and Dental Center has been committed to ensuring that quality healthcare is accessible to everyone regardless of income, insurance status or background. What began as a mission to meet a critical community need has grown into a comprehensive healthcare home offering medical and dental care, behavioral health, vision, prenatal care, health education, and so much more.

During National Health Center week, we celebrated not only our history, but the incredible people who make our mission possible:

### August Is Make A Will Month



Have you made plans for your assets at the end of your life? Did you know there are significant benefits to having a plan in place when the time comes?

By including gifts and donations to causes YOU care about like OTMDC in your plans, you can maximize the impact in your community while benefiting you and your loved ones financially and emotionally.

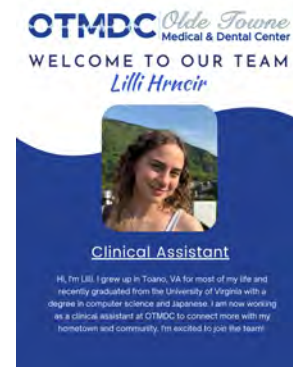
### Meet Our New Hires



our patients, dedicated staff, volunteers, community partners, and generous donors. Your support has helped us expand access to care, strengthen families, and build a healthier community for generations to come.

To our donors, thank you for believing in our mission and investing in the health and well-being of our community. Your generosity makes a lasting difference and allows us to continue providing care to those who need it most.

Thank you for being part of the Olde Towne story.



## UPCOMING EVENTS

### Stride For Wellness Fundraiser Run



Join us for Olde Towne's Stride for Wellness on Saturday, November 7th and help support quality healthcare for our community!

Whether you're racing the 10K, enjoying the 5K, or bringing the whole family for the Healthy Hike Fun Run, every step you take helps Olde Towne Medical & Dental Center continue providing compassionate, affordable healthcare to those who need it most.

Register to run today by visiting: [bit.ly/StrideforWellness](https://bit.ly/StrideforWellness).

Not interested in running? Become a sponsor or volunteer at the event. We will also accept any in kind donations that are race specific or raffle items.

### Student Vaccine Clinic



Back to school season is here! Make sure your student has the required vaccines before the first day of school. Join us at our upcoming vaccine clinic to help your family get school-ready. We look forward to seeing you!

- Vaccines required in Virginia:
  - Required for children entering kindergarten
    - DTaP (Diphtheria, Tetanus, and Pertussis)
    - Hepatitis A
    - Hepatitis B
    - MMR (Measles, Mumps, and Rubella)
    - Varicella
  - Required for children entering 7th grade
    - Tdap (Tetanus, Diphtheria, and Pertussis)
    - Human Papillomavirus (HPV)
    - Meningococcal ACWY (MenACWY)
    - Required for rising 12 graders on or after their 16th birthday
    - Meningococcal ACWY (MenACWY)

## COMMUNITY OUTREACH

### Healing Hands Helpful Hearts Health Fair

Be sure to stop by the Olde Towne Medical & Dental Center table! Our team will be there to share information about our services, answer questions, and connect you with resources available through Olde Towne.

We look forward to seeing you and being part of this great community event!



### Real People Educating Others Back To School Event

OTMDC will have a table at Real People Educating Others Back to School event! Come stop by for some free merch, learn about our services and our upcoming events! There is also a chance to win a OTMDC gift basket!

- Lafayette High School
- Saturday, August 22nd 10am-1pm



## SUPPORT OUR COMMUNITY TODAY!

Follow



[otmdc.org]otmdc.org

Donate



757-259-3258

Volunteer



office@otmdc.org



# Clinical Update

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**Kendra Robinson, NP**

## Clinical Department Update

Submitted By: Kendra Robinson, FNP 09/01/2026

- **Mission Moment:**

- WJCC Schools Immunization clinic

- Volunteers were in abundance! There were volunteer nurses who gave injections and others who were recruited to do crafts with children while they waited. There was even face painting and goodie bags for all who received shots. Huge shout out to Ms. Karen Stokes for giving shots, providing goodie bags and organizing volunteers to man the lobby and engage with the kiddos. The clinic was run very smoothly and several parents commented that they were pleasantly surprised about the minimal wait times and the efficiency of staff during the event. It was a huge success!!

- OTMDC was able to provide:

- 113 vaccines to 51 students on August 21, 2026
      - 35 vaccines to 13 students on August 26, 2026.

### Clinic staff Update:

- An employment offer has been made to an NP who has accepted with a tentative start date of 11/1/2026.

### Volunteer Specialty Care

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

|                             |                         |
|-----------------------------|-------------------------|
| Cardiology: 8 visits        | Chiropractor: 3 visits  |
| Gastroenterology: 5 visits  | GYN: 9 visits           |
| Nephrology: 3 visits        | Ophthalmology: 7 visits |
| Sports med/ortho: 10 visits |                         |

### Community Involvement:

- Gloucester Matthews Care Clinic (GMCC) and OTMDC collaboration for eye care update:
  - 8/2026:
    - No GMCC patients were scheduled for diabetic eye exam at OTMDC in August.
- Williamsburg House of Mercy:
  - No patients seen at the August HOM clinic. Next clinic date at WHOM is set for September 10, 2026.



# Business Office

---

**Jacob Cooper**



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

## **August 2026 Departmental Update**

### **Business Office**

- Eddie Vestergaard, our new Assistant Business Manager, is progressing well and learning the different aspects and tasks of the business office and revenue cycle.
- Allscripts PM has been upgraded, though further upgrades are still upcoming. We've begun pre-upgrade tasks in collaboration with Optimize IT, Layer 9 and Allscripts.
- Plans to add/reinstall Crystal Reports for our clinical services reports are ongoing with software specification verification due to occur soon.
- The VDH grant summary report was completed and submitted. We've also passed it along to Heather Modispaw as part of the audit request.
- Jacob worked with Maria Calloway of JCC for FY26 expense and revenue budget/actuals transfers as part of the audit.
- The business office has been providing any documentation and information requested by JCC and the auditors. We are up to date except for one item that is in work.
- 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. We've made further connections with points of contact - as I felt the initial responses were either incorrect or insufficient. Currently, Stephen Payne (Senior Director of Operations with Sentara Ambulatory Services Division) is in contact with Jacob and the Sentara Health Plan to help us solve the problem.
- Our facility's medical and dental equipment inspection will occur on Friday August 4<sup>th</sup>.
- We continue to work with JCC to complete all period 13 entries for FY26. Once completed, reports will be made available.



# Operations

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**Maggie Beamon**

Date: 09/01/2026

By: Margaret "Maggie" Beamon

## Medication Access Program

- o For the month of August, MAP requested 135 medications on behalf of 59 patients which were valued at \$102,010.34.
- o Attended monthly TPC Technical Zoom Meeting on August 19, 2026.

## Operations Manager

- o Training for our newest clinical assistant, Lilli Hrnir, has been going smoothly and she has proved to be an incredible asset to our OTMDC team.
- o Attended Virtual Medicaid Town Hall Meeting on August 13, 2026.
- o Patient Story: This past month a 61-year-old female walked into the office hoping to be seen on our walk-in schedule; however, it was late morning and that day happened to have no remaining appointments. I advised front desk staff to reach out to Chris Rivera, RMA to triage the patient based on the symptoms she was experiencing. Chris triaged the patient and determined she needed to be seen that day, so we added her to the schedule. The patient was seen and her immediate needs were addressed. Kendra Robinson, CFNP reached out to see if I was available to assist with Medicaid application. After her medical appointment was finished, I met with the patient to apply for Medicaid and while she was in the office, I enrolled the patient in MAP. The patient was grateful for our assistance. This is a prime example of the teamwork that occurs between the front desk and medical staff to ensure our patients receive the care they need.
- o 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.
  - o Our August winner was Alexis Roane and she collected \$8,194.64.



# Dental

---

**Dr. Modeste**



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

## **Dental Department | August 2026**

### **Lorenzo Modest, DDS**

As we begin to wind down our summer here in Williamsburg, Olde Towne Dental Clinic continues to forge ahead. The month of August has been steady and consistent!

We recently had a patient that immigrated from the Caribbean and has been a patient here at the clinic for a few months. The patient needed extensive dental treatment. We finally delivered his upper and lower prosthetics and he was so grateful for our services and gentle care. He expressed his apprehension with receiving dental treatment, because of his prior dental history and poor care. It's always humbling as a dentist to see the transformation of a patient's dental health and how it relates to their mental wellbeing.

For the month of August, the dental clinic saw 298 patients and 332 dental visits. On September 30th, Williamsburg Dental Study Club has its quarterly meeting here at Olde Towne. We usually have 15 dentists, 3-4 hygienist along with staff members. The evening meeting consists of dinner and 1-hour dental lecture. There is a wide range of topics that we cover during the quarterly meeting. It's always nice to meet our local colleagues.



# Communications & Development

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**Susan Dunn**



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

## Communication & Development | Susan Dunn

August 2026

### Development

- Events/Fundraising
  - o August 2-8 was the annual National Health Center Week. Each day was celebrated with a social media post relating to that day's theme. The business days were also celebrated in person:
    - Staff Appreciation Day: staff luncheon
    - Patient Appreciation Day: a display was set up for the week and on this day we encouraged patients to leave a note to their care team.
    - Health Conditions Day: had a variety of information available about different chronic conditions.
    - Population Focus Day: information was shared that affects our different populations (such as prenatal, aging, and children).
    - Stakeholders Day: several delegates were invited to OTMDC for a tour. Unfortunately, there were few responses and that they were not able to attend.
  - o Stride For Wellness
    - Currently at 22 runners.
    - 7 Sponsors have committed.
    - As always we ask the board to please spread the word to gain runners, sponsors, volunteers, and donations for the raffle.
- Outreach
  - o Attended the Popsicles with the Principal for Matthew Whaley students on 8/13/26 and was able to connect with several families about our services and our upcoming vaccine clinics.
  - o Ms. Diaz and myself attended the RPEO Back to School Event on 8/22/26. This was her first outreach event for OTMDC, so there was some training involved.
    - As usual this was a well-attended event and we were able to speak to many families about our services and let them know about the last date for the vaccine clinic.
  - o On the same day and time as the RPEO Event we were invited to a new event, Healing Hands Resource Event. Sara Lewis attended.
- Volunteers
  - o Currently working with Ms. Diaz training her on taking over the volunteer staff.
  - o We have had a large influx of W&M students applying to volunteer.

- o W&M Give Pulse has provided 5-6 Spanish Translator potential volunteers.
- o The W&M RAM Club is also working with us to provide some of their Spanish speaking members to volunteer. Currently 3 are available.

## Communication

- Print Content
  - o The impact report is finished and is currently at the printers and should be mailed out soon.
  - o New brochures were created (attached) in 2 versions to hopefully encompass more of our age demographic. These have been printed in English as well as Spanish.
- Digital Content
  - o Created social media graphics and content for National Health Center Week.
  - o Created social media graphics and content thanking the current sponsors of the Stride for Wellness.
  - o Created social media graphics and content announcing different aspects of our needs for Stride for Wellness, such as volunteers, sponsors, and runners, that ran weekly during the month of August.
  - o Worked on the updated OTMDC newsletter Around The "Towne". This entailed a new look and different emailing platform.
- Website Management
  - o Keeping website up to date with event announcements.
  - o Added the Impact Report to our About Us page.



**Your  
Health  
Is Our  
Mission**

# Support Us



[otmdc.org/supportus](http://otmdc.org/supportus)

## How You Can Help

- Donate
- Donor-Advised Fund
- Qualified Charitable Donation
- Leave a Legacy Beneficiary
- Volunteer Opportunities
- Event Sponsorships
- Follow Us On Social Media



**The wellness of our  
community depends  
on the support of  
our community.**

EN  
**OTMDC**  
*Olde Towne*  
MEDICAL & DENTAL CENTER



5249 Olde Towne Road  
Williamsburg, VA 23188

757-259-3258 | 757-220-1953 (fax)

Email: [office@otmdc.org](mailto:office@otmdc.org)

Visit: [otmdc.org](http://otmdc.org)



**Your  
Health  
Is Our  
Mission**

# Support Us



[otmdc.org/supportus](http://otmdc.org/supportus)

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EN  
**OTMDC**  
*Olde Towne*  
**MEDICAL & DENTAL CENTER**



5249 Olde Towne Road  
Williamsburg, VA 23188

757-259-3258 | 757-220-1953 (fax)

Email: [office@otmdc.org](mailto:office@otmdc.org)

Visit: [otmdc.org](http://otmdc.org)

# OTMDC

## Supporting The Wellness Of Our Community



We proudly serve patients with Medicare, Medicaid, commercial insurance, as well as individuals who are uninsured or underinsured. Our focus is to ensure that everyone in our community has access to high-quality, compassionate healthcare, regardless of their insurance status or ability to pay.

## About Us

Olde Towne Medical & Dental Center (OTMDC) is a comprehensive healthcare facility that provides integrated, whole-person care by addressing every aspect of an individual's health from infancy to adulthood. Our services include medical, dental, behavioral health, vision, patient education, and medication assistance.

## Our Services

- Primary Healthcare
  - Pediatric, Adolescent, Adult, and Senior
- Dental Care
  - Cleanings, Procedures & Prosthetics
- OB/GYN & Family Planning
- Vision
- Mental Wellness/Behavioral Health
- Medication Access
- Health Education

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

- ✓ On-Site Laboratory
- ✓ Expert Healthcare Staff
- ✓ Patient-Centered Approach
- ✓ Integrated Healthcare



29TH ANNUAL

# HEALTHY AGING CONFERENCE

*Aging Boldly*



September 15,  
2026



8:00 AM–  
12:30 PM



King of Glory Lutheran Church  
4897 Longhill Rd,  
Williamsburg, VA

*Free & Open to the Public*

**Register Online, Email or via Phone by September 8th**



**ONLINE:** [www.yorkcounty.gov/parksandrec](http://www.yorkcounty.gov/parksandrec)  
(Click on Special Events, Healthy Aging Conference, Add to Cart)



**EMAIL:** [parksandrec@yorkcounty.gov](mailto:parksandrec@yorkcounty.gov)  
Include Name, Address, Phone and Email



**PHONE:** (757) 890-3500



**2026 PLANNING COMMITTEE**

AARP, Olde Towne Medical &  
Dental Center, Peninsula Agency  
on Aging, York County Parks and  
Recreation, Faith in Action,  
Virginia Health Services, Brookdale  
Senior Living

29TH ANNUAL

# HEALTHY AGING CONFERENCE

*Aging Boldly*

## AGENDA

*Free & Open to the Public*

|                     |                                                                                                                                                                                                                                               |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8:00 – 9:00 AM      | Registration, Breakfast, Exhibitors & Health Screenings                                                                                                                                                                                       |
| 9:00 – 9:15 AM      | Welcome Remarks                                                                                                                                                                                                                               |
| 9:15 – 10:15 AM     | <b>Progress &amp; Possibility: The Future of Aging in our Communities</b><br><i>Moderated Panel Discussion</i><br>Featuring representatives sharing personal and professional perspectives on aging from the local, state and federal levels. |
| 10:15 – 10:35 AM    | AARP Virginia Update                                                                                                                                                                                                                          |
| 10:35 – 10:55 AM    | <b>Break</b> Exhibitors & Health Screenings                                                                                                                                                                                                   |
| 10:55 – 11:25 AM    | <b>Bold Frontiers: Turning Aging Challenges into Stories of Resiliency</b>                                                                                                                                                                    |
| 11:25 – 11:50 AM    | <b>Interactive Activity: Aging Boldly - Strong Voice, Stronger Connection</b>                                                                                                                                                                 |
| 11:50 AM – 12:15 PM | <b>The Grateful Mind: Strategies &amp; Tools for a Positive Aging Perspective</b>                                                                                                                                                             |
| 12:15 – 12:30 PM    | Door Prizes & Closing Remarks                                                                                                                                                                                                                 |

## Thank You Sponsors!

Keynote Sponsor



Title Sponsor



Breakfast Sponsor



Healthy Aging Committee





# Marketing & Communications

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**Anabelle Diaz**



## **Anabelle Diaz | Marketing and Communications Report | August 2026**

### **Events:**

- Stride for Wellness
  - o Working on getting more raffle prizes, sent emails to fitness related businesses.
- Behavioral Health Networking Event
  - o Connected with organizations dedicated to improving community wellbeing. I learned about valuable programs, services and resources that can help our patients. Susan and I took their information to pass on to OTMDC's behavioral health coordinator, Kierra Robinson.

### **Communications:**

- New newsletter format was created. Susan and I used the platform Litte Green Light instead of MailChimp as used for previous newsletters. A new name was created: Around the "Towne", formally known as The Pulse. Sent 1098 emailed newsletters and 812 (74%) opened.
- Reached out to TePe, a dental hygiene brand, and they donated 150 toothbrushes to pass out during tabling events and Give Kids a Smile
- Reached out to JCC Rec Center to add us on the list of emails for County events. Applied and got accepted to the Live Well Expo and Harvest Festival.

## **Marketing & Outreach:**

- Toured The Pavillion
  - o Learned about the services they provide, connected with the staff and toured the facility. I enjoyed the tour and look forward to building the relationship and working together to better serve our community.
- Volunteers
  - o 23 volunteers applied since August 3<sup>rd</sup>, Susan and I interviewed 11 volunteers and we have scheduled them.
- Real People Educating Others Back to School Event
  - o Held Saturday, August 22<sup>nd</sup>. Susan and I attended and were able to give out merchandise and information on OTMDC.
- Food Through Medicine program
  - o This is a collaboration with FoodBank where volunteers will be delivering meals to some of our patients. Boxes are curated to fit the patient's needs (some have diabetes or high blood sugar) and will come with information with recipes and local food pantries.

## **Social Media**

- Started an OTMDC TikTok account
- Created a social media graphic on end of year giving
- Created a social media graphic on the Behavioral Health networking event recap
- Created social media graphics for the new hires
- Created a social media graphic for the vaccine clinic



# Grants & Development

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**Sara Lewis**

**Sara E. Lewis**  
**Grants & Development Coordinator**  
**September 9, 2026, Board Report**

**YTD FY2027 - \$361,000 in Outstanding Applications to Competitive Grantors and Requests to Corporate Foundations**

**Decisions Due in October – \$20,000**

- **Dr. Scholl Foundation** – \$20,000 – Greater Williamsburg Healthcare Access Sustainability. Disbursement in November 2026.

**Decisions Due in November – \$140,000**

- **Peninsula Community Foundation – Impact 100** - \$45,000 – Behavioral Health
- **Delta Dental of Virginia Foundation** – \$75,000 – Panoramic X-ray, software, and installation.
- **Dominion Energy Charitable Foundation** - \$20,000 – Healthcare Access Sustainability. Disbursement in December 2026.

**Decision Due in December - \$28,000**

- **Ferguson Cares** - \$10,000 – Sustain Access to Healthcare.
- **The Labcorp Foundation** - \$18,000 – Behavioral Healthcare

**Decision Due in January 2027 - \$173,000**

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

**Other**

- Researching local foundations and individuals who have made recent donations of \$50,000+ to other nonprofits as prospects for our capital campaigns.
- Sent August is Make-A-Will Month email to donors.
- See Communications & Development Team Rolling Plan

**OTMDC Finance Committee**  
**August 2026**  
**Summary Report to the Board**

**Recommended Actions:**

None

**Financial Report:** attached to this report is the ‘condensed’ year to date financial report for the month ending 7/31/2026. With just one month recorded, this provides a baseline for us to start seeing trends.

**Revenue:** Total revenues from operations for the month of July and year to date (YTD) are \$137k, 4% of budget. For cash flow we received \$900k in grant income in July, which is currently recorded as unearned. This amount is expected to be moved to grant income soon. Gross patient revenue (before bad debt adjustment) is \$54k, 5% of budget. There has not been any bad debt adjustment or expense recorded yet.

Public support revenue is \$19k, which is 4% of budget.

**Expenses:** With one month or 8.3% of the year recorded but prior to year-end adjustments, total expenses are \$240k, 6% of budget. Personnel costs are 7% of budget, with other (non-salary) operating costs at 4% of budget.

Net income/<loss> from operations (revenues less expenses) YTD is <\$104k> vs. the annual budgeted net loss of <\$209k>. For the fiscal year ending 6/30/2026, the unaudited net income/(loss) from operations (without endowment changes) was <\$296k>.

The **endowment investment fund** is at \$6.835m as of July 31, 2026. The cost of the investment as of 6/30/2026 was \$6.058m. There have not been any dividends reinvested or sales recognized this fiscal year. The unrealized gain to-date is \$777.

**Current Assets:** Cash balance is \$939k, an increase of \$358k from July 31, 2025. Receivables (net of allowance for doubtful accounts) are \$373k, an increase of \$150k from the July 2025 balance.

The next committee meeting is scheduled for September 23, 2026 at 4:30 pm.

Respectfully submitted,  
Melissa Tucker, Chair, Finance Committee

**OTMDC -- Summary Financial Results: YTD 7-31-2026**

|                                        |                         |                         |                             |                         |                           |
|----------------------------------------|-------------------------|-------------------------|-----------------------------|-------------------------|---------------------------|
| <b><u>Income-Expense:</u></b>          |                         |                         |                             |                         |                           |
|                                        | <b><u>Tot. July</u></b> | <b><u>Total YTD</u></b> | <b><u>Annual Budget</u></b> | <b><u>Variance</u></b>  | <b><u>% of annual</u></b> |
| <b><u>Revenue:</u></b>                 |                         |                         |                             |                         |                           |
| Local Government                       | \$ 63,500               | \$ 63,500               | \$ 651,780                  | \$ (588,280)            | 10%                       |
| Patient Revenue                        | \$ 54,065               | \$ 54,065               | \$ 1,194,000                | \$ (1,139,935)          | 5%                        |
| Less: Bad Debt "Adjustment"            | \$ -                    | \$ -                    | \$ -                        | \$ -                    | 0%                        |
| Less: Bad Debt Expense                 | \$ -                    | \$ -                    | \$ (63,000)                 | \$ 63,000               | 0%                        |
| Net Patient Revenue                    | \$ 54,065               | \$ 54,065               | \$ 1,131,000                | \$ (1,076,935)          | 5%                        |
| Public Support                         | \$ 18,773               | \$ 18,773               | \$ 427,000                  | \$ (408,227)            | 4%                        |
| Special Events-Fundraising             | \$ 332                  | \$ 332                  | \$ 130,000                  | \$ (129,668)            | 0%                        |
| Grants                                 | \$ -                    | \$ -                    | \$ 1,183,800                | \$ (1,183,800)          | 0%                        |
| Misc. (inc. cash over/short)           | \$ -                    | \$ -                    | \$ -                        | \$ -                    | 0%                        |
| <b>Total Revenue</b>                   | <b>\$ 136,670</b>       | <b>\$ 136,670</b>       | <b>\$ 3,523,580</b>         | <b>\$ (3,386,910)</b>   | <b>4%</b>                 |
| <b><u>Expenses:</u></b>                |                         |                         |                             |                         |                           |
| <b>Total Personnel</b>                 | <b>\$ 216,262</b>       | <b>\$ 216,262</b>       | <b>\$ 3,058,718</b>         | <b>\$ (2,842,455)</b>   | <b>7%</b>                 |
| <b>Total Non-Personnel Exp.</b>        | <b>\$ 24,214</b>        | <b>\$ 24,214</b>        | <b>\$ 671,050</b>           | <b>\$ (646,836)</b>     | <b>4%</b>                 |
| <b>Furn/Equipment (Total)</b>          | <b>\$ -</b>             | <b>\$ -</b>             | <b>\$ 2,500</b>             | <b>\$ (2,500)</b>       | <b>0%</b>                 |
| <b>Total Expenses</b>                  | <b>\$ 240,476</b>       | <b>\$ 240,476</b>       | <b>\$ 3,732,268</b>         | <b>\$ (3,491,792)</b>   | <b>6%</b>                 |
| <b>Net Income</b>                      | <b>\$ (103,807)</b>     | <b>\$ (103,807)</b>     | <b>\$ (208,688)</b>         | <b>\$ 104,881</b>       | <b>50%</b>                |
| Transfer From/(To) Endowment           | \$ -                    | \$ -                    | \$ 208,688                  | \$ (208,688)            | 0%                        |
| <b>Net Cash Change After Trfr.</b>     | <b>\$ (103,807)</b>     | <b>\$ (103,807)</b>     | <b>\$ -</b>                 | <b>\$ (103,807)</b>     | <b>0%</b>                 |
| <b><u>Investment Fund Summary:</u></b> |                         |                         |                             |                         |                           |
|                                        |                         | <b><u>Curr. Mo.</u></b> |                             |                         |                           |
| Beg. Balance                           |                         | \$ 6,057,647            |                             |                         |                           |
| Cost of transfer to operations         |                         | \$ -                    |                             |                         |                           |
| Dividends reinvested                   |                         | \$ -                    |                             |                         |                           |
| Cost, 06/30/2026                       |                         | \$ 6,057,647            |                             |                         |                           |
| +/-: Gains/Losses, through 6/30/2026   |                         | \$ 777,332              |                             |                         |                           |
| +/-: Transfer from/(to) Operations     |                         | \$ -                    |                             |                         |                           |
| End Balance                            |                         | \$ 6,834,979            |                             |                         |                           |
| <b><u>Current Assets Report</u></b>    |                         |                         |                             |                         |                           |
|                                        |                         | <b><u>7/31/2026</u></b> | <b><u>YTD</u></b>           | <b><u>7/31/2025</u></b> |                           |
|                                        |                         |                         | <b><u>Diff.</u></b>         |                         |                           |
| Cash                                   |                         | \$ 938,684              | \$ 358,309                  | \$ 580,375              |                           |
| Investments                            |                         | \$ 6,834,979            | \$ (61,665)                 | \$ 6,896,644            |                           |
| <b>SUBT.</b>                           |                         | <b>\$ 7,773,663</b>     | <b>\$ 296,644</b>           | <b>\$ 7,477,018</b>     |                           |
| Total Receivables                      |                         | \$ 491,812              | \$ 142,084                  | \$ 349,728              |                           |
| Less: Allow. For Doubtful Accts.       |                         | \$ (119,263)            | \$ (21,353)                 | \$ (97,910)             |                           |
| <b>Net Receivables</b>                 |                         | <b>\$ 372,548</b>       | <b>\$ 150,261</b>           | <b>\$ 222,288</b>       |                           |
| <b>Total Current Assets</b>            |                         | <b>\$ 8,146,211</b>     | <b>\$ 1,350,220</b>         | <b>\$ 6,795,991</b>     |                           |