

Heritage on the Marina

Resident Meeting Minutes
April 26, 2025

President: Margaret Jacobs
President: Rod Dugliss
Treasurer: Jo Ann Wentker
Secretary: Yvonne Benedict

Margaret shared the results of the SF Planning Commission. The Heritage plan was approved for the plan with a caveat. There is a need for a study to determine that the new building will not interfere with the existing historic building.

Jeanne Parker Martin, President & CEO of Leading Age California came to talk about Leading Age California. Their emphasis is on helping older adults age independently and with dignity. She spoke about the need for housing, making sure that adults get long term services. She emphasized how important it is in affiliating with another company that we make sure their culture and ethnicity suits that of The Heritage. The names mentioned were Front Porch, SF Towers, and others. In joining another group, we may lose things, but we could gain much. It is hard for a small facility like ours to stay as is without joining another group.

Joanne gave the Treasurer's Report.

Katie spoke to the Bottle Bank. The program is no longer with the city, it is privately owned. So far, Katie has raised \$1,042 for the Employee Appreciation Fund. She believes this is a good program so she will continue doing it as long as her health stays good.

Michele spoke to Game Night encouraging all to attend. She is not selling any tickets, rather she is requesting that residents give donations. People have donated gifts. Anyone wanting to buy one of the gifts can do so, just donate what you think is right.

Patrick gave his report on March Madness. The total raised was \$460. The winner, Patrick, donated his share of the money to the Employee Appreciation Fund.

Before moving to the nomination of candidates for the Board of Directors, Tony discussed that April 17 ends who we are going to consider affiliating with. This has given all parties copious amounts of data to digest and discuss. Tony shared what is non-negotiable regarding the affiliation's discussions. Residents continued sharing their thoughts on the non-disclosure requirements with various insights and comments.

Finally, we decided to table the nomination of candidates and the voting procedure for the next meeting so that residents can get more clarity on the document administration.