

The  
**Loomis**  
Communities  
2023 Annual Report





## Mission Statement

We open doors to worlds of positive aging.

## Vision Statement

Building on our proud traditions of integrity, security, and hospitality, Loomis will always be a vibrant, welcoming community, providing resources to maximize well-being and personal fulfillment, while sharing our talents and strengths with all those whose lives we touch.

## Guiding Principles

At The Loomis Communities, our Guiding Principles embody those attributes that are most important to us. They guide us in our decision making, inform our daily behaviors, and collectively create the culture of a diverse organization.

At The Loomis Communities our approach to diversity is simple: embrace and engage everyone. To be engaged, you must feel included and valued. We strive to build and nurture a culture where there is a deep sense of pride, passion and belonging that transcends residents and team members and is unified in our shared commitment to social responsibility.



**Excellence** – We strive to exceed expectations by challenging ourselves and committing to continuous innovation, quality, and technological improvement. We seek excellence in what we do, in who we are as people, and as an organization.

**Leadership** – We seek out and engage the knowledge, experiences, and talents of those around us; and together we translate our vision into reality.

**Voice** – We involve and listen to the persons most impacted in decision-making, and we combine our individual voices to create a more vibrant community.



**Integrity** – We earn trust through honest, transparent, ethical decisions and actions.

**Respect** – We are committed to treating everyone with dignity, kindness, and compassion. We encourage and welcome diversity in our communities (diversity in its broadest definition) because we believe that diversity reflects our world, strengthens our efforts, and honors our mission.

**Accountability** – We take responsibility for sustaining and improving our fiscal and natural resources to provide for current needs while preserving and growing for the future.

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**“ELVIRA”** – In honor of our 120-plus year history, we chose this acronym for Elvira Whiting Ball, who pioneered senior living, and whose vision became The Loomis Communities.

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# The Loomis Communities



For more than 120 years, The Loomis Communities has been a visionary leader in senior living across the Pioneer Valley of Western Massachusetts. It was the first organization in the state to open a continuing care retirement community. Loomis has since grown into a multi-location, not-for-profit organization with three distinctive retirement communities that embrace and reflect the mission and values that have successfully guided it from the beginning.

The Loomis Communities offers an unparalleled lifestyle with superior amenities and services. As a continuing care retirement community, we provide a continuum of care that allows residents to remain in the community if increased services and additional care should be needed. All three communities are fully accredited by CARF/CCAC, so you can be assured our programs, care and financial health are of the highest quality.



## Applewood

1 Spencer Drive  
Amherst, MA 01002  
413-253-9833

Located in the Amherst countryside surrounded by picture-postcard beauty and only minutes from vibrant towns and renowned colleges, Applewood is ideally situated for an active and engaging lifestyle.



## Loomis Lakeside at Reeds Landing

807 Wilbraham Road  
Springfield, MA 01109  
413-782-1800

In a beautiful natural setting with a lake view, Loomis Lakeside at Reeds Landing provides independent living apartments and cottages, assisted living, skilled nursing care and a medical suite all under one roof. A wide variety of resident-led programs makes this a very active and social community.



## Loomis Village

20 Bayon Drive  
South Hadley, MA 01075  
413-532-5325

With a delightful array of residential choices clustered around a village center, Loomis Village's architecture is reminiscent of a picturesque New England Village. In addition to a busy calendar of on-site events, nearby Mount Holyoke College offers many cultural and educational opportunities.



# A Report from the President and CEO

When I reflect on The Loomis Communities' tagline "The Western Massachusetts Pioneer in Senior Living" I can't help but think about the group of smart, caring, ambitious women who set out to find a solution to what they saw as a problem in their community. I can only imagine the pride they would feel to look around today and see the countless lives that have been touched by their vision. The three Loomis Communities do not physically resemble the original building that opened in 1911, but the foundations are the same – communities where new friendships are formed and old friends are cherished, where people can count on each other, and every day is a new opportunity for personal growth.

This past year we have focused on several exciting initiatives. All three communities have been immersed in construction projects. Residents and team members have endured months of disruption as we work toward creating new apartments, new spaces, and updating existing ones. As we strive to meet the changing desires of residents (today's and tomorrow's) with these projects, we are grateful for the patience and enthusiasm that have been shown by everyone involved.

In keeping with Loomis' priority to take a holistic approach to serving residents with dementia by focusing on the well-being of each individual person served, we are proud to announce "OpenView", a unique cognitive health program designed to eliminate barriers and replace them with personal discovery and growth. Participants in the OpenView program will receive individualized support while also enjoying the opportunity to safely and freely move about the community. The success of the OpenView program is in its training regimen. Over the past year, countless hours of training have been presented to team members, residents, friends, and family members. We are fortunate to have specially-trained team members who can now share their extensive knowledge with the rest of us. Providing people with the knowledge and skills they need to feel confident in their ability to support those with dementia is a true gift. OpenView is indeed different and we look forward to working with people who understand there is a balance between safety, wellness, and freedom. There is a deep commitment within Loomis to continue pioneering ways to open doors to worlds of positive aging. OpenView is just the most recent example of that enduring commitment.

Thank you for being part of this important work, we could not do any of this without the generosity of our many volunteers and donors: the incredible Board of Directors, Corporators, and Committee members who give countless hours of their time to all of us; the wonderful business partners who treat our team and residents with dignity and respect; and our generous donors whose dollars support the not-for-profit mission, who we are, and all that we do. We thank you for your continued support - you make Loomis' ambitious initiatives possible.

May you all be blessed with good health and peace,

*Margaret Mantoni*  
President and CEO



# Message from the Chair, Board of Directors

As another fiscal year, and my term as Chair, ends, I want to share my sincere appreciation and gratitude for the remarkable people who make up the Loomis Communities – the amazing residents and families, the remarkable Senior Leadership Team, my dedicated fellow Directors and Corporators, our many local neighbors, vendors, partners, donors, and friends for their patience, caring and mutual support as we move our way forward to a positive future. Our need for "community" feels more vital than ever as we move through these still challenging times.

My initial intent in joining the Loomis Board years ago was in appreciation for the remarkable Team Members I had met during the many years my Mother

lived at Loomis Village. My appreciation for these wonderfully talented and dedicated individuals has only grown since then. I would like to give special thanks and respect to all these bright, resourceful, respectful individuals who bring such talent, joy, and enthusiasm to The Loomis Communities every day. These dedicated, diverse individuals help make each of our communities the welcoming, warm, hospitable places that they are. Their service and efforts are well deserving of our collective recognition and sincere praise.

Certainly, many challenges remain. But with the good faith, creativity, hard work and cooperative efforts of the entire Loomis family, we can look to build on recent successes, and continue to

forge a vibrant, sustainable future for these beautiful communities. Thanks, again, to all of you for helping to build "community" – for the adventures of the year past and the great promise of the year to come.

*Paul Lambert*  
Chair, Board of Directors



# Governance



## Applewood Resident Council

Standing (L-R): Mimi Sauer, Janet Potash, Sandi Albertson-Shea, Edith Lebowitz, Barbara Bing, Gennifer Sussman, Kathy Gregg

Seated (L-R): Judy Bianciardi, Alice Swift, Fran Bancroft, Doug Adler, John Armstrong



## Loomis Lakeside at Reeds Landing Association

Standing (L-R): Whiting Houston, Ann McIntosh, Dick Weston, Bob Law, Nancy Standel

Seated (L-R): Mary Breton, Ruth Barney, Marguerite Anastasovites, Terry Weston



## Loomis Village Resident Association

(L-R): Roger Beer, Anne Wing, David Heckman, Holly Taylor

## Board of Directors (2023-2024)

Paul Lambert

*Chairperson*

Deborah Buckley

*Vice Chairperson*

Sanford Belden

Jessica Bodon

Kathleen Bowler

Paul Breen

Seunghee Cha

Patricia Crutchfield

Fletcher Davis

Jeffrey Hayden

Erik Kjeldsen

Sara Lawrence

Thomas Pratt

Deborah Snow

Max Winters

Heather Zoeller

## Officers

Margaret Mantoni

*President and Chief Executive Officer*

Carly Cavanaugh

*Treasurer and Chief Financial Officer*

Peter Connor

*Clerk*

Carly Cavanaugh

*Assistant Clerk*

## Corporators

Sanford Belden

Angela Belmont

Jessica Bodon

Kathleen Bowler

Paul Breen

Deborah Buckley

Seunghee Cha

Casey Clark

Stephen Corrigan

Brian Craven

Catherine Craven

Harry Craven

Patricia Crutchfield

Fletcher Davis

Julie Dwight

Lili Dwight

Nancy Eddy

Esmat Ezzat

Marilyn Gass

Wayne Gass

Lawrence Gonneville

Linda Gonneville

Norman Halpern

Jean Hazen

Jeffrey Hayden

Whiting Houston, Jr.

Eric Kjeldsen

Paul Lambert

Winston Lavalley

Sara Lawrence

Mary Jo Maydew

Peter McAvoy

Ann McIntosh

Gwendolyn Morrissey

James Morrissey

Mary Alice Osgood

Anthony Pellegrino

John Pietras

Thomas Pratt

Venus Robinson

Marie Rohan

Thomas Senecal

Greg Sheehan

Deborah Snow

Kay Sordillo

Gladys Starks

Mary-Anne Stearns

Joan Steiger

Betsy Stevens

Richard Whiting, Jr.

Max Winters

Heather Zoeller

## Senior Leadership Team

Margaret Mantoni

*President and Chief Executive Officer*

Carly Cavanaugh

*Treasurer and Chief Financial Officer*

John Anz

*Director of Development and Community Engagement*

Louis Iannuccilli

*Director, Home and Community Based Services*

Kristen Lamoureux

*Executive Director, Applewood*

Maureen O'Toole

*Executive Director, Loomis Village*

Lori Todd

*Executive Director, Loomis Lakeside at Reeds Landing*

Barry Waite

*Director of Human Resources*

## Senior Leadership Team members supported these groups in 2023:

- Art for the Soul Gallery
- Association of Black Business Professionals
- Brattleboro Economic Development Council
- Bridge for Unity
- Griffins Friends
- Holyoke Chamber of Commerce
- Holyoke Public Schools
- LeadingAge Massachusetts
- MASH (“Music & Arts South Hadley”)
- South Hadley Cultural Council
- South Hadley and Granby Chamber of Commerce
- South Hadley Town Meeting
- Springfield Symphony Orchestra
- United Way
- West Springfield Capital Planning Committee



Paul Lambert, Marge Mantoni, Lori Todd, Josh Powers, and John Anz at Reader RAVES awards celebration



A “banner” year at the Pioneer Valley Walk to End Alzheimer's

# Elvira Whiting Ball 1843-1915

The Elvira Whiting Ball award is named for the founding leader of The Loomis Communities who, with a group of Holyoke women known as the *Rain or Shine Club*, over 120 years ago, decided to provide older adults a place to live “exempt from strife.” When there was no Social Security or long-term care insurance, they raised funds for construction of a home for older adults who could not afford private care. In the fall of 1911 – nine years after the organization’s founding – the first residents moved into the Holyoke Home for Aged People on Loomis Avenue, beautiful within and out, and dedicated to their comfort and happiness.

The Elvira Whiting Ball Award is presented to an individual or group that has advanced the mission of The Loomis Communities, to open doors to worlds of positive aging, and by virtue of their outstanding efforts in service to older adults.

## Prior recipients:

2002	Clarke S. Lyon	2016	Carol C. Katz
2003	1981 Loomis Board of Directors	2017	Rachel E. Tierney
2004	Lawrence R. Gonneville	2018	Alice Bonner
2005	Joan C. Steiger	2019	Cynthia Jacelon
2006	Gwendolyn Glass	2020 & 2021	
2007	Bruce A. Yarber	<i>We were unable to honor anyone in these years due to the ongoing COVID-19 coronavirus pandemic.</i>	
2008	Founding Directors of Applewood		
2009	Esmat Ezzat		
2010	Maria B. Dwight		
2011	Jeanne and Robert Potash, Lita and Ken Seyffer	2022	Mary-Anne Stearns
2012	Students of the Blessed Sacrament Intergenerational Program		
2013	Thomas R. Pratt		
2014	Kathy Bowler		
2015	Founding Directors of Loomis Lakeside at Reed Landing		



## The Award for Inspirational Aging

*The Award for Inspirational Aging was created in 2020 to celebrate and honor a Loomis resident (or residents) who embodies the vision of a world where older adults lead active, engaged, and inspired lives. Due to the pandemic, its first presentation was delayed until June of 2022.*

Jeanne Achille, Randy Hyvonen, and John Schechter are all current Loomis Village residents, having moved here in 2018, 2015, and 2019, respectively.

Much of their time at The Loomis Communities to date has been closely intertwined as many of their interests and pursuits have bound them together. First to refurbish the woodshop, then to create an art studio,

and eventually offering classes (Zoomed during the pandemic), creating raised garden beds, Medicine Wheel benches, stands for beehives, picture frames, refurbished tools, recycled and donated materials, and so much more. Residents were encouraged and excited to venture up the hill to see what all the fuss was about!

Beyond their work together, Jeanne remains active with monthly Medicine Wheel ceremonies in season, and as chair of the Program and Events Committee. Randy spent his early days at Loomis Village involved with governance, first as VP and eventually President of the Resident Association. John notes that with a minister and rabbi in the trio, not surprisingly there is much talk among them



# The Elvira Whiting Ball Award for Outstanding Service to Older Adults

## 2023 Honoree - Elissa Sherman

Elissa Sherman has been President of LeadingAge Massachusetts since 2000 and has worked in aging policy for over 30 years. She began her career in state government as an analyst for the Massachusetts state legislature's Joint Committee on Human Services and Elderly Affairs and later working at the Commonwealth's Executive Office of Elder Affairs. She joined LeadingAge Massachusetts (then called MassAging) in 1998 as Director of Public Policy and has overseen the Association's public policy and government relations work since that time.

As an association exclusively representing not-for-profit providers of aging services in Massachusetts, the mission of LeadingAge Massachusetts is to expand the world of possibilities for aging. During her current tenure, Dr. Sherman has brought the voice of not-for-profit aging service providers to the development of state policy through her work leading the Association's advocacy activities, and through her involvement on numerous state advisory boards.

In addition to working with the Association's Board of Trustees and directing the activities of LeadingAge Massachusetts, she is active in numerous work groups and coalitions aimed at enhancing options for housing and services for older adults in Massachusetts and is a frequent speaker on aging services.

Elissa's advocacy work in the industry has been critical to The Loomis Communities and other non-profit, mission-based, senior living organizations. She constantly asks the question: "How can we do it better?" Even more, Elissa's leadership and hard work during the pandemic was inspiring and energizing. She brought our communities together, advocated on all of our behalf for crucial resources, and provided much-needed guidance and moral support during those most difficult times. Simply put, Elissa has led our industry with a passion for serving older adults, and for making all of our lives better and more meaningful in this important work.

Elissa lives in Newton, MA with her husband Adam, their daughter and college sophomore Marley, and their son, and recent college grad, Alex.

We are so deeply grateful for both her leadership and friendship, and so proud to honor her with the 2023 *Elvira Whiting Ball Award*.



*John, Jeanne, and Randy*

related to religion, family, and politics. He confesses that "we even share some special religious language for when things go awry!"

Through their individual and collective efforts they have encouraged many fellow residents to explore and participate in activities focused around art, woodworking, other crafts, spiritual wellness, being active, attending events, and more. They have literally built and "opened doors" to new spaces and opportunities thanks to conceiving and implementing initiatives that come to life at Loomis Village and for the Loomis Communities. It is for all these efforts, for who they are and who they help us to be, and more, that Jeanne, Randy, and John were presented with the 2023 *Awards for Inspirational Aging*.

## Prior recipient:

2022 Helen Kidess

# New Loomis Program Innovations...



## Assisted Living with a Focus on Cognitive Health

Introducing the OpenView Program at Loomis

At Loomis, it's our belief that everyone deserves a safe and nurturing environment that offers the freedom to define their own experiences. That's why we are happy to introduce OpenView, a specialty program designed to support cognitive health, eliminate barriers, and replace them with personal discovery and growth.

Participants receive specialized support while also enjoying the opportunity to safely take advantage of the full range of activities and amenities offered throughout our communities. Residents take pride in living in an inclusive atmosphere, where everyone – regardless of ability – is open and encouraged to embrace a lifestyle in which their well-being is always prioritized.



[loomiscommunities.org](http://loomiscommunities.org)

### PARTICIPANTS IN THE OPENVIEW PROGRAM RECEIVE:

Specialized cognitive health assistance uniquely individualized for each participant

The opportunity to participate in SAIDO Learning, a non-pharmacological program based on a learning intervention

Access to facilities, programs, events and experiences available throughout The Loomis Communities

Peace of mind knowing every resident is secure and their safety is monitored by a combination of specially trained staff and technology

All the assistance with activities of daily living you will find within our award-winning Assisted Living communities

# Opening Doors...Coming to Yours!



## A Legacy of Caring Comes Home

For over a century, The Loomis Communities have operated with one goal in mind: providing adults with the support needed to live their lives to the fullest.

This guiding principle serves as the foundation of everything we do, from independent and assisted living to skilled nursing and – one of our newest offerings – private home care services.

Loomis At Your Door takes the same exceptional quality, care and respect you've come to expect from one of the Pioneer Valley's most trusted nonprofit organizations and brings it directly to your front door.

Whatever your needs may be – big or small – our highly trained professionals are here to make sure they are met with excellence, dignity and compassion.



[loomiscommunities.org](http://loomiscommunities.org)

LOOMIS AT YOUR DOOR IS HERE TO SUPPORT YOU EVERY STEP OF THE WAY WITH SERVICES SUCH AS:

- Companionship
- Personal Care Assistance
- Errand Services
- Healthy Living Support
- Housekeeping
- Laundry
- Long-Term Care Insurance Claim Assistance
- Meal Preparation
- Medication Management & Care Coordination
- Medication Reminders
- Organization Assistance
- Pet Care
- Transportation
- Cognitive Health Support

# Community Outreach

With the goal of having The Loomis Communities' residents and team members be a more active and integral part of life in the Pioneer Valley, the Community Outreach Committee (COC) is delighted to report the following successful and impactful activities in support of non-profit organizations and charitable efforts across the region in 2023.

The following initiatives and/or organizations were among those supported by either the time, talents, or treasure of the many residents, team members, families, and friends of the Loomis communities:

- **Amherst Survival Center**
- **Center for EcoTechnology** (EcoBuilding Bargains)
- Cooley Dickinson Hospital Childbirth Center
- Christmas Toy Collections
- Friends of South Hadley Seniors / South Hadley Council on Aging
- Mitten and Sock Drives to support local schools and churches
- **Pioneer Valley Walk to End Alzheimer's**
- **Ronald McDonald House**
- **Salvation Army**
- South Hadley and Granby food bank, **Neighbors Helping Neighbors**
- Springfield Pharmacy Toy Drive
- **Springfield Rescue Mission**
- **St. Jude's Ranch**
- **YMCA of Western Massachusetts**

## Committee Members:

### Residents

Betsy Belden, Maggie Horn, Esta Pekow, Rachel Tierney

### Team Members

John Anz, Hilary Loftus, Brenda Mendoza, Renee Charbonneau



*The Easter Bunny and Springfield's Mayor Sarno at Loomis Lakeside at Reeds Landing's community Easter Egg Hunt*



*A small assortment of hand-knit baby items ready for delivery to Cooley Dickinson Hospital*



*Applewood knitters and John Anz visit and tour the Cooley Dickinson Childbirth Center*



*The Loomis Communities Team at the Pioneer Valley Walk to End Alzheimer's*

# Philanthropy Report

Fulfilling the mission and vision of The Loomis Communities is only possible thanks to the loyal support and growing generosity of its many donors across a wide range of constituencies. Without the philanthropic contributions derived from hundreds of individual gifts, we could not provide the services, care, programs, and the many opportunities to engage inside and outside our communities which our residents and their families need and deserve.

In 2023, we were blessed with the good fortune of continuing improvements in the health climate, another wonderful, successful, and well-attended Spring Reception in May, and greater advocacy for and response to our Annual Appeal than the year before.

Thank you to everyone listed on the following pages whose care and commitment to our future is so deeply appreciated, and for making The Loomis Communities a priority of your charitable giving.

Annual Giving	\$ 134,908
Memorial and Honoree Giving	\$ 2,430
Spring Reception	\$ 47,185
Special Projects *	\$ 3,299
Other Restricted Giving **	\$ 5,500

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**TOTAL CHARITABLE GIFTS**      **\$ 193,322**

- \* Special Projects  
LLRL Craft Fair
- \*\* Other Restricted Giving  
LLRL Nursing Center

## The Loomis Communities supporters include:

- 100% of Board Members
- 100% of Senior Leadership and 8 Team Members
- 42% of Applewood Residents
- 59% of Loomis Lakeside at Reeds Landing Residents
- 51% of Loomis Village Residents
- 41 Businesses and Corporate Donors
- 56 Family Members and Friends



Honoree Elissa Sherman (center) and family at Spring Reception



Loomis Village Resident Lynne Tabor and new Board member Pat Crutchfield all smiles at Spring Reception

# Spring Reception

Spring Reception 2023 was held on Thursday, May 25th and returned to Loomis Lakeside at Reeds Landing for the first time since 2019. Wonderful food, fellowship, music, and award presentations highlighted the event which raised critical monies for environmental sustainability initiatives across all three Loomis communities.

Thank you to our 2023 Spring Reception Sponsors and Donors for their generous spirit and support.

## Business Sponsors

### Benefactors ~ \$5,000 +

Mountain View Landscapes and Lawncare  
PeoplesBank

### Sustainers ~ \$2,500 - \$4,999

Baystate Health  
Chase, Clarke, Stewart & Fontana/  
Goss & McLain Insurance  
Smith Brothers  
Sodexo Seniors  
Tsomides Associates

### Patrons ~ \$1,000 - \$2,499

Andrew Associates  
Atlantic Charter Insurance  
Belmont Laundry  
Lyon & Fitzpatrick  
Specialized Construction

### Gold ~ \$500 - \$999

Aladco Linen Service  
B-G Mechanical Service  
CBIZ | MHM  
Health New England  
Holyoke Millwork  
Mercier Carpet Service  
Northern Tree Service  
Paul Robbins Associates  
PIP Marketing, Signs, Print  
Richco Janitor Service  
Springfield Electrical Co  
Westfield Bank

### Silver ~ \$250 - \$499

Adam Quenneville Roofing & Siding  
Altus Dental  
Braman Termite & Pest Elimination  
Forastiere Smith Funeral Home  
Geriatric Medical  
Hackworth Systems  
Liquor Town  
Miracle Method of Western Mass  
Perkins Eastman

### Bronze ~ Up to \$249

Cheryl Fitzgerald  
Darcy Company  
Lee Audio 'N Security  
T. J. Conway Company

## Individual Donors

Jeanne Achille  
Sandy and Betsy Belden  
Laura Berzofsky  
Don Bliss  
Judy Boehlert  
Dee and Marty Conway  
Roberta Crowell  
Honore and Donald David  
Mary Falk  
Lynne Forbes  
Wayne and Marilyn Gass  
Daphne Hall  
Teresa Harris  
Maggie Horn  
Margaret Horsnell  
Randy and Karen Hyvonen  
Pamela Jones  
Carol Katz  
Sue LaMastro  
Win and Peg Lavallee  
Gail Markley  
Angelo Mazzocco  
Edith McEvoy  
Ann McIntosh  
Sally Motzer  
Jerry and Nancy Myers  
JoAnne O'Neil  
Eleanor Parke  
Anthony Pellegrino  
John and Emily Pietras  
Lilian Randall  
Michelle Rice  
Janet Roper  
Felix Salzano  
Lois Schwab

Don Sibley  
Enid Sichel  
Marty Spencer  
Mary-Anne Stearns  
Joan Steiger  
Shirley Steiner  
Trudi Temple  
Rachel Tierney  
Beverly Weeks  
Ann Weickert  
The Rev. Elizabeth Wheeler  
Sarah White  
Anne Wing  
Marjorie Wood  
Ron and Maureen Ziemba



# Founders Society & WSLLS

**The Founders Society** was created and named in 2005 to honor the Holyoke women – *the Rain or Shine Club* – who sparked a movement in the community to offer stable and comfortable housing for older adults. Members of the Founders Society have named The Loomis Communities as beneficiary of a generous planned gift. Such gifts might include a bequest, charitable deferred gift vehicle, partial or full entrance fee refund designation, gift of life insurance, or other similar commitment.



## Founders Society

ANONYMOUS  
Dorothy (and Joseph) Gavin  
Arthur (and Elizabeth) Gionti  
Beverly (and Robert) Henneman  
Eleanor Parke

Felix Salzano  
Art (and Barbara) Stanley  
Alex and Barbara Stetynski  
Patricia (and Robert) Webler

## Founders Society Legacy Members

ANONYMOUS  
Henry Allen and Edith Perman-Allen  
Phebe Amsden  
Harold and Ruth Bailey  
Christine Balch  
Edward Bayon  
Albert Berkowitz  
Diana Bliss  
Priscilla Carter  
Jack Clarke  
Carol Craig  
Barbara Curtis  
Frank Fowler  
Ralph Fowler  
Timothy Fowler  
Horace and Eloise Fuller  
Ilva Funke  
Sonja Goodwin  
Theodore Green  
Mahat Guest  
Joan Hafey

Elizabeth Haig  
Willard and Elizabeth Hale  
Vonnie Hayes  
Charles Johnson  
Louise Kennedy  
Alice Koenigsburg  
Nancy Ladd  
Ward and Katherine Lambert  
Otto and Helen Landgraf  
Mary Kay Landon  
William Lieson  
Reggie Ludwig  
Mary Lynch  
Margaret Maloney  
Robert Markarian  
Richard Martin  
Louise Merritt  
Jeanne, Mary, and Rebecca Murdoch  
Maril O'Malley  
Ken and Kathleen Padelford  
Samuel Potsubay

Arlottie Potts  
Arthur Rankin  
Richard and Jean Read  
Marion Ruggles  
Norma Sampson  
Elwin Sanborn  
Barbara Sheldon  
Robert Smith  
Walter and Phyllis Smith  
Clio Stearns  
Johanna Susat  
Thomas Tamblyn  
Caroline Turtle  
Ellen Tuttle  
Elizabeth Waring  
Hans and Edith Wayne  
L. Albert and Barbara Webb  
Dorothy Wheat  
Muriel Wilson  
Elizabeth Ryan Wolfe



The **William S. Loomis Leadership Society** recognizes those individuals who contribute annually at a leadership level of \$1,000 or more. They are recognized and celebrated accordingly in the Honor Roll of Contributors on the following pages, and receive benefits similar to, and reciprocal with, Founders Society members above for their generosity.

# Honor Roll of Contributors

## William S. Loomis Leadership Societies

### Visionary (\$10,000 and above)

Lorraine and Tony Lachowetz

### Benefactor (\$5,000 - \$9,999)

ANONYMOUS

Michael and Linda Costello

J. Kristin Hedges

Marc and Diana Meiches

Mountain View Landscapes

Valerie Parsegian

PeoplesBank <sup>20</sup>

### Sustainer (\$2,500 - \$4,999)

ANONYMOUS

John and Elizabeth Armstrong <sup>5</sup>

Baystate Health

Sanford and Elizabeth Belden <sup>5</sup>

Chase, Clarke, Stewart & Fontana/  
Goss & McLain Insurance Agency <sup>20</sup>

Smith Brothers Insurance

Sodexo Seniors

Andrea Weisberg

Tsomides Associates

### Patron (\$1,000 - \$2,499)

ANONYMOUS

Andrew Associates

Atlantic Charter Insurance

Belmont Laundry

John and Mary Bisbee

James Bralla

Deborah Buckley

Eugenia Burn

Seunghee Cha and Anthony Bishop <sup>5</sup>

Peter and Marlene Connor <sup>5</sup>

Fletcher and Elizabeth Davis

Ruth Eleris

Stephen and Judith Ellenburg

Edith Fabos

Sally Fenix

Robert and Barbara Franzini

Arthur Gionti <sup>15</sup>

Bernyce Grant

Stephen and Daphne Hall

Maggie Horn <sup>5</sup>

Vard Johnson and Ruth Purtilo

Jan and Bob Keefe

Assunta LaMastro

Sara Lawrence <sup>10</sup>

Todd Lee and Karen Dalton

LLRL Craft Fair

Loomis Lakeside at Reeds Landing Fund

Lyon & Fitzpatrick

Ann Mann <sup>10</sup>

Margaret Mantoni <sup>20</sup>

Edith McEvoy

Stephen Michaels

Jerome and Nancy Myers <sup>10</sup>

Eloise Nickerson

Ellen Pashall

Janet Potash

Donald Poulin

Janet Roper <sup>10</sup>

Lois Schwab <sup>5</sup>

Specialized Construction

Philip and Nancy Standel

Joan Steiger

Meridith Weiderman

Richard and Theresa Weston

Sarah White

James and Helen Wick

John and Nancy Wilson

Anne Wing

## Annual Fund Giving Clubs

### Gold (\$500 - \$999)

ANONYMOUS (4)

Aladco Linen Services

John and Brenna Anz

Roger and Glenna Ball

Ruth Barney

Roger and Susan Beer

Carolyn Bentley

B-G Mechanical Service

Robert and Jane Boilard

CBIZ | MHM

Albert and Janet Chevan

Helen Cohn

The Wealth Transition Collective

Claudia Considine

P. Martin and Dianne Conway

Susan Corcoran and Joshua Sanes

Stephen and Maureen Corrigan <sup>5</sup>

Brian Craven

D.J. St. Germain Company

Judith Fiorentino

Elliott Fortescue <sup>5</sup>

Linda Gordon <sup>5</sup>

Janet Hale

Health New England

Toni Hendrix <sup>5</sup>

Holyoke Millwork and Lumber Co.

Margaret Horsnell

Sheila Klem

Robert and Constance Law

Gail Markley

Mercier's Carpet Service

Lenore Miller

Sally Motzer <sup>5</sup>

Northern Tree Service

Paul Robbins Associates

Richco Janitor Service

Clara Rodrigues

Dorothy Rosenthal

Deborah Snow

Michiko and Reynold Spector

Springfield Electrical Co.

Mary-Anne and John Stearns

Shirley Steiner

Gennifer Sussman

Rachel Tierney <sup>5</sup>

Mark and Lori Todd

Janet and Graeme Veitch

Westfield Bank

Gordon and Mary Wyse

### Silver (\$250 - \$499)

ANONYMOUS (5)

Adam Quenneville Roofing & Siding

Altus Dental Insurance Company

Josephine Bellew

William Bixby

Braman Termite & Pest Elimination

Albert and Mary Breton

Robert Bucknell

Michelle Buglio

Forastiere Family Funeral & Cremation

Eugenie Garman

Wayne and Marilyn Gass

Geriatric Medical

Gene and Joan Golowich

Hackworth Systems

Teresa Harris

Mr. & Mrs. David Healey

Ann Heropoulos

Whiting and Helene Houston

Randall and Karen Hyvonen <sup>5</sup>

Claire James

Albert Kalmbach

Yvonne Karamali

Carol Katz

Helen Kidess <sup>10</sup>

Liquor Town

William J. and Kathleen Woods Masalski

Mary Jo Maydew <sup>10</sup>

Angelo Mazzocco

Ann McNeal

Miracle Method of Western Mass.

Thomas and Elaine Mitchell

Helene Opocensky

Maureen O'Toole <sup>5</sup>

Eleanor Parke <sup>10</sup>



# Thank you for your generous financial support of The Loomis Communities in 2023!

Esta Pekow **5**  
Perkins Eastman  
Robert Perkins **5**  
Lilian Randall  
Eileen Santer **5**  
Charlotte and John Schechter  
Elissa Sherman  
Marcia Spencer  
Christine Sulborski  
Alice Swift  
Lynne Tabor and Dorett "Pinky" Hope  
Gertrud Temple  
Stephen Wall  
Nancy Young  
Roger Zimmerman

## Bronze (\$100 - \$249)

ANONYMOUS (8)  
Jeanne Achille  
Douglas Adler  
Carol Albano  
Jane Allan  
Frances Bancroft  
Ann Beardsley  
Laura Berzofsky  
Barbara Blank  
Donald Bliss  
Ron Blume  
Jessica Bodon  
Judy Boehlert  
Phyllis Boilard  
Mary Boulais  
Anna Boulden  
Kathleen Bowler **5**  
Paul and Elizabeth Breen  
Richard Cezarek  
Winifred Chapman  
Yvonne Cherry  
Joanne Cioch  
Casey Clark **5**  
Rona Conrad  
Sylvia Cook  
Susan Cramer  
Roberta Crowell **5**  
Daniel Dain  
*The Darcy Company*  
Jerilyn Doherty  
Donald Donihue  
Alan Eccleston and Linda Harris  
Nancy Eddy  
Mary Falk  
Marion Fischetti **5**  
Lorna Fitch  
Cheryl-Lynn Fitzgerald  
Matthew Giroux **10**  
Phyllis Gracki  
Norman and Marion Halpern  
Jeffrey Hayden

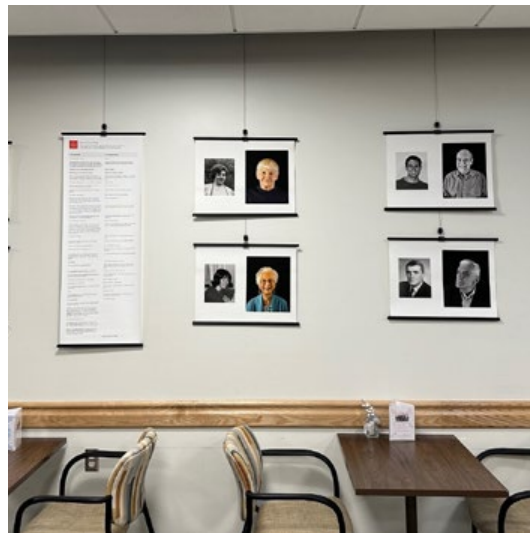
Beth Healy  
Harold J. Henry, Jr (Jack)  
Beatrice Kaplan  
Erik and Diane Kjeldsen  
Kenneth and Laura Koenigs  
Paul and Cynthia Lambert  
Kristen Lamoureux  
Yechiael Lander  
Winston and Margaret Lavalley **5**  
*Lee Audio'N Security*  
Jacqueline Lee  
Lorraine Lis  
David Longworth and Jo-Ann Davis  
Curtis and Janet Mandeville  
Arthur and Elaine Mange  
April Mastrangelo  
Jennifer Maxwell  
Michael and Sherry Maxwell  
Ann McIntosh **10**  
Barbara Murphy **10**  
Katherine Naughton  
Joanne Omang and David Burnham  
Pamela and Russell Omer  
Anthony Pellegrino  
John and Emily Pietras  
Leland and Sylvia Pollock  
Ann and Ken Powell  
Thomas Pratt  
Reeds Landing Resident's Association  
Michelle Rice  
Clifford Ridley and Elizabeth Hansell  
Carol Roberts  
Kristin Ronan  
Felix Salzano **10**  
Peter and Suzanne Sanborn  
Satya Sastry  
Roger and Patricia Schifferli **5**  
Donald and Anna Sibley  
Elizabeth Silver  
Katherine Sordillo  
Rita Starzyk and Drew Darnell  
Sylvia Staub  
Margaret Stevens  
Linda Summers  
*T. J. Conway Company*  
Holly Taylor and Jim Mitchell  
Michael Thorpe  
Margaret Trase  
George and Anne Valli  
Patricia Varney  
Ann Weickert **10**  
Wesley Weidemann and Judith Donovan  
Elizabeth Wheeler  
William and Laurie White  
John Wollensak  
Marian Wright  
Patricia Wright  
Ronald and Maureen Ziemba

## Friends (Up to \$99)

ANONYMOUS (3)  
Sandra Albertson-Shea  
Sandra Barbeau  
Virginia Brewer  
Carol and Richard Constant **15**  
Michale Conway  
Sandra Costello  
Patricia Crutchfield  
Andrew and Victoria Cusimano  
Scott and Anne Daniels  
Donald and Honore David  
Francis and Janice DeToma  
Julie Dwight  
Luis Escobar  
Jay and Tina Ferri **5**  
Lynne Forbes **10**  
Barbara Hamann  
Anne Hazzard  
Pamela Jones  
Hilary Loftus  
LLRL Lunch Bunch  
Leonard Melnick  
*Meyers Brothers Kalicka, P.C.*  
Lynne and Bob Norton  
JoAnne O'Neil **5**  
Ruth Owen Jones  
Edward and Dorothy Perrella  
Stanley and Susan Polansky  
Josh Powers  
Robert Robertson  
Enid Sichel  
Gladys Starks **5**  
Leonard and Ellen Von Flatern  
Beverly Weeks  
Marjorie Wood  
Angela Wright  
Shirley Zimmerman

## Gifts In Kind

Patricia Crutchfield  
Rhoda Honigberg Estate  
Carol and James Johnston  
Ann McIntosh  
Randall Prescott  
Michelle Rice  
Kit and Ray Sawyer  
Deborah Snow  
David and Diana Spahn  
Christine Sulborski  
The Sznajderman Family  
Haskell Thomson  
Priscilla Whalen



# Gifts in Memory and Honor

## Gifts in Memory of...

**Richard Bentley**

*Carolyn Bentley*

**Vesta Bisbee**

*John and Mary Lou Bisbee*

**Diana Bliss**

*Donald Bliss*

**Lucille Breen**

*Paul and Elizabeth Breen*

**William Considine**

*Claudia Considine*

**Dorothy Dempsey**

*Ann McIntosh*

**Nicholas Fiorentino**

*Judith Fiorentino*

**Frank Fischetti**

*Marion Fischetti*

**Jane Frizzell**

*Jane Allan*

**Teresa Harris**

*Janet Roper*

*Wesley Weidemann and Judith Donovan*

**Sonja Henry**

*Harold J Henry, Jr. (Jack)*

**Rhoda S. Honigberg**

*Rhoda Honigberg Estate*

**Barbara Houlihan**

*Elizabeth Silver*

*Daniel Dain*

*Jennifer Maxwell*

*Lynne Norton*

*Michael and Sherry Maxwell*

*Michelle Buglio*

*Sandra Costello*

*Michale Gordon Conway*

**Mary Kalmbach**

*Leonard and Ellen Von Flatern*

**Bashir Karamali**

*Yvonne Karamali*

**Lorraine Lachowetz**

*Meyers Brothers Kalicka, P.C.*

**Elizabeth Lambert**

*Paul and Cynthia Lambert*

**Rita and Larry Longworth**

*David Longworth and Jo-Ann Davis*

**Rev. John H. Parke**

*Eleanor Parke*

**Adrian Parsegian**

*Valerie Parsegian*

**Robert A. and Jean F. Potash**

*Janet Potash*

**Carolyn Rasmusson Close**

*Marc and Diana Meiches*

**Ann Riker and Clarice Baker**

*Roberta Crowell*

**Elwin Sanborn**

*Peter and Suzanne Sanborn*

**Ruth Sandow**

*Ann Heropoulos*

**Owen Santer**

*Bob and Jan Keefe*

*Winston Lavallee*

**Marilyn Slitzky**

*Stanley and Susan Polansky*

*Andrew and Victoria Cusimano*

*Kenneth and Laura Koenigs*

*Luis E. Escobar, PC*

**Alvin Steiner**

*Shirley Steiner*

**Dr. Donald Sweerley**

*Edith McEvoy*

**Suzanne and Marius Sznajderman**

*The Sznajderman Family*

**Nelson Weiderman**

*Meridith Weiderman*

**Stuart Weisberg**

*Andrea Weisberg*

**Harry Wolfe**

*Scott and Anne Daniels*

**Charles Wright**

*Marian Wright*

**Vincent**

*April Mastrangelo*

## Gifts in Honor of...

**Gilda Balboni**

*William White*

**Peter Courtney**

*Robert and Jane Boilard*

*Phyllis Gracki*

**Val Ivy**

*Albert and Janet Chevan*

**Judith P. McKenzie and****Richard P. Wall**

*Stephen E. Wall*

**Elissa Sherman**

*Carol Katz*

**All Caregivers at Loomis**

*Thomas Pratt*

**Dining Room Wait Staff****at Applewood**

*Vard Johnson and Ruth Purtilo*

**Lower Villa Neighborhood****at Loomis Village**

*Rachel Tierney*

**Skilled Nursing Center Staff**

*Lorraine and Tony Lachowetz*



# Financial Report

## Loomis House, Inc., Loomis Communities, Inc., and Loomis Senior Living, Inc.

### Consolidated Balance Sheets

(as of December 31, 2023)

Assets	2023	2022
Current assets:		
Cash and cash equivalents	\$ 5,556,556	\$ 5,133,102
Accounts receivable - residents, net	1,204,465	850,044
Accounts receivable - other	1,121,607	974,620
Prepaid expenses and other assets	427,280	416,7201
<b>Total current assets</b>	<b>8,309,908</b>	<b>7,374,486</b>
Assets limited as to use	15,077,497	15,925,484
Escrow receivable	-	150,000
Investments	38,398,666	33,335,571
Property and equipment, net	49,433,004	46,195,096
Right-of-use asset, operating lease	1,409,206	1,407,946
Beneficial interest in perpetual trusts	1,272,994	1,141,906
<b>Total assets</b>	<b>113,901,275</b>	<b>105,530,489</b>
<b>Liabilities and Net Assets</b>		
Current liabilities:		
Accounts payable	\$ 1,239,194	\$ 1,301,487
Accrued expenses and other current liabilities	3,368,760	1,742,289
Current maturities of bonds and mortgage notes payable	1,353,992	557,397
Current portion of refundable entrance fees	9,227,338	8,632,054
<b>Total current liabilities</b>	<b>15,189,284</b>	<b>12,233,227</b>
Long-term liabilities:		
Bonds and mortgage notes payable, net of current maturities	20,474,712	21,850,082
Deferred gain on sale of property and equipment	-	150,000
Deferred entrance fees, net	15,701,865	13,813,251
Refundable deposits	1,273,150	762,450
Refundable entrance fees	52,769,574	54,505,005
Operating lease liability	1,661,009	1,663,900
Liability under charitable gift annuities	59,692	72,770
<b>Total long-term liabilities</b>	<b>91,940,002</b>	<b>92,817,458</b>
<b>Total liabilities</b>	<b>107,129,286</b>	<b>105,050,685</b>
Net Assets:		
Without donor restrictions	1,457,076	(4,456,321)
With donor restrictions	5,314,913	4,936,125
<b>Total net assets</b>	<b>6,771,989</b>	<b>479,804</b>
<b>Total liabilities and net assets</b>	<b>\$ 113,901,275</b>	<b>\$ 105,530,489</b>

The above is an excerpt from the Audited Consolidated Financial Statements. For more information about the Audited Consolidated Financial Statements, please contact Carly Cavanaugh at (413) 532-5325.

# The Loomis Communities Investments

(as of December 31, 2023)

<b>General Investments and Other Unrestricted funds</b> .....	<b>\$19,346,420</b>
<b>Board Designated Endowment</b> .....	<b>\$ 12,043,913</b>
Used according to the Endowment Spending Policy established by the Board of Directors.	
<b>Loomis House Proceeds Fund</b> .....	<b>\$ 2,787,972</b>
Restricted for the repayment of debt or the construction of certain health care facilities.	
<b>Barbara Sheldon Trust</b> .....	<b>\$ 2,264,739</b>
Principal restricted, the income is directed each year according to need, by the Board of Directors.	
<b>Other Designated Funds</b> .....	<b>\$ 1,667,577</b>
a. Horace and Eloise Fuller Friendship Fund-Principal restricted. Earnings are used to subsidize residents with financial need.	
b. Ellen Tuttle Friendship Fund-Principal restricted. Earnings are used to support residents with financial need at Loomis House and Loomis Village.	
c. Arthur Rankin Nursing Center Equipment Fund-Principal restricted. Earnings are used to purchase equipment at the Loomis House Nursing Center.	
d. Arthur Rankin Friendship Fund-Principal restricted. Earnings are used for The Loomis Communities Friendship Fund.	
<b>Arlottie Potts and Louise Merritt Endowment Funds</b> .....	<b>\$ 1,272,994</b>
Principal restricted, the income is directed each year, according to need, by the Board of Directors.	
<b>Wright Charities</b> .....	<b>\$ 1,837,319</b>
Principal restricted, four percent of this principal restricted fund is used to subsidize the fees for residents from Easthampton, Westhampton and Southamptton who otherwise could not afford to live at Loomis.	
<b>Applewood Funds</b>	
• Applewood Residents Assistance Funds .....	<b>\$ 90,713</b>
• Applewood General Fund .....	<b>\$ 128,627</b>
<b>Loomis Communities Friendship Funds</b> .....	<b>\$ 111,621</b>
Not principal restricted, available to support residents whose financial resources are not adequate to pay their regular fees.	
<b>Loomis Lakeside at Reeds Landing Philanthropic Fund</b> .....	<b>\$ 482,249</b>
Not principal restricted, available for staff scholarships, resident assistance funds and other purposes that will benefit the residents of Loomis Lakeside at Reeds Landing.	
<b>Loomis Lakeside at Reeds Landing Memorial Reserve Fund</b> .....	<b>\$ 498,323</b>
Not principal restricted, held at the Community Foundation of Western Massachusetts for the benefit of Loomis Lakeside at Reeds Landing.	
<b>Loomis Lakeside at Reeds Landing Fund</b> .....	<b>\$ 30,089</b>
Permanently endowed fund, held at the Community Foundation of Western Massachusetts for the benefit of Loomis Lakeside at Reeds Landing	

# Financial Performance

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	<u>2023</u>	<u>2022</u>
Total Operating Revenues without Donor Restrictions	27,702,480	28,112,473
Expenses:		
Salaries and Benefits	13,579,334	13,328,601
Supplies and Other	10,237,886	11,117,145
Depreciation and Amortization	3,879,265	3,881,751
Total Expenses	<u>27,696,485</u>	<u>28,327,497</u>
Operating Gain (Loss)	5,995	(215,024)
Non-Operating Revenues	6,286,190	(5,154,631)
Net Gain (Loss)	6,292,185	(5,369,655)
Days Cash on Hand	572	685
Reserve Ratio <b>(2)</b>	2.29	2.03
Debt Service Coverage Ratio <b>(3)</b>	3.53	4.62

## **NOTES:**

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(2) Reserve Ratio required under Bond Agreement is .30

(3) Debt Service Coverage Ratio required under Bond Agreement is 1.20

## Your support helps assure that The Loomis Communities:

- Provides innovative and engaging programs, activities, and opportunities for residents and team members to stay active and informed both inside and outside their communities.
- Remains financially strong and responsive to the many diverse needs of residents and families today, and in the future.
- All nursing center residents receive the same outstanding care regardless of their financial means.

### Gift Designation:

Your gift may be restricted for a particular purpose or community, or it may be unrestricted for use wherever the need is greatest.

**Gifts may be made to The Loomis Communities (Tax ID #: 04-2706070) by:**

#### Check:

Checks may be made payable to “The Loomis Communities” and mailed to: 246 N. Main Street, South Hadley, MA 01075.

#### Credit Card:

Online credit card gifts are accepted on our secure website at [www.loomiscommunities.org](http://www.loomiscommunities.org). Click on *Support* on the home page, and then *Make a Gift*.

#### Securities:

Gifts of appreciated stocks or bonds may be an ideal way to enhance your gift and reduce your own capital gains tax liabilities.

#### IRA Distributions:

For those age 70 and a half and older, direct distributions from your retirement accounts to The Loomis Communities may be another way to enhance your support while reducing your tax burden and fulfilling your required minimum distributions.

#### Bequests:

Becoming a member of the Founders Society, and naming The Loomis Communities as a beneficiary in your will is the simplest and easiest way to provide a lasting gift of support.

#### Entrance Fee Refund Designation or Annuity:

Any portion of a resident’s entrance fee refund can be designated as a planned gift to The Loomis Communities. Additionally, a charitable gift annuity can be created from a portion of a resident’s entrance fee refund as well, giving Founders Society members income for life utilizing an asset that would not otherwise be accessible for use.

## Do you need more information?

Please contact John Anz  
Director of Development and Community Engagement  
(413) 532-5325 or [janz@loomiscommunities.org](mailto:janz@loomiscommunities.org)





Corporate Offices  
246 N. Main Street  
South Hadley, MA 01075

[www.loomiscommunities.org](http://www.loomiscommunities.org)

413-532-5325  
800-865-7655 Toll Free  
413-322-8504 Fax

