



**ReedsLanding**

*A member of The Loomis Communities*



**LoomisVillage**

*A member of The Loomis Communities*



**LoomisHouse**

*A member of The Loomis Communities*



**Applewood**

*A member of The Loomis Communities*

**ANNUAL REPORT 2010**

## *Our Mission*

To enrich the lives of seniors. We are fully accredited by CARF/CCAC as a Continuing Care Retirement Community and a Person-Centered Long Term Care Community.

## *Our Promise*

The Loomis Communities strategic plan encompasses these five focus areas:

### *Community Integration*

To integrate with the neighborhoods in which our communities are located.

### *Culture*

To foster a culture of excellence that creates a high quality environment for living and working.

### *Organizational Strength*

To grow our organization to meet the future needs of older adults in our changing environment.

### *Technology*

To incorporate technology as a tool to improve quality of life.

### *Wellness*

To embrace whole-person wellness as a way of life for our residents and employees.



**Loomis House** 298 Jarvis Avenue, Holyoke, MA 01040 413-538-7551  
**Reeds Landing** 807 Wilbraham Road, Springfield, MA 01109 413-782-1800  
**Applewood** One Spencer Drive, Amherst, MA 01002 413-253-9833  
**Loomis Village** 246 North Main Street, South Hadley, MA 01075 413-532-5325

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



*Applewood*

*Loomis House*



*For more than 100 years*, the Loomis Communities has provided lifestyle and healthcare options that enrich the lives of older adults. Now encompassing four communities, we have a long history of outstanding success in resident satisfaction, high quality health care, financial stability, uncompromising services and first-rate amenities. Being a non-profit organization allows the Loomis Communities to concentrate on what is most important, reinvesting all of our resources back into our residents, our employees, and our communities.



*Loomis Village*

*Reeds Landing*





## *A Report from the Chair of the Board*

### **2010-2011 Board of Directors & Officers**

#### **Board of Directors**

David Healey,  
Chairperson  
Kay Sordillo,  
Vice Chairperson  
Douglas Bowen  
Phyllis Capers  
Casey Clark  
Nancy Eddy  
Wayne Gass  
Norman Halpern  
Gwendolyn Jones Boisseau  
Robert Potash  
Venus Robinson  
Kenneth Seyffer  
Mary-Anne Stearns  
Joan Steiger  
Richard Whiting, Jr.

#### **Officers**

Carol C. Katz, President  
and Chief Executive  
Officer  
Margaret R. Mantoni,  
Treasurer and Chief  
Financial Officer  
Peter Connor, Clerk  
Margaret R. Mantoni,  
Assistant Clerk

Since joining the Loomis Communities Board in 2006, I have been captivated by the fact that continuing care retirement communities must maintain very high occupancy levels in order to achieve a positive financial margin. Our entire organization can be proud that because of our excellent reputation, four beautiful campuses, and much hard work by our management team, Loomis Communities continues to out-perform its peers.

While our organization has accomplished much, it is imperative that we remain focused on the challenges and opportunities facing Loomis in particular, and CCRCs in general. We must continue to grapple with the effect that the weak economy has had on today's generation of older adults, and we also must continue to make sure that all our communities have the resources they need to maintain high occupancy and the best quality of life and care. Additionally, we must look to the future. Shortly, our Board and management team will re-engage in our strategic planning process by learning from industry experts their outlook on the future of continuing care retirement communities, and the ways in which Loomis can change and adapt to remain successful.

The Board has been diligent in monitoring the results of operations and marketing of Reeds Landing, which was acquired in mid-2009. A new "dashboard" summary of operations was developed to give the Board a simple "tool" that provides clear and concise information to facilitate decision-making. Additionally, the Board has supported management and residents to assure a smooth transition and it has provided guidance to integrate Reeds Landing into the rest of our organization

Last summer, several other Board members, management and I attended a Board education session in Eastern Massachusetts, led by a Kennedy School of Government professor who presented ways for Boards to become more engaged, effective, and proactive. It is noteworthy that our Board already had adopted many of the strategies that were presented as characteristic of a high-performance Board.

I look forward with confidence to my last year as Chairperson working with our talented Board and management team and our residents to grapple with the myriad of issues that confront our organization and to make the appropriate decisions necessary to keep Loomis Communities successful.

David G. Healey, Chairperson



## **Senior Management Team**

Carol C. Katz  
President and Chief  
Executive Officer

Margaret R. Mantoni  
Treasurer and Chief  
Financial Officer

Karen Jackson  
Director of  
Operations

Susan Moore  
Director of Sales and  
Marketing

Nancy Azevedo  
Administrator at Reeds  
Landing

Robert Claflin  
Administrator at  
Applewood

Patrick Laskey  
Administrator at  
Loomis Village

Lori Todd  
Administrator at  
Loomis House

Carol Constant  
Director of  
Development

Barry Waite  
Director of Human  
Resources

## *A Report from the President & CEO*

Last year in this report, I wrote about our acquisition of Reeds Landing in mid-2009. During 2010 we have concentrated on integrating the operations and marketing of our four communities – overcoming the “growing pains” of suddenly going from three CCRCs to four, and adjusting to a larger market presence that now spans the whole length of the Pioneer Valley. Retirement communities have been challenged in this difficult economic climate, but we are successfully dealing with the challenge and remain strong operationally and financially.

The Loomis Communities continue to set ambitious goals – and to meet them – in our five key focus areas: Community Integration, Culture, Organizational Strength, Technology, and Wellness. We have recently completed a two-year grant to implement a coaching model of supervision and leadership; and have been selected for another grant to further advance the culture of our workplace. We have expanded our community outreach efforts and participate in partnerships with many area colleges, agencies, and programs. We have established Wi-Fi zones in all our communities, and are ahead of our peers in development of electronic medical records. We continue to focus on wellness for both staff and residents, and have creative and exciting initiatives for nutrition, weight loss, and fitness. The list goes on, and illustrates that we have completed another busy and productive year, with participation by an active Board, skilled and talented staff, and vibrant and wonderful residents.

Carol C. Katz, President and CEO

## Corporators

Irma Appel	Robert Fowler	Gwendolyn Morrissey	Mary-Anne Stearns *
Norma Bagnall	Marilyn Gass	James Morrissey	Allen Steiger
Ralph Blank	Wayne Gass *	Alice Mullins	Joan Steiger *
Barbara Blank	Gwendolyn Glass	Betsey Novinsky	Thomas Senecal
Anna Bowen	Lawrence Gonneville	John Novinsky	Mary Tuttle
Douglas Bowen *	Linda Gonneville	Louis Oldershaw	Rev. Robert Villani
Deborah Buckley	Norman Halpern *	John Osgood	L. Albert Webb
Michael Buckley	Jean Hazen	Mary Alice Osgood	Richard Wells
Carl Buschner	Robert Hazen	Sandra Parent	Peter Weston
Marjorie Buschner	Jane Hazen	John Pietras	Richard Whiting, Jr.*
Phyllis Capers *	Thomas Hazen	Elaine Pluta	Bruce Yarber
Dorothy Chase	David Healey *	Phyllis Pombal	Suzanne Yarber
Casey Clark *	Whiting Houston, Jr.	Robert Potash *	
Harry Craven	Betty Innocent	Samuel Potsubay, M.D.	
Catherine Craven	Gwendolyn Jones	Thomas Pratt	
Bruce Devlin	Boisseau *	Brandon Reed	* Board of Directors
Roma Donais	Mary Kates	Kathleen Rice	Corporators 2010
Ellen Donohue	Sara Lawrence *	Venus Robinson *	
Robert Donohue, M.D.	Barbara Lippman	Ruth Roddy	
Julie Dwight	James Mahoney, M.D.	Marie Rohan	
Lili Dwight	Joyce Mahoney	Manfred Rosenkranz	
Nancy Eddy *	Bettina Mayo	Carl Schmidt	
Janet Egelhofer	Peter McAvoy	Ruth Schmidt	
Aly Ezzat	Bruce McInnis	Kenneth Seyffer *	
Esmat Ezzat	Betsy McInnis	Lolita Seyffer	
Martha Fifield	Donald McLain	Alice Newton Smith	
Helene Florio	Diana Meiches	Kay Sordillo *	

## Boards and Committees

During 2010, members of Senior Management provided volunteer hours on these boards and committees:

Aids Foundation of Western Massachusetts; Cooley Dickinson Ethics and Ethics Education Committees, Children's Museum of Holyoke; Albert Schweitzer Foundation; Greater Holyoke Chamber of Commerce; Holyoke Mayor's Economic Development Advisory Council; Holyoke Rotary Club; Holyoke Visiting Nurse Association; Emergency Preparedness MassMap Region 1; Leading Age Conference and Education Committee; Leading Age of Massachusetts; Massachusetts Culture Change Coalition; Sage Western Mass – Service and Advocacy for Gay (LGBT) Elders; Sodexo Senior Services; South Hadley Public Schools Anti-Bullying Task Force; South Hadley Youth Commission; Town of West Springfield Capital Planning; United Way of Pioneer Valley; and Women in Philanthropy.



## *Philanthropy Report*

	2010	2009
Realized Planned Gifts and Bequests	\$ 33,313*	0
Annual Giving	63,284	57,035
Memorial and Honoree Giving	4,375	15,225
Special Projects	7,915	8,370
Spring Reception	37,754	33,310
Reeds Landing Foundation	14,525	11,135
Total Charitable Gifts	<u>\$ 156,485</u>	<u>\$ 113,940</u>

\*From the estates of Harold and Ruth Bailey, Ilva Funke and Elizabeth Ryan Wolfe

## *Founders Society*

Loomis Communities is especially grateful to the following people who, during their lifetimes, have named the Loomis Communities or the Reeds Landing Foundation as a beneficiary of their estate plans.

Edith Allen  
Diana Bliss  
Priscilla Carter  
Sonja Goodwin  
Jean (Vonnie) Hayes  
Charles Johnson  
Reggie Ludwig  
Elwin Sanborn  
Ruth and Carl Schmidt

Richard Martin  
Robert Smith  
Barbara and Arthur Stanley  
Barbara and Alex Stetynski  
Elizabeth Waring  
L. Albert Webb  
Patricia and Robert Webler  
Anonymous (11)

## *Endowment Gifts*

Gifts to the Endowment and Board Designated Funds enable Loomis Communities to be responsive to the needs of current and future residents. In 2010 Endowment Funds enabled Loomis Communities to make needed and important capital improvements, to support the ongoing operations of our campuses and to provide financial assistance to six residents.

## *Loomis Communities Supporters:*

100% Board Members  
100% Senior Management and  
21 Additional Staff Members  
80% Corporators  
28% Applewood Residents  
18% Loomis House Residents  
33% Loomis Village Residents  
34% Reeds Landing Residents  
67 Business and Corporate Donors  
124 Spring Reception Donors  
37 Family Members  
21 Other supporters



# *The Loomis Communities*

## *Honor Roll of Donors*

We gratefully  
acknowledge the  
many gifts we  
received in 2010  
and extend our  
sincere thanks to  
these friends:



### **SUSTAINING DONOR**

Polly Ehrgood  
Elizabeth Haig  
Elizabeth Odell

### **PATRON**

Edith Allen  
Anthony Farnham  
Bradley and Carol Katz  
Marc and Diana Meiches  
Tom and Terry Pratt  
Joan Steiger

### **PLATINUM**

Mary Abbey  
Sol and Miriam Berg  
Douglas and Anna Bowen  
Michael and Deborah  
Buckley  
Susan Corcoran  
and Joshua Sanes  
Mark and Karen Jackson  
Frederic and Susan  
Mackler  
Gerald and Cynthia Minton  
Elwin Sanborn

### **GOLD**

Gayanne Boyer  
Henry Burkhardt  
Casey Clark  
Peter and Marlene Connor  
Richard and Carol  
Constant  
Carol Craig  
Wayne and Marilyn Gass  
Arthur and Elizabeth Gionti  
Sonja Goodwin  
Thomas and Jane Hazen  
Phyllis Heronemus  
Charles Johnson

Audrey Kervick  
James and Joyce Mahoney  
Margaret Mantoni  
Susan Moore  
Alice Mullins  
Mark and Sandra Parent  
Robert and Jeanne Potash  
Caral Potvin  
and Denise Beaulieu  
Marilyn Power  
Thomas Senecal  
Kenneth and Lita Seyffer  
Alice Smith  
Robert Smith  
Stanley Smith  
and Sally Todd  
Alexander and Barbara  
Stetynski  
Herbert Torberg  
Bruce and Susan Yarber

### **SILVER**

Jean Anwyll  
Thomas and Helen Arana  
Albert Berkowitz  
Randall Betsher  
Kenneth and Shirley Brown  
Robert and Margaret Browne  
Lyle Butler  
Justine Caldwell  
Robert Clafin  
Robert and Ruth Cohen  
Lillian Cook  
Lilaina Daviau  
Nancy Eddy  
James Fleming  
Lawrence and Linda  
Gonneville  
Norman and Marion Halpern  
Wendy Jones Boisseau  
Patrick Laskey  
Sara Lawrence  
Curtis and Janet Mandeville  
Bruce and Betsy McInnis  
Donald Miner  
Alice Mullins  
Lou Oldershaw  
John and Mary Alice Osgood  
Helen Ratner

Jewel Reed  
Venus Robinson  
Ruth Roddy  
Peter and Suzanne  
Sanborn  
Eric and Dawn Seymour  
John and Mary Anne  
Stearns  
Allen and Barbara Steiger  
Christine Sulborski  
Gerda Wald  
Stephen Wall  
Elizabeth Waring  
Rick Whiting

### **BRONZE**

Estelle Abrams  
Dina Anderson  
Margaret Andrews  
Irma Appel  
Donald and Diana Bliss  
Lucille Breen  
Carl and Marjorie Buschner  
Raymond and Phyllis  
Capers  
Jacob Diamond  
Janet Egelhofer  
Aly and Esmat Ezzat  
Gwendolyn Glass  
Robert and Jane  
Harrington  
Jean Hayes  
Robert and Jean Hazen  
David and Marty Healey  
Robert and Louise  
Henneman  
William Hill  
Whiting and Helene  
Houston, Jr.  
Dorothy Hurtz  
Frederick Irving  
Mary Kates  
Arthur and Dorothy  
LaBerge  
Janet Lanier  
Clara Ludwig  
Doris Maloney  
Paula Marquis  
and Anna Smyke  
Daniel and Jackie  
McDonnell  
Donald McLain  
John Miller  
Jeanne Murphy  
Harriet Naughton  
Robyn Newhouse  
George and Nancy Nieske  
John and Eleanor Parke  
Brandon Reed  
Marie Rohan  
Helen Tarail  
Lori Todd

Mary Tuttle  
Alfred Walker  
John and Joanne Walker  
L. Albert Webb  
Joseph and Angela Wright

#### **SUPPORTERS**

Ronald Ancrum  
Nancy Azevedo  
Norma Bagnall  
Bruce and Darlene Balon  
Irene Balon  
Stanley and Cheryl Balon  
Peggy Barbour  
Immacolata Barnard  
Margaret Bates  
George and Ruth Beede  
Ralph and Barbara Blank  
Rick and Pat Blood  
David and Andrea Brennan  
Gerald and Joanne Brophy  
Linda Butler  
Jane Cameron  
Michael and Anne Cann  
Vincent Carver  
Margaret Cernak  
Joan Ciruti  
Marjorie Ciszewski  
William and Mary Compton  
Sharon Connor  
Raymond and Margarete  
D'Addario  
William and Jean Dickinson  
Emaline Diel  
Roma Donais  
Regina Drapala  
Ann Dunne  
Fleurette Dunne  
Julie Dwight  
Lili Dwight  
Conrad Eberhardt  
Joanne Fazio  
Irene Fic  
Paula Fick  
Wilson and Lynne Forbes  
Arnold and Susanne  
Friedmann  
Anna Frink  
Jean Fusini  
John and Paula Gallup  
Gregory and Frances  
Galica  
Eleanor Gibb  
John and Claudia  
Goiangos  
Albert & Linda Golfieri  
Joan Golowich  
Mary Greene  
Alice Grueling  
Mary Ann Guichard  
Alfred & Barbara Gurka

Charles Hapcook  
and Adele Steiger  
Audrey Heaphy  
Barbara Hendrickson  
Rhoda Honigberg  
Virginia Hopkins  
Theresa Howard  
John Howe  
Colette Iampietro  
Elizabeth Innocent  
Gae Isabelle  
Dale and Virginia Johnston  
Charlotte Katz  
Marjorie Kaufman  
Barbara Keith  
Beatricia Kelly  
Helen Kidess  
David Klekotka  
Helene Knightly  
Esther Kokoszka  
Lena Kropski  
Helen Ladd  
Lisa Laflamme  
Thelma Latour  
George and Chris Leary  
Madeline Lenz  
Lillian Leviton  
Amanda Linkenhoker  
Barbara Lippman  
Kenneth & Kathleen Longo  
Barbara Macon  
Joan Martel  
Margaret Mauldon  
Marya Mavilya  
Richard and Mary Maxey  
John McCormack  
Judith McKenzie  
Robert and Anna  
Merrington  
Mary Mingo  
Gene and Ruthann Mitchell  
Robert and Carol Moritko  
Verna Nash  
Gordon and Janice Nelson  
William Newell  
Larry and Lee Newlin  
Randolph and Joanne  
Newman  
Doris May O'Kane  
Patricia O'Reilly  
Vincent Palange  
Ingrid Pfohl  
John Pietras  
Phyllis Pombal  
Dorothy Pryor  
Kathleen Rice  
Jean Robbins  
Susan Root  
Lorraine Rosenberg  
Manfred and Janice  
Rosenkranz

Gladys Ruggles  
Marion Ruggles  
Peyton Rutledge  
Felix Salzano  
Keelee Schacht  
Diane Scheinost  
Jean Schenk  
Carl and Ruth Schmidt  
Valentyna Semyrog  
Cindi Sicard  
Margaret Smith  
Brian and Arlene Smith  
Robert and Shirley Smith  
Benedict and Hester  
Smith II  
Bonnie Soffan  
Katherine Sordillo  
Arthur and Barbara Stanley  
Peter and Margaret  
Ten Eyck  
Bruce and Sharon Theroux  
Joie Turgeon  
Harold and Jane  
VanderZwaag  
Jean Vivian  
Barry Waite  
Richard Wall  
Marilyn Walpole  
Richard and Betsy Whiting  
Donna Wojcik  
Joe Woznicki  
Mary Jean Wright  
Isabelle Wyman

#### **GIFTS IN KIND:**

Mary Abbey  
Theresa Lahey  
Susan Aldridge  
Carol McCarthy  
Estate of Sylvia Durfee  
John Miller  
Estate of Ilva Funke  
Jean Schenk  
Sarah Harms  
William Herrick  
Rhoda Honigberg

## **REEDS LANDING FOUNDATION - DONATIONS**

### *In Memory of:*

Christine Balch  
Evelyn Bary  
Aldoria and Fred Bliss  
Pierrette Bourke  
Edna Clarke  
Jane Davis  
Paul and Teresa Demontreux  
Henry Hayes  
Fred Johnson  
Helen Leary  
Veronica Leonard  
Almeda Lindstrom  
Raymond Montagna  
Mary and Hervey Parke  
Vera Peterson  
Elizabeth Schmidt  
Isabelle and Joseph Sojka  
Helen Witherspoon  
Lost Friends

### *Donors:*

Coughlins Place Inc.  
Christine Balch  
Myrtle Balogh  
Margaret Barbour  
Randall Betsher  
Donald and Diana Bliss  
Elaine Bowditch  
Carl and Mary Breyer  
David and Patricia Buckson  
Jacqueline Crowder  
Catherine Eckel  
Wilson and Lynn Forbes  
Eleanor Forrest  
Mary Stuart Hawk  
Jean (Vonnie) Hayes  
Dorothy Heffner  
William Hill  
Charles Johnson  
Audrey Kervick  
Helen Kidess  
Robert and Thelma Latour  
John Mann  
Richard Martin  
Marguerite Montagna  
Barbara Olmstead  
John and Eleanor Parke  
Dorothy Pryor  
John Drummond  
and Rommy Lopat  
Gladys Ruggles  
Marion Ruggles  
Jean Schenk  
Frances Smith  
Robert Smith  
Clio Stearns  
Jean Vivian  
Irene Wisnoski  
Florence Wolstencroft

Every effort has been made to assure the accuracy of this list.

To report any errors or omissions, please contact Carol Constant at 532-5325 x 184



*Elvira Whiting Ball  
1843-1915*

It was under the leadership of Mrs. Charles Ball, and out of the great concern that she had for those who needed a home with personal attention and care, that the original Home on Loomis Avenue took its form as an idea. It was her plan that, not through one great gift from a single individual, but with the small gifts from many people, this Home would be built, beautiful within and without, and dedicated to the comfort and happiness of men and women who would come to be its residents.

*The 2011 Honorees*  
*Elvira Whiting Ball Award for*  
*Outstanding Voluntarism to the*  
*Loomis Communities:*

*Jeanne and Robert Potash*



*Lita and Ken Seyffer*

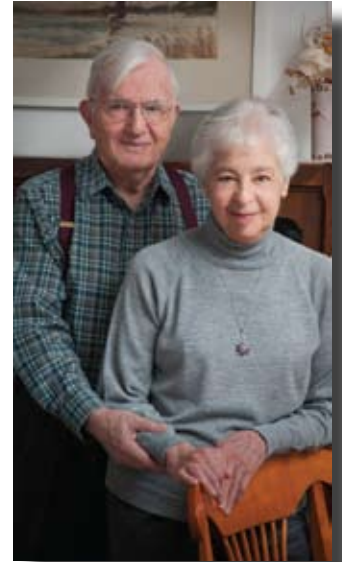
*Prior recipients:*

- 2002: Clarke S. Lyon
- 2003: 1981 Loomis Board of Directors
- 2004: Lawrence R. Gonneville
- 2005: Joan C. Steiger
- 2006: Gwen Glass
- 2007: Bruce Yarber
- 2008: The Founding Directors of Applewood at Amherst
- 2009: Esmat Ezzat
- 2010: Maria Burgee Dwight
- 2011: Jeanne and Robert Potash and Lita and Ken Seyffer

**The Loomis Communities Elvira Whiting Ball Award is presented to an individual or group who has advanced the mission of the Loomis Communities and personifies the spirit of our Founder Elvira Whiting Ball.**

*Jeanne Potash* tells anyone who asks that Applewood is a wonderful place to live. She claims that she and her husband have not regretted a moment of their decision to become residents. Jeanne explains that there is a special culture and sense of community at Applewood. Residents can choose to attend the many activities that are offered throughout the week or they can enjoy the quiet and privacy of their home.

What Jeanne neglects to mention is the work that she has done to create that outstanding community. Jeanne joined the Board of Directors of the Pioneer Valley Living Care Community (Applewood) in 1987, while the Board was planning its construction. Jeanne was a perfect choice to serve because she had worked for the Amherst Redevelopment Authority as the Relocation Specialist for an Urban Renewal project which involved senior housing. She rolled up her sleeves and made important suggestions for the construction of the building. Visitors and residents alike can thank Jeanne for the restrooms in the lobby, the display shelves outside each apartment, the ground level exit for the east elevator, and other small but important details that make life more pleasant at Applewood.



Jeanne continued to serve on the Applewood Board until 1991 when she and Bob placed their names on the wait list to move into Applewood. Once she became a resident, she picked up her volunteering again and has served on, and has chaired, the Resident Council, Country Store Committee, Activities Committee, and, with Bob, the annual Fourth of July celebration. She continues to organize the July 4th singers and kazoo players. Currently she serves as chair of the Resident Council Nominating Committee.

As a resident of Amherst since 1950, Jeanne has been a member of the Council on Aging, a Citizens Advisory Committee, a Jones Library Advisory Committee, and served many terms as an elected Town Meeting Member.

We are proud to honor Jeanne with the Elvira Ball Whiting Award.

The name of *Robert Potash* has been a household word in Argentina because of his best-selling books on contemporary Argentina. Bob is frequently consulted by the Argentine media at times of crisis. His professional life has been filled with teaching and research on Mexico and Argentina, chiefly at the University of Massachusetts, where he was a member of the History Department for thirty-six years. He initiated and directed the Undergraduate Certificate Program in Latin American Studies and also headed the University's Argentina Program. Bob also worked for the Department of State in Washington initially as a Foreign Service Reserve Officer then as a consultant. He is the author of ten books, including his most recent memoir, *Looking Back at My First Eighty Years*. He has received many honors including the Chancellor's Medal for Distinguished Service to the University of Massachusetts and election to the National Academy of History of both Argentina and Mexico.

Bob is being honored for what he has done for Loomis Communities and for Applewood. He has been an active volunteer at Applewood since becoming a resident in March 1997. He has been a cluster leader, served on the Residents Council, initiated the effort to equip the computer room at Applewood, served on the Funds Committee, and currently chairs the Financial Advisory Panel at Applewood. For the past eight years, Bob has also served on the Loomis Communities Board of Directors and is currently a member of its Governance Committee. Bob and Jeanne have played active roles in organizing or participating in the Annual Fourth of July Celebration at Applewood.

Thank you, Bob, for all you have done for Applewood and Loomis Communities.

*Lita Seyffer* has always been a consummate volunteer. She joined the Junior League of Evanston Illinois when she was 18, transferring next to the Junior League of Pittsfield, MA, and finally to the Junior League of Holyoke. She volunteered on the Holyoke Hospital Aid Auxiliary Association, the Executive Committee of the Holyoke Public Library and served as President of the Friends of the Holyoke Public Library. She also served as Girl Scout Leader for their four daughters.



But it was volunteering at Loomis House that gave her the most joy. As soon as she was asked to be on the Board of Directors of the original Loomis House on Loomis Avenue, not a day went by that she did not have the community in her thoughts. She admired the women with whom she served and the efficient and caring way they managed Loomis House. This all-women's organization maintained lovely traditions but was not afraid of changing to assure the very best quality of life for the residents of Loomis House.

Because Lita loved gardening, she volunteered to serve on the Buildings and Grounds Committee. For decades, it was Lita who assured that the spring and summer flowers were planted, watered and maintained and that the trees and shrubbery were healthy and pruned. However, serving on the Board was not all roses. Lita served on the Board throughout the planning and construction of Loomis House, the first Continuing Care Retirement Community in Massachusetts and also served on the Board of Loomis Village through the early 1990s during its construction. Lita believes in volunteering because volunteers can do remarkable things. Remarkable indeed! Clearly Loomis Communities has been the beneficiary of Lita's joy of volunteering and for that we honor her.

*Kenneth Seyffer* first came to Holyoke with his bride Lita when he took a position with the Hadley Falls Trust Company. Like so many who came to know Holyoke's "je ne sais quoi", Ken embraced the city and the city embraced him. Ken not only had a successful career in banking, he held leadership positions in the Holyoke Taxpayers Association, the Holyoke Rotary Club, the Western Mass. Credit Union, the Holyoke Economic Development Authority, the Holyoke Medical Center, the Holyoke Chamber of Commerce, the Holyoke YMCA, and the United Fund Campaign. Well deserved honors came as well, including Rotary Club's Paul Harris Award, the Oldershaw YMCA Award, the William G. Dwight Award and the Holyoke St. Patrick's Day Parade Citizenship Award. Ken still carries the shillelagh he used to march in the St. Patrick's Day parade in 1995!

Given Lita's long-term dedication to Loomis House, it was only natural that Ken and Lita would choose Loomis Village as their retirement home. Ken's vast experience serving on Boards in Holyoke and beyond made him a natural choice for the Loomis Communities Board of Directors and the Board Finance Committee.

Ken joined the Board in 2004. He and Bob Potash were the first two residents to serve on the Board. In this position, they understand the Loomis experience from a resident's point of view but are able to focus on the big picture and the overall good of each of the Loomis Communities. Thank you, Ken, for your volunteer leadership and support of the Loomis Communities.

We are proud to honor Ken with the Elvira Ball Whiting Award.

# Loomis Communities Gifts

## 2010 Gifts in memory of:

Raymond Andrews  
Martha Anwyll  
Christine Balch  
Donn Barton  
Dorothy Beale  
Bernice Becker  
Edith Berkowitz  
Margaret Bilz  
Aldoria Bliss  
Fred Bliss  
Pierrette Bourke  
Martha Brandfass  
Ruth Burkhardt  
Ruth Butler  
Mildred Cameron  
Edna Clarke  
Elisa Costa  
John Deputy  
Morris Dettman  
William Dillon  
Mary Dillon  
Ceil Dise  
Helen Eastwood  
Edith Ellington  
Anne Farnham  
Ilva Funke  
Pauline Fusile  
Linda Goodman  
Walter Goodwin  
Elizabeth Gross  
Helen Groszek  
Mary Hadley  
Elizabeth Haig  
William Hayden  
Henry Hayes

Charles Heaphy  
Gene Hurtz  
Dorothy Irving  
Dorothy Johnson  
Fred Johnson  
Gloria Klarfeld  
Solis Kates  
Robert Keith  
Catherine Lampron  
Malda LaRochelle  
Robert Latour  
Harold Leviton  
Almeda Lindstrom  
Robert Markarian  
Catherine Martel  
Elizabeth Martens  
Lucille McCabe  
Joan McCarthy  
Raymond Montagna  
John Mullins  
Loretta O'Neil  
Mary Parke  
Priscilla Parke  
Hervey Parke  
Douglas Parker  
Suzanne Parker  
Jennie Potasky

Elisabeth Pratt  
Albert Pryor  
Fayette Read  
Katherine Rice  
Evelyn Riley  
Ronald Roy  
Emma Scheinost  
Anna Scheinost  
Richard Schenk  
Carolyn Shearer  
John Sherley  
Richard Smith  
Joseph Sojka  
Isabelle Sojka  
Alexander Stetynski, Sr.  
Jean Swan  
Virginia Wakelin  
Oldershaw  
Marjorie Walker  
Barbara Webb  
Elizabeth Wilson

## 2010 Gifts in honor of:

Louise Caps  
Carol Katz  
Ruth Kidd  
Lorraine Laflamme  
Elizabeth McArthur  
Agnes O'Flaherty  
Jewel Reed  
Elwin Sanborn  
Joan Steiger  
Jeffrey Steiger  
Margaret Stroshine  
Lori Todd



*The 2011 Annual Spring Reception is an outstanding success. We're grateful to all who join us in saluting our honorees. The proceeds from this event will allow us to strengthen staff training in Person-Centered Care for our Nursing Centers at Loomis House and Reeds Landing.*

Event Sponsor



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**Donor Level Recognition**

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Browne  
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Elizabeth Gionti

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Jewel Reed  
Ruth Roddy  
Stella Rogers  
Elwin Sanborn  
Greg Sheehan  
Joan Steiger  
Angie & Joe Wright  
Sue & Bruce Yarber

**Friend Level Recognition**

Helen & Tom Arana  
Jim Armstrong  
Linda Butler  
Justine Caldwell  
Edna & Mert Couture  
Margarete D'Addario  
Nancy Eddy  
Janet Egelhofer

Gwen Glass  
Jaffa & Haim Gunner  
Bridget & Brent Hale  
Colly Jagger  
Charlotte Katz  
Marjorie Kaufman  
Helen Kidess  
Elizabeth Odell  
Edith Perman-Allen  
Jane Rausch  
Marie Rohan  
Mary Tuttle  
Marty Watson

**Thank you to those who  
made donations but were  
unable to attend:**

Norma Bagnell  
Peg Barbour  
Margarate Bates  
Gayanne Boyer  
Helene Knightly  
Reggie Ludwig  
Ann McIntosh  
Kay Monahan  
Eleanor Parke  
Gladys Ruggles  
Marion Ruggles  
Margaret Smith  
Alfred Walker

**Gifts In-Kind**

Aladco Linen  
Carey's Flowers  
Liquors 44

All donations listed as of  
May 18, 2011

## *Residence Governance*



### *Reeds Landing*

#### **Reeds Landing Residents Association Council**

L to R: Audrey Kervick,  
Jean Vivian,  
Don Bliss,  
Eleanor Parke,  
Carol Cassani,  
Randy Betsher

### *Loomis Village*

#### **Loomis Village Resident Association Executive Committee**

Front Row:

Happi Cramer, Bill  
Compton, Tom Arana,  
and Jean Johnson

Back Row: Jane Harrington,  
Muffy Handler, Edith Allen,  
Sonja Goodwin, Carl Krogh,  
and Chuck Viens



### *Applewood*

#### **Applewood Residents Association Council Officers**

L to R: Elizabeth Gionti,  
Gerry Brophy,  
Hal VanderZwaag,  
Drew Brown,  
Margola Freedman

### *Loomis House*

#### **Loomis Apartment Resident Association Executive Council**

L to R: Lyle Butler,  
Art LaBerge,  
Kay Monahan,  
Betty Reed,  
Jean Dickinson,  
Rosemary Nelson,  
and Glory Wheaton



*The Good Life at  
Loomis Communities!*



# 2010/2009 Financial REPORT

Loomis House, Inc., Loomis Communities, Inc., Loomis Senior Living, Inc.  
Pioneer Valley Living Care Center at Amherst, Inc., d/b/a Applewood, Wright Charities Corp.  
and Reeds Landing Foundation, Inc.

Consolidated Balance Sheets  
December 31, 2010 and 2009

<b>ASSETS</b>	<b>2010</b>	<b>2009</b>
<b>Current assets:</b>		
Cash and cash equivalents	\$ 4,158,044	\$ 5,025,542
Assets limited as to use - required for current liabilities (Note 3)	9,090	9,392
Accounts receivable - residents, net (Note 6)	1,801,686	1,440,797
Accounts receivable - other	43,513	174,609
Prepaid expenses	424,025	516,924
Total current assets	<u>6,436,358</u>	<u>7,167,264</u>
Assets limited as to use (Notes 3, 5 and 10)	<u>7,403,593</u>	<u>7,748,291</u>
Property and equipment, net (Notes 7 and 10)	<u>61,881,620</u>	<u>62,752,984</u>
<b>Other assets:</b>		
Investments (Notes 4 and 5)	10,830,001	9,247,081
Investments - board designated (Notes 4 and 5)	5,386,329	5,687,876
Beneficial interest in perpetual trusts (Note 5)	1,124,707	1,052,988
Deferred expenses, net of accumulated amortization (Note 8)	1,267,735	1,326,429
Total other assets	<u>18,608,772</u>	<u>17,314,374</u>
Total assets	<u>\$ 94,330,343</u>	<u>\$ 94,982,913</u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Current liabilities:</b>		
Accounts payable	\$ 719,701	\$ 771,001
Accrued expenses and other current liabilities	2,209,679	2,154,398
Current maturities of mortgage notes payable (Note 12)	193,245	167,223
Current maturities of bonds payable (Notes 2 and 10)	780,000	740,000
Current portion of deferred entrance fees (Note 9)	2,348,884	7,695,000
Deferred revenue	-	8,409
Total current liabilities	<u>6,251,509</u>	<u>11,536,031</u>
<b>Long-term liabilities:</b>		
Mortgage notes payable, net of current maturities (Note 12)	6,476,109	6,675,967
Bonds payable, net of current maturities (Notes 2 and 10)	21,335,000	22,115,000
Deferred entrance fees (Note 9)	56,116,698	51,989,242
Refundable deposits	271,650	284,355
Liability under charitable gift annuities (Notes 11)	178,941	172,583
Total long-term liabilities	<u>84,378,398</u>	<u>81,237,147</u>
Total liabilities	<u>90,629,907</u>	<u>92,773,178</u>
Commitments and contingencies (Notes 9, 11, 15 and 16)		
<b>Net assets:</b>		
Unrestricted (Note 19)	(328,606)	(1,612,236)
Temporarily restricted (Notes 13 and 14)	1,234,142	1,098,790
Permanently restricted (Notes 13 and 14)	2,794,900	2,723,181
Total net assets (deficit)	<u>3,700,436</u>	<u>2,209,735</u>
Total liabilities and net assets	<u>\$ 94,330,343</u>	<u>\$ 94,982,913</u>

See notes to consolidated financial statements.

## Financial Performance

	<u>2010</u>	<u>2009</u>
Total Operating Revenues	32,071,997	25,544,613
Expenses:		
Salaries and Benefits	16,470,865	13,315,444
Supplies and Other	10,366,145	8,668,825
Depreciation, Amortization, and Interest	4,911,858	4,369,683
Total Expenses	<u>31,709,147</u>	<u>26,353,952</u>
Operating Gain (Loss)	323,129	(809,339)
Non-Operating Revenues	1,167,572	3,683,847
Net Gain	1,490,701	2,874,508
Days Cash on Hand	269	249
Reserve Ratio (1)	0.64	0.73
Debt Service Coverage Ratio (2)	2.03	2.37

**NOTES:**

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

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

*Excerpts from the Audited Combined Financial Reports & Supplementary Information. For more information about the Audited Reports, please contact Marge Mantoni at (413)532-5325.*



## *Community Outreach*

**The Community Outreach Committee is delighted to report the following outreach activities of staff and residents in 2010:**

Valentine's Cookie Sales were held in conjunction with food drives at each of our campuses. The proceeds from the sales, together with a Loomis match, raised \$1,749.00 to benefit Kate's Kitchen in Holyoke, the Amherst Survival Center and the Open Pantry in Springfield. In addition, a total of 49 boxes of food were delivered to the three sites.

Daffodil sales raised \$1,580.00 to benefit the American Cancer Society.

Books and money with a value of \$990.00 were collected for the Hasbro Summer Learning Initiative Literacy Project.

Contributions, sponsorships, sales of forget-me-nots, bracelets, jewelry and raffles, together with a Loomis Match, raised \$7,176.00 for the Alzheimer's Association Memory Walk.



**2010  
Community  
Outreach  
Committee  
Members:**

Rob Clafin, Co-Chair  
Carol Constant, Co-Chair  
Louise Bevan-Cole  
Sharon Connor  
Jean Fusini  
Amanda Linkenhoker  
Jackie McDonnell  
Kelley Murphy  
Jessica Picard  
Elwin Sanborn

Twenty five residents and staff members wrapped packages two full days at the Holyoke Mall totaling \$874.00 for the Holyoke Hospice Life Care and VNA.

Loomis Communities contributed \$500.00 to the United Way of Pioneer Valley for fuel assistance for older adults and \$331.00.00 to the Food Bank of Western Massachusetts.

\$58.00 was raised by saving yogurt lids for the Susan G. Komen Race for a Cure.

**In Addition:**

Eleven talks open to the public on a wide array of topics of interest to older adults including physical wellness, financial strategies, grieving and sexuality.

Loomis' staff gave five talks at four Councils on Aging (Amherst, Holyoke, South Hadley and Hampden).

A blood drive was held at Loomis House for the American Red Cross.

Applewood held a volunteer day, donated 2 cases of coffee, and has an ongoing clothing drive for the Fisher Home for Hospice in Amherst.

Marketing sponsored these other non-profit organizations during the year: Alzheimer's Association, Amherst Chamber of Commerce, CISA, Family Outreach of Amherst, Holyoke Chamber of Commerce, Hampshire Choral Society, Holyoke Civic Symphony, Holyoke High School, Holyoke Hospice Life Care and V.N.A., Holyoke Medical Center, Holyoke YMCA, Old Post Orchestra, South Hadley Chorale, Springfield Public Forum, Springfield Symphony Orchestra, UMass Dept. of Music and Dance, and the UMass Fine Arts Center.

In all \$13,258.00 in cash, \$2,354.00 in donated materials and hundreds of countless volunteer hours of Loomis Communities' staff and residents were dedicated to support people and non-profit organizations of the Pioneer Valley.

## *Investments* (as of April 2011)

*General Investments* \$5,128,294

*Board Designated Endowment* \$5,523,457

The funds are used according to the Endowment Spending Policy established by the Board of Directors. Donors to this fund include: Phoebe Amsden, Edward Bayon, Jack Clark, Theodore Green, Nancy Ladd, William Lieson, Mary Lynch, Rebecca and Jean Murdoch, Maril O'Malley, Norma Sampson, Walter and Phyllis Smith, Jana Susat, Hans and Edith Wayne, Dorothy Wheat, and an anonymous donor.

*Barbara Sheldon Trust* \$1,247,124

Principal restricted. The income is directed each year, according to need, by the Board of Directors.

*Donor Restricted Funds* \$1,199,362

\* Horace and Eloise Fuller Friendship Fund- Principal restricted.

Earnings are used to subsidize residents with financial need.

\* Ellen Tuttle Friendship Funds-Principal restricted. Earnings are

used to support residents with financial need at Loomis House and Loomis Village.

• Arthur Rankin Nursing Center Equipment Fund – Principal restricted.

Earnings are used to purchase equipment for the Nursing Center.

• Arthur Rankin Friendship Fund, principal restricted. Earnings are used for the Loomis Communities Friendship Fund.

*Wright Charities* \$804,565

Four percent of this principal restricted fund is used to subsidize the fees for residents from the Easthampton, Westhampton, and Southampton who could otherwise not afford to live at Loomis House.

*Reeds Landing Foundation Investments* \$151,754

Not principal restricted.

*Loomis Communities Friendship Funds* \$187,313

Available to subsidize residents whose financial resources are not adequate for them to pay their regular fees. This fund is an accumulation of many small donations. Those who utilize these funds are asked to replenish the fund when they move out or receive their entrance fee refund.

*Arlottie Potts and Louise Merritt Funds* \$1,152,340

Principal restricted. The income is directed each year, according to need, by the Board of Directors.

*Reeds Landing Foundation* \$171,820

*Applewood Funds*—Not principal restricted, earnings remain within the fund.

Applewood Residents (Assistance) Funds \$49,160

Applewood General Fund \$61,324



*Your charitable gift* assures the continued vitality of the Loomis Communities by providing an ongoing flow of funds to the annual operating budget in support of everything we do. Your support helps:

- Bridge the gap between resident fees and the cost of providing high quality programs and activities,
- Provide financial assistance to residents who might not otherwise be able to afford to live at one of the Loomis Communities,
- Enable Loomis to invest its resources into programs and services regardless of shifts in the economy,
- Assure that Loomis Communities remain financially strong, affordable, and responsive to the needs of residents at each of our communities, Applewood, Loomis House, Loomis Village and Reeds Landing.

## *How can you give?*

### **Outright Gifts**

An outright gift in the form of cash or securities can be made for any purpose. You may designate a gift in support of current needs, through annual giving, or in support one of the endowments.

### **Gifts of Securities or Stock Securities**

Gifts of appreciated stocks or bonds are ideal if you wish reduce or eliminate capital gains tax. If the securities that you wish to give to Loomis Communities have decreased in value below their original cost, it may be better to sell the security and give the proceeds as your gift.

### **Gifts from your IRA**

The Charitable Rollover offers a golden opportunity to make tax-free gifts from your IRA or Roth IRA to the Loomis Community of your choice. Donor must be 70 ½ years of age or older on the date of the gift. Rollover gifts count toward mandatory withdrawal. Transfer of this outright gift must go directly from the IRA to Loomis Communities. Please contact your advisor or retirement plan administrator to initiate the transfer.

### **Bequests**

Naming the Loomis Communities as a beneficiary in your will is probably the simplest and easiest way to provide a lasting gift. Bequests can be made in a specific gift amount or as a percentage of an estate. In addition, you may indicate the way you wish your bequest to be used. Here is sample language: "I give (\$\_\_dollars or % of the residue of my estate) to the Board of Directors of Loomis Communities, a charitable corporation for the benefit of the Board Designated Endowment (or insert designation.)"

### **Charitable Gift Annuities**

A charitable gift annuity provides income for life when you transfer cash or securities and, in return, receive fixed payments and a charitable tax deduction for your gift. Charitable gift annuities of \$10,000 or greater can be created to benefit the community or purpose you prefer. Current annuity rates based on age are recommended by the Council on Gift Annuities and subject to change without notice. Here is a sample of single life annuity rates: 75-6.4%, 80-7.2%, 85-8.1%, 90+ 9.5%. These rates are effective April 30, 2011. For charitable deduction and payout information or for annuity rates for other ages or for two lives sample of benefits can be prepared for you.

### **Put Your Loomis Communities Entrance Fee Refund to Work!**

A charitable gift annuity created from a portion of your Loomis Communities entrance fee refund will give you income for life utilizing an asset that would not otherwise be accessible for your use. In addition, you will receive an immediate tax deduction and the great feeling that you will be supporting Loomis Communities today and in the future.

For more information, please contact the Director of Development 413-552-1505 x184 or [philanthropy@loomiscommunities.org](mailto:philanthropy@loomiscommunities.org).



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