The Loomis Communities
2016 Annual Report

The Western Massachusetts Pioneer in Senior Living
Mission
The mission of The Loomis Communities is to enrich the lives of older adults.

Vision
The vision of The Loomis Communities is to be recognized as the region’s premier provider of quality and innovative services for older adults.

Guiding Principles

Quality – We strive to provide the highest standard of services for older adults.

Integrity – We act with honesty and transparency in all that we do.

Dignity – We respect and support the uniqueness and autonomy of residents and staff, offering meaningful choices to each person.

Collaboration – We engage a diverse group of individuals and organizations to advance our mission.

Fiscal Prudence – We manage all of our resources in ways that provide for current needs while preserving and growing assets for the future.

Person-centered – We provide services for older adults based on values and practices in which they and those working with them are honored and respected.

Wellness – We provide opportunities for residents and employees to enjoy healthy living.

Leadership – We advance new ideas and new approaches to our work: doing the best today; better tomorrow.

Sustainability – We commit to responsible stewardship of the natural resources entrusted to our care.

Cover photo: Ruth Sandow with Jessie.
Photos L-R: Janice Morrissette, Don Donihue with Alexander, Spring Reception buffet, Holly Schroeder. Below: Judy Ruderman and Dorothy Gavin.
Photos clockwise from top left: Betsy Strohman, Jim Bralla, Margaret Mazziotti, Yechiael and Rose Lander.
For over 110 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 four distinctive retirement communities that embrace and reflect the mission and guiding principles that have successfully guided it from the beginning.

The Loomis Communities offer 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 care levels should be needed. All four communities are fully accredited by CARF/CCAC, so you can be assured our programs and care 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 House
298 Jarvis Avenue, Holyoke, MA 01040
413-538-7551
Casual living and a welcoming community make Loomis House a wonderful place to call home. Offering independent living apartments, assisted living, a skilled nursing center and care for those with Alzheimer’s disease and other memory related concerns on a cozy campus, Loomis House is perfect for couples who may have different care needs.

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 medical offices with primary care physician services 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 onsite events, nearby Mount Holyoke College offers many cultural and educational opportunities.
Clockwise from top left: Loomis Village team members hard at work, Carolyn Snyder and Charlie Johnson, Helen Cohn, Gail Markley and Betty Kelsey.
The Loomis Communities’ mission is straightforward: To enrich the lives of older adults. How we fulfill that mission is anything but straightforward. Each of Loomis’ four retirement communities has a personality of its own that is a reflection of its residents’ interests, values and dreams. Working with four unique community personalities adds a level of complexity to what sounds like a straightforward mission.

But we thrive on complexity. In fact, we invite it because of what we believe about people. For decades, Loomis has been at the forefront of progressive organizations serving older adults because of our commitment to treating people with dignity. Dignity is one of our Guiding Principles: We respect and support the uniqueness and autonomy of residents and staff, offering meaningful choices to each person. Our four campuses serve over 600 residents. That’s over 600 unique personalities. We have a straightforward mission and a talent for honoring complex ideals.

One of the interesting facts about The Loomis Communities is that we employ about as many people as we serve on our four campuses. With 600 team members, Loomis is a large employer and a big business in the Pioneer Valley. Our Guiding Principle about Dignity mentions respecting and supporting team members in the same breath as it mentions residents. Providing meaningful choices to 600 team members with unique personalities is complex, but it is what we choose to do because of what we believe.

In our day-to-day work at Loomis, we don’t often think of ourselves as a “big business.” We tend think of our work as too personal to be a big business. Ask a Loomis team member what is important about his or her work, and you are likely to get a personal story describing an unexpected special connection with an individual resident. It is unlikely that the story will be complex – just one person sharing life with another person.

That is the wonder of what we do at The Loomis Communities. We invite complexity because of what we believe about people. We are a big business. But our mission is straightforward, and our joy and success comes one person at a time.

Thomas R. Pratt  
David W. Scruggs
With the goal of having The Loomis Communities residents and staff an integral part of life in the Pioneer Valley, the Community Outreach Committee is delighted to report the following activities in support of people and non-profit organizations in 2016.

- Valentine’s cookie sales were held in conjunction with food drives that raised $2,421 and 912 pounds of food for area food pantries: the Amherst Survival Center, Margaret’s Pantry, Holyoke, Neighbors Helping Neighbors, South Hadley, and Open Pantry in Springfield.
- Contributions, a wine tasting, blueberry muffins, candy, cookies, hot dog lunches, and quilt raffle raised $7,633 for the Alzheimer’s Association Memory Walk.
- Events, raffles and payroll contributions brought $2,793 to the United Way of Pioneer Valley.
- The Five College Learning in Retirement and Springfield Learning in Later Life held courses at three of our communities during the year.
- The Springfield Women’s Club, Springfield Photo Club, the Garden Club of Amherst, Friends of the Orchard Arboretum, Upper Orchard and Hampshire Village Associations, Hampshire College, Amherst Shade & Tree Initiative, the League of Women Voters, and University of Massachusetts held meetings at our communities during the year.
- Partnerships with area colleges for student learning include the University of Massachusetts, Springfield College, Springfield Technical Community College, Holyoke Community College, Greenfield Community College, American Red Cross and Pioneer Valley CNA students.

- 31 talks and performances at our communities were open to the public for free.
- 282 pairs of new socks were collected and contributed to Highland Valley Elder Services and the Holyoke Soldier’s Home.
- Twenty units of blood were collected at the Loomis House blood drive for the American Red Cross.
- Used chairs were donated to the United Congregational Church, Holyoke.
- Applewood residents stuffed packets and mailings for Amherst Survival Center.
- Loomis Village residents knitted 128 hats for area children, 64 blankets for premature babies, and 31 lap robes for older adults.
- Hundreds of pounds of gently used clothing, blankets and household items were donated to Amherst’s Bangs Community Center, Amherst Survival Center, Cooley Dickinson Hospital, Goodwill Industries, and Hospice Shop of the Hospice Fisher Home, League of Women Voters, Providence Ministries for the Needy, and The Salvation Army.
- Residents and staff members wrapped gifts at the Holyoke Mall for a full day to benefit the Holyoke Hospice Life Care and VNA.
- Loomis House residents made 294 peanut butter and jelly sandwiches on two school vacation days for Kate’s Kitchen.
Community Outreach 2016

The Dementia Friendly Communities Coalition initiative continued in South Hadley and was launched in Holyoke in partnership with Councils on Aging, fire, police and town departments, the Alzheimer’s Association and WestMass Eldercare, UMass College of Nursing, River Valley Counseling Center, Holyoke VNA and Hospice, Soldier’s Home at Holyoke, State Representative Aaron Vega, Center Church, St. Peter’s Lutheran Church, Bethlehem Baptist Church, St. Patrick’s Church and other area faith communities. The project was co-sponsored by O’Connell Care at Home, PeoplesBank and The Loomis Communities.

In addition, The Loomis Communities Marketing Department provided $35,000 in sponsorships for numerous events offered by cultural and nonprofit organizations in the region:

- Alzheimer’s Association, St. Patrick’s Day Parade Committee, Senior Games, South Hadley Chorale, South Hadley Council on Aging, Springfield Public Forum, Springfield Symphony Orchestra, UMass Fine Arts Center, UMass Sports, and Young at Heart Chorus.

In all, over $50,000 in cash and hundreds of volunteer hours by The Loomis Communities’ staff and residents are dedicated to supporting people and non-profit organizations in the Pioneer Valley and beyond!

Committee Members:

Residents
Betty Odell (Loomis Village), Charlotte Rockland (Applewood), Elwin Sanborn (Loomis Village), Rachel Tierney (Loomis Village)

Staff
Louise Bevan-Cole, Tina Ferri, Norman Grandbois, Jill Jensen, Kelley Murphy, and Christine Westerholm

Community Outreach Committee Co-Chairs
Rob Claflin and Carol Constant
Photos clockwise from top left: JoAnne O’Neill and Marion Ruggles, Nancy Rogers with Princess, Easter buffet, Ruth Sandow and Gladys Ruggles, Pat McMahon, Joyce Currier and Ray Taylor.
A Feather In Her Hat
By Angelique J. Boulanger

As Loomis Village prepares to celebrate its 25th Anniversary in 2017, resident Helene Pin shared the story of her feather hat and the pheasants that roamed on the former Pin Christmas Tree farm where Loomis Village now stands.

Helene Pin was sitting on the porch swing with her father-in-law, Leo Pin, in South Hadley, MA, when he suggested that she and her husband Paul move from their apartment in Holyoke, Mass., and build a home on his North Main Street farm – a location that now boasts Loomis Village Retirement Community.

This was in 1965 and eight years after Helene and Paul’s wedding. Excited for the perfect setting to start a family they accepted Leo’s generous offer. They built a quaint ranch home and eventually added two daughters to the mix, Denise and Louise.

The land was fertile, but not interested in becoming a traditional farmer, Leo asked Helene and Paul to travel to Maine and pick up 3,000 pine tree saplings. This was the start of Pin Christmas Tree Farm which would become a popular spot for families in South Hadley for many years to come. When they weren’t selling trees and wreaths, the land was stocked with pheasant and a perfect spot for hunting.

Paul who enjoyed fishing and deer scouting decided to give pheasant hunting a try. By the end of the second day, he and their English Setter Duke came home with two pheasants. Seeing the pheasants up close for the first time, Helene was taken by the multicolored plumage; the tapered coppery tail, iridescent green head, crisp white ring around the neck, and contrasting patterns on the back and wings.

Helene, knowing ahead of time that Paul may bring home pheasant, had done her research on how to prepare the lean wild birds for dinner. However once the birds were in the oven, she could not bring herself to throw away the beautiful feathers. She decided to preserve the feathered skins with a salt brine and freeze them. It was during this process she was inspired to design and create a hat featuring the pheasant feathers.

As she had time she would take some out of the freezer to be plucked and stemmed. She began working in her dining room, but when Duke caught the scent of game bird still on those feathers he came running. Her organized piles where blown awhirl.

Over the years, Paul made a custom stand for her glue gun, built managers for her nativity scenes, and located molds for her ceramics projects. There wasn’t a single project that Helene undertook that Paul didn’t support and try to make easier for her. So it was no surprise that he built her a craft room downstairs complete with a large work surface, sink, and fridge. And with only limited access for a certain English Setter.

Having never crafted a hat before, Helene reached out to a local millinery in Holyoke for assistance. It was here that she selected the form and then worked with the milliner on the design possibilities. The hat Helene desired to create would require six pheasants. That would mean several hunting trips for Paul and several more pheasant dinners.

She started from the form up and when the main structure of her hat was complete it was time to apply the feathers. Due to the delicate nature and size of the feather pieces, and the intricate design she envisioned, she had to work with tweezers and lots of patience.

Two years and thousands of pheasant feathers later, Helene was perfectly versed in the art of fine hat making. And that showed with the end result: A unique cloche style hat whose side band is filled with alternating patterns of iridescent copper, auburn and black. A five-pointed star with a bold white outline stands out on the crown tip. The brim is wispy and soft, with light blues, greens and caramels.

Proud of her hard work Helene wore her one-of-a-kind chapeau to Easter Mass, where the compliments were abundant. She has received requests to create more hats, which she promptly turned down. And even an offer to display her hat in a prominent museum.

More than 50 years later, Helene and her hat are residents at Loomis Village – and she is still surrounded by the pines where the pheasants ran.
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 over 110 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, the first residents moved to the home on Loomis Avenue in Holyoke, beautiful within and out, dedicated to their comfort and happiness.

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

Prior Recipients

2002  Clarke S. Lyon
2003  1981 Loomis Board of Directors
2004  Lawrence R. Gonneville
2005  Joan C. Steiger
2006  Gwendolyn Glass
2007  Bruce A. Yarber
2008  Founding Directors of Applewood
2009  Esmat Ezzat
2010  Maria Burgee Dwight
2011  Jeanne and Robert Potash,
       Lita and Ken Seyffer
2012  Students of the Blessed Sacrament
       Intergenerational Program
2013  Thomas R. Pratt
2014  Kathy Bowler
2015  Founding Directors of Loomis Lakeside
       at Reed Landing
2016  Carol C. Katz
2017  Rachel E. Tierney
Rachel E. Tierney, PhD, RN, is a retired psychiatric-mental health clinical nurse specialist with over 35 years of clinical practice that included inpatient, partial, outpatient and consultation programs. She has spent a lifetime working primarily with adults with chronic and persistent mental illness. She is a three-time graduate of the University of Massachusetts Amherst, earning a BS in nursing, an MS in psychiatric-mental health nursing and a PhD in Public Health - Health Policy & Management.

Rachel has taught nursing education in baccalaureate and graduate degree programs, serves on the University of Massachusetts College of Nursing alumni board, and on the Dean’s Advisory Board. She also serves on the Chancellor’s Amherst Campus Council as a representative from the College of Nursing. In 2012 she was named a “Living Legend in Massachusetts Nursing” by the Massachusetts Association of Registered Nurses.

When her husband, Jim Tierney, was diagnosed with Alzheimer’s disease in 2001, being a caregiver became personal. Thanks to Rachel and the help of family and community resources, Jim was able to remain at home until June of 2009. After his death in 2010, Rachel began her volunteer work with the Alzheimer’s Association, becoming a member of the planning committee for the annual Pioneer Valley Walk to End Alzheimer’s, and helping to organize a Benefit Gala.

When she heard about the Dementia Friendly Communities movement, she recognized an opportunity to raise awareness and support for individuals and families living with a dementia diagnosis. Now a resident of Loomis Village, she mobilized The Loomis Communities Community Outreach Committee to involve the South Hadley and Holyoke Councils on Aging and Senior Centers, faith communities, business leaders, fire, and police, to organize a local Dementia Friendly Communities initiative. Thanks to her vision, leadership, and active participation, the group has held communication tips training for first responders, bank managers, faith communities and clubs. Many led by Rachel! As she puts it, “I like to stir the pot but I also stay around and help out.”

The Loomis Communities honors Rachel for her lifelong passion of caring for others including those living with mental illness, those living with dementia or Alzheimer’s Disease, and their caregivers. Her vision continues to spark and inspire.
Board of Directors and Officers
2016 - 2017

Board of Directors
Tom Pratt, Chairperson
Steve Corrigan, Vice Chairperson
Kathleen Bowler
Seunghee Cha
Fletcher Davis
Lisa Ekus
Norman Halpern
David Healey
Sara Lawrence
Winston Lalavalle
Ann McIntosh
Anthony Pellegrino
Venus Robinson
Greg Sheehan
Deborah Snow
Meghan Sullivan
Kenden White

Officers
David W. Scruggs, President and Chief Executive Officer
Margaret R. Mantoni, Treasurer and Chief Financial Officer
Peter Connor, Clerk
Margaret R. Mantoni, Assistant Clerk

Corporators
Norma Bagnall
Deborah Buckley
Carl Buschner
Marjorie Buschner
Casey Clark
Brian Craven
Catherine Craven
Harry Craven
Ellen Donohue
Robert Donohue
Julie Dwight
Lili Dwight
Nancy Eddy
Aly Ezzat

Photos from Left:
Loomis Lakeside at Reeds Landing Resident Association: seated Debbie Perry, Janet Roper, Ann McIntosh, Jo Joel, standing, Jack Henry, Peter Courtney, Ruth Sandow, Margaret Stevens.
Loomis House Resident Association: Seated Claire Larkiere, Art LaBerge Joyce Currier, standing, Joe McNerney, Holly Schroeder, Lorraine Gorham, Helen Czelusniak, missing, Bill Lyons and Marion Markwell.
Senior Leadership Team

David W. Scruggs – President and Chief Executive Officer
Margaret R. Mantoni – Treasurer and Chief Financial Officer
Karen Jackson – Chief Operating Officer
Robert Claflin – Executive Director, Applewood
Craig Johnsen – Executive Director, Loomis Lakeside at Reeds Landing
Patrick Laskey – Executive Director, Loomis Village
Lori Todd – Executive Director, Loomis House
Toni Hendrix – Director of Human Resources
Carol Constant – Director of Community Engagement
Patrick McCarthy – Area General Manager Food Services

Members of the Senior Leadership Team provided volunteer hours on boards and committees of the following organizations:

All Saints’ Episcopal Church Vestry
Art for the Soul Gallery
Commission on Accreditation of Rehabilitation Facilities/Continuing Care Accreditation Commission
Conway Festival of the Hills
Dementia Friendly Communities Coalition
Emergency Preparedness
MassMap Region 1
Trustees of the Episcopal Diocese of Western Massachusetts

Foundations of Health Advisory Board at Holyoke Community College
Greater Holyoke Chamber of Commerce and Foundation
Holyoke Community College Allied Health Committee
Holyoke Public Schools
Holyoke Rotary Club
Leadership Pioneer Valley
Massachusetts Culture Change Coalition
Massachusetts Senior Care Association Ambassador
Music and Arts South Hadley
United Church of Bernardston
United Way Pioneer Valley
West Springfield Capital Planning
Clockwise from top left: Ward Lambert and Bill Zimmer, Kay Monahan and Rose Jackson, Jeannette Russell and Helen Cohn, Anna and Don Sibley.
Philanthropy Report

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<th>2016</th>
<th>2015</th>
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<tr>
<td>Realized Planned Gifts and Bequests</td>
<td>$2,000**</td>
<td>124,177*</td>
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<td>Annual Giving</td>
<td>84,544</td>
<td>81,537</td>
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<td>Special Projects**</td>
<td>43,507</td>
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<td>Spring Reception</td>
<td>49,175</td>
<td>47,335</td>
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<td><strong>Total Charitable Gifts</strong></td>
<td><strong>187,422</strong></td>
<td><strong>295,686</strong></td>
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**Special Projects**

### 2016

**Applewood**
- Life Changes Wellness Initiative

**Loomis House**
- Resident Activities

**Loomis Lakeside at Reeds Landing**
- Concert Grand Piano, Craft Fair and Corner Store sales

**Loomis Village**
- Ginney Russell Memorial Garden, Library

### 2015

**Applewood**
- Low Vision Equipment and Mirror for Private Dining Room

**Loomis House**
- Staff Scholarship Fund and Nursing Center Building Project

**Loomis Lakeside at Reeds Landing**
- Craft Fair and Corner Store Sales

**Loomis Village**
- Ginney Russell Memorial Garden, Piano Repair, TV for exercise room

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**Loomis Communities Supporters Include**

- 95% of Board Members
- 100% of Senior Management and 11 Additional Staff Members
- 68% of Corporators
- 38% of Applewood Residents
- 22% of Loomis House Residents
- 46% of Loomis Village Residents
- 63% of Loomis Lakeside at Reeds Landing Residents

- 67 Business and Corporate Donors
- 166 Spring Reception Donors
- 142 Family Members and Friends

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**Endowment Funds**

Principal Restricted and Board Designated Endowment Funds helped The Loomis Communities do this important work in 2016:

- Bring financial assistance to four residents.
- Purchase a new van for Loomis Lakeside at Reeds Landing resident transportation.
- Replace the hallway carpets with beautiful wooden floors in the Loomis House Nursing Center.
- Renovations for the auditorium at Loomis Village.

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Bob and Bev Henneman
Top: Herb Kaplan, Miriam Berg, Dave Moran
Center: STCC shadow day, Top Chef competition, dancing at Applewood, Brad and Carol Katz
Bottom: Loomis House cookout, Applewood Fourth of July, John Blossom
Founders Society

Members of the Founders Society have named Loomis as beneficiary of a planned gift. Such gifts might include a bequest, charitable income gift, partial entrance fee refund designation, or gift of life insurance.

Founders Society

Diana Bliss
Priscilla Carter
Sonja Goodwin
Bob and Bev Henneman
Charles Johnson
Ward and Kit Lambert
John and Eleanor Parke
Felix Salzano
Elwin Sanborn
Robert Smith
Art and Barbara Stanley
Clio Stearns
Alex and Barbara Stetynski
Elizabeth Waring
Robert and Patricia Webler
ANONYMOUS (8)

Founders Society Legacy Members

Henry Allen and Edith Perman-Allen
Phoebe Amsden
Harold and Ruth Bailey
Christine Balch
Edward Bayon
Albert Berkowitz
Jack Clarke
Carol Craig
Don Elleman
Frank Fowler
Ralph Fowler
Timothy Fowler
Horace and Eloise Fuller
Ilyva Funke
Theodore Green
Mahat Guest
Joan Hafey Hafey
Elizabeth Haig
Willard and Elizabeth Hale
Jean “ Vonnie” Hayes
Louise Kennedy
Alice Koenigsburger
Nancy Ladd
Otto and Helen Landgraf
William Lieson
Clara “ 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
Norma Sampson
Barbara Sheldon
Walter and Phyllis Smith
Johanna Susat
Thomas Tamblyn
Caroline Turtle
Ellen Tuttle
Hans and Edith Wayne
L. Albert and Barbara Webb
Dorothy Wheat
Elizabeth Ryan Wolfe
<table>
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<th>Category</th>
<th>Name(s)</th>
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<tr>
<td>Benefactor $5,000+</td>
<td>John and Elizabeth Armstrong, Sol and Miriam Berg, Charles Johnson, Robert Russell</td>
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<td>Sustaining $2,500-$4,999</td>
<td>Helen Cohn, Joe Cohn, Estate of Ann Grose, Elizabeth Odell</td>
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<td>Patron $1,500-$2,499</td>
<td>Estate of Albert Berkowitz, Karen and Mark Jackson, Donald Poulin, David Scruggs, Joan Steiger</td>
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<td>Doris Bernardin, James and Martha Bralla, Carole Brown, David and Jill Brown, Peter and Marlene Connor, Susan Corcoran, Joshua Sanes, Fletcher and Elizabeth Davis, Arthur and Elizabeth Gionti, Thomas and Jane Hazen, Jack Henry, Muriel Kowlessar, Ann Mann, Laura May, Elizabeth Mayo, Jerome and Nancy Myers, Mary Catherine Phinney, Jeanette Russell, Elwin Sanborn, Philip and Nancy Standel, Ann Weickert, Shirley Zimmerman, Anonymous (1)</td>
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<td>Silver $250-$499</td>
<td>Felicia Barber, Samuel Belzito, Donald Bliss, Ron Blume, Shirley Brown, Seunghae Cha, Robert Catlin, Casey Clark, Pearl Claunch, Ursula Coleman, Stephen and Maureen Corrigan, Anne Cotton, Barbara Curtis, Liliana Daviau, Lois Dethier, Virginia Dunlap, Barbara Falvey, Jane Ferguson, Frank and Marion Fischetti, Lynne Forbes, Elliott Fortescue, Kristine Furkey, John and Paula Gallup, Sheila Goldlust and William Rota, Norman and Marion Halpern, Thomas and Jane Hazen, David and Marty Healey, Frederick Irving, Beverly Jackson, Herbert and Beatrice Kaplan, Vincent and Janice Lapiere, Linda Lariviére, Sara Lawrence, Madeleine Lenz, David and Jo-Ann Longworth, Ines Lull, Landis and Gail Markley, Mary Jo Maydew, Stephen Michaels, Barbara Murphy, George and Nancy Nieske, John and Eleanor Parke, Deborah Perry and Peter Courtney, Carol Potvin and Denise Beauieu, Venus Robinson, Charlotte Rockland, Nancy Rogers, Jean Ross, Donna Ross and Peter Straley, Peter and Suzanne Sanborn, Nancy Schenk, Jean Schenk, Kenneth and Lola Seyffer, Joseph Smith, Carolyn Spencer, John and Mary-Anne Stearns, Bonnie Stretch and Donald Casey, Elizabeth Strohman, Christine Sulborski, Kenneth and Mary Syriac, Lori and Mark Todd, Eugene Tulio, Jr., Richard and Jennifer Whiting, Jr., Paul Willer, Julia Winetrout, Conrad and Barbara Wogrin, Anonymous (5)</td>
</tr>
</tbody>
</table>

*Five or more years of continuous giving*
Honor Roll of Contributors in 2016

In recognition of supporters whose generosity in 2016 demonstrates a commitment to enriching the lives of older adults

John and Betsy Stevens
Marius and Suzanne Sznajderman
Raymond Taylor
Mark and Noreen Tolosky
Arnold and Elaine Trehub
John Walker *
Leonard and Flo Wilson
Joseph and Angela Wright ***
Anonymous (5)

Friend up to - $149
Thomas and Helen Arana *
Sandra Barbeau
Richard and Marita Bausman
Robert Beaudoin
Kenneth and Nancy Benard
Linda Benard
Barbara Bernard
Karen Bierwert and Joe Henefield
Steve and Barbara Bing
Vesta Bisbee *
Jean Blanchard
John Blossom
Thomas and Michele Boucher
Paul Boudreau
Wayne and Mary Boulaïs
Andrea Brennan *
Anne Cann **
George and Janet Cartier
Marilyn Cataldo
Donald Cheetham
Susan Cohen-Hellman and Peter Hellman
Sharlyn Cox
Lauren Crafts
Cynthia Cyran
Dorothy Dempsey *
Jeanne Denoncourt
Margaret Devot *
Sarah Doering
Ellie Dooley
Marc and Susan D’Orvilliers
Julie Dwight ***
Lili Dwight
Nancy Eddy ***
Lisa Ekus
Linda Emmons
Bernarda Erwin
Eileen Gosselin
Sandy Grant
Virginia Grenier
Kevin Griffith
Barbara Grover *
Jane Harrington *
Sheila Harrington
Teresa Harris
Waldo and Audrey Heinrichs
Suzanne Hendery
Herb and Janet Hodos
Norman and Chris Hoskeer
John Howe *
Randall and Karen Hyvonen
Claire James
Jo Anne Joel
Susan Jordan
David Judge
Edward and Louise Kane
John and Jean Kern
Mark Keroack
Lois Knight
Carol Kurzdziel
Anne Kusiak
Lisa Laffamme *
Norman LaGasse
Winston and Margaret Lavallee
Lolita Lawson
Diane Lessard
Thomas and Joan Lindeman
Catherine Livingston
Marion Markwell
Daniel and Beverly Martin
Wallace and Caryl Matusiewicz
Paul McDonald
Ann McIntosh *
Joe McNeary
Marlene Meinsen
Leonard Melnick
Marguerite Montagna
Susan Moore Dolton
Katherine Naughton
Janice Niver
Tanya Norris
Dorothy O’Connell
Lou Oldershaw ***
Robert Opdycke
JoAnne O’Neil
Patricia O’Reilly **
John and Mary Alice Osgood ***
Lori Parzych
Roger and Patricia Pennycook
Lowndes Peuple IV
Ed and Dorothy Perrella *
Diana Philayw
Sarah Popoli
Elizabeth Porada
Chris P’Simer and Clare Cooper
Marie-Anne Quenneville
John and Nancy Rapoport
Barbara Raschille
Thomas and Kathy Rice **
Mary Rider
Kathleen Riordan
Richard and Janet Robert
Dora Robinson
Manfred Rosenkranz **
Valerie Ross
Marion Ruggles *
Dorothy Saalfrank
Joseph and Cathy Ann Savarese
Marion Schmidt
Brent and Dianne Schmidt
Martin Schoenemann
Charlene Sedlak
Marjorie Sigda
Beverly Sigda
William Sims
Iving and Marilyn Slitzky
Edwin and Janice Smith
Kathleen Smith
Robert Smith *
Kay Sordillo **
Carolyn Spencer
Allen Steiger ***
Sandra Strauss
Elizabeth Strohman
Milton and Laurette Sutherland
Alan and Marilyn Tapper
Richard and Marge Thibodeau
Lillian Thomson
Jay Vivian
Barbara Walters
Frederick and Joan Wanat, Sr.
Robert and Patricia Webler
Kendred and Dianne White
Marion Williams
Clement and Mary Louise Wilson
Mary Windrum
Harry Wolfe
Margaret Woods
Anonymous (9)

Organizations
Chicopee Public Library Staff
Community Foundation of Western Mass.
Holyoke Caledonian Pipe Band
Loomis House Knitter Group
Loomis House Rehab Department
Loomis House Resident Association
O’Connell Professional Nurse Service
Pookookapog Lake Association
VanZelm Engineers

Gifts in Kind
Linda Benard
Betsy Bergen
Peter Courtney
Nancy Eddy
Dorothy Gavin
Estate of Ann Grose
Susan Jordon
Joyce Klekotka
Kristine Larsson
Joan Leavitt
Adrian Magrath
Barbara McGarrah
Susan Mertz Savteer
Linda Rogers
Robert Russell
Dorothy Saalfrank
Arnold Trehub

Every effort has been made to assure the accuracy of this list. Please report any errors or omissions to Carol Constant at 413-532-5325.
Giving records for Loomis Lakeside at Reeds Landing are unavailable prior to 2009.

**Ten or more years of continuous giving
***Fifteen or more years of continuous giving

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Thank you to our 2016 Spring Reception business sponsors and friends for their support!

Proceeds benefit the nursing centers at: Loomis House and Loomis Lakeside at Reeds Landing

BENEFACTOR
$5,000 +
Mountainview Landscapes and Lawncare
PeoplesBank

SUSTAINING
$2,500 - $4,999
Goss & McLain
O’Connell Care at Home

PATRON
$1,500 - $2,499
Lyon & Fitzpatrick
Retirement Dynamics
Smith Brothers Insurance Company
Springfield Electrical Company

PLATINUM
$1,000 - $1,499
Beers & Story
Funeral Homes
Easthampton Savings Bank
Holyoke Medical Center
Specialized Construction

GOLD
$500 - $999
Aladco, Inc.
Atlantic Charter Insurance
Bert Hill Moving and Storage
B-G Mechanical Service
CBIZ Tofias
Clearbrook Global Advisors
Complete Restoration Solutions
Forastiere Family Funeral Homes
Genesis Rehabilitation Services
Health New England
HJ Sims & Company
Holyoke Gas & Electric
Mackenzie Architects
Mercier Carpet
Paul Robbins Associates
Preferred Pharmacy Solutions
Securitas Security Services
Tighe & Bond

SILVER
$250 - $499
Altus Dental
American Rug
Associated Flooring
Burkhard, Pizzanelli, P.C.

Geriatric Medical & Supply
GMH Fence Company
Industrial Residential Security
Innovative Business Systems
Life Supply Corporation
Miracle Method of Western MA
Northern Tree Service
Pancione Painting
Summerlin Floors
The Standard
Whiting Oil Corporation
Whittlesey & Hadley, P.C.

BRONZE
$150 - $249
Adam Quenneville Roofing & Siding
Belmont Laundry
Braman Termite & Pest Elimination
Cebula Electronics Corporation
Chicopee Savings Bank
Clay and Associates
Messier, Brunelle Funeral Homes
North Beach Creative
Poehlman Electric
Reminder Publications
Sampson Family Chapels
T. J. Conway Company
UTCA Unemployment Tax Control
Viking Kitchen Cabinets

FRIENDS
$100 - $149
Wattsaver Lighting Products
Brodeur-Campbell Fence Company
Holyoke Credit Union
Lee Audio ‘N Security

Gifts made in memory of:
Carl Breyer, 2015 Honoree
Randolph Bromery, 2015 Honoree
Teressa Frappier
John Mann, 2015 Honoree

INDIVIDUAL DONOR LEVEL
Shirley Appy
Robert Cohen
Walter Dietz
John and Paula Gallup
Dorothy Gavin
Larry and Linda Gonneville
Barbara Grover
Janet Hale
Teresa Harris
Fred Irving
Jane Ferguson
Muriel Kowlessar
Sara Lawrence
Landis and Gail Markley
Patricia McMahon
Ann Mann
Deborah McCurdy
Louis Oldershaw
Robert and Jeanne Potash
Elwin Sanborn
William Sims
Joan Steiger
Paul Willer
Julia Winetrout
Angela and Joe Wright
Shirley Zimmerman

INDIVIDUAL FRIEND LEVEL
Shirley Brown
Shirley Carpenter
Casey Clark
Susan Cohen and Peter Hellman
Conrad Eberhardt
Nancy Eddy
Wayne and Marilyn Gass
Helen Gawron
Norman and Marion Halpern
Jane Harrington
David and Martha Healey
Charles Johnson
Helen Kidess
Ann Mann
Paul and Gail McDonald
Marguerite Montagna
George and Nancy Nieske
Mary Alice Osgood
Deborah Perry and Peter Courtney
John Pietras
Dora Robinson
Manfred Rosenkranz
Jeannette Russell
Ken and Lita Seyffer
Kay Sordillo
Allen and Barbara Steiger
Betsy Strohman
Arnold and Elaine Trehub

Thank you those who gave but could not attend:
Jean Anwyll
Lois Dethier
Barbara Falvey
Peter Hellman and Susan Cohen
Harold Henry
Herb and Janet Hodos
Randall and Karen Hyvonen
Joe McNerney
Dorothy O’Connell
Patricia O’Reilly
Judy Peloquin
Christine P’ Simer and Clare Cooper
Janet Roper
Alonzo and Claudine Sheffield
Rachel Tierney
Ann Weickert
Peggy Woods

IN-KIND SUPPORT
Aladco Linen Services
Carey’s Flowers
Liquors 44
Sodexo Senior Services

Thank you to our 2016 Spring Reception business sponsors and friends for their support!
Gifts in Memory and Honor

Gifts in Memory
Martha Anwyll
Jean Anwyll
Eric Bascom
Donald Bliss
Charlie Johnson
Patricia McMahon
Betsy Strohman
Robert Bergen
Betsy Bergen
Linda Butler
Elizabeth Odell
Ruth Byron
Charlie Johnson
Janice Niver
Robert Smith
Barbara Cinco
Charlie Johnson
Joan Maclver
Gloria Colton
Charlie Johnson
Rita Conway
Charlie Johnson
Marie Deitz
439 CS Westover ARB
Christine Bejune
Ken and Nancy Benard
Linda Benard
Jean Blanchard
Tom and Michele Boucher
Paul Boudreau
Chicopee Education Association
Cynthia Cyran
Walter Deitz
Jeanne Denoncourt
Ellie Dooley
Linda Emmons
Eileen Gosselin
Sandy Grant
Skip and Chris Hosker
Carol Kurdziel
Anne Kusiak
Diane Lessard
Dan and Beverly Martin
Wallace and Caryl Matusiewicz
Marlene Meisner
Tanya Norris
Lori Parzych
Diana Philyaw
Marie-Anne Quenneville
Barbara Rasehille
Mary Rider
Richard and Janet Robert
Dorothy Saafirank
Dianne Schmidt
Charlene Sedlak
Lorraine Shannon
Beverly Sigda
Marjorie Sigda
Milt and Laurette Sutherland
Rich and Marge Thibodeau
Fred and Joan Wanat
Mary Windrum
Alice Dickson
Odvard Dyrl
Elizabeth Dole
Marc and Susan D’Orvilliers
Sheila Harrington
Sarah Popoli
Ted Dunn
Charlie Johnson
Patricia McMahon
Conrad Eberhardt
Charlie Johnson
Anthony Florio
Charlie Johnson
Eleanor Forrest
Sharilyn Cox
Virginia Grenier
Charlie Johnson
John and Andy Parke
Kathleen Smith
Therese Frappier
Ken and Mary Syriac
Jessica Frosch
Thomas and Catherine Livingston
Eugene Garety
Dorothy Quick
David Giroux
David Scruggs
Gwen Glass
Larry and Linda Gonville
Mary Graham
Joyce Klekotka
Robert and Ann Grose
The Grose Family
Vonne Hayes
Charlie Johnson
Patricia McMahon
Jay Vivian
Jill Votesc
Annie Wallack
HeLEN Hedberg
Charlie Johnson
Patricia McMahon
Barbara Keith
Donald Bliss
Charlie Johnson
Betsy Strohman
John Kopec
Charlie Johnson
Stacia Kozak
Jeremiah and Fran Millane
Catherine Lampron
Tom and Kathy Rice
John Larson
Kristine Larson
Hank Lis
Charlie Johnson
Patricia McMahon
Rita Longworth
David Longworth
Doug Macmillan
David Scruggs
Hedwidge Magrath
Adrian Magrath
Michael McCurdy
Charlie Johnson
Vincent and Janice Lapierre
Patricia McMahon
Sally Montgomery
John and Nancy Rapoport
Joan Steiger
William Powers
Charlie Johnson
Betty Robinson
Charlie Johnson
Paul Ross
Karen Bierwert and Joe Henefield
Suzanne Hendery
Jane Harrington
Skip and Jean Kern
Mark Keroack
Donna Ross and Peter Straley
Jean Ross
Valerie Ross
Joe and Cathy
Ann Savarese
Sandra Strauss
Mark and Noreen Tolosky
William Rice
Fred Flaherty
Tom and Kathy Hammell
Kurt and Dorothy Hertzfeld
Catherine Lampron
Tom and Kathy Rice
Lloyd and Leola Richards
Dexter and Susan Silva
William and Christine Tebbetts
Scott and Lynn Thomson
Ginney Russell
Bob Russell
Edward Schenk
Donald Bliss
Charlie Johnson
Patricia McMahon
Betsy Strohman
Lolita Seyffer
Barbara Bernard
The Cataldo Family
Julie Dwight
Larry and Linda Gonville
Tom and Jane Hazen
Edward and Louise Kane
Lolita Lawson
George and Chris Leary
Robert Opdycke
Mary Alice Osgood
Roger and Patricia Pennycook
The W. Lowndes Peple Family
Martin Schoenemann
David Scruggs
Len and Flo Wilson
Angela and Joe Wright
Jeanne Senecal
David Scruggs
Clio Stearns
Charlie Johnson
Robert Weikert
John Blossom
Lauren Crafts
Dorothy Dempsey
Charlie Johnson
Ann McIntosh
Patricia McMahon
Janet Roper
Felix Salzano
Betsy Strohman
Roy and Dorothy Weikert
Andrew Weikert
Donald Bliss
George and Janet Cartier
Charlie Johnson
Patricia McMahon
Ann Weikert
Gifts in Honor
Norma Bagnall’s 100th Birthday
Larry and Linda Gonville
Karen Lachapelle
Karen and Mark Jackson
Claire Lariviere
Her Daughters
Kathryn Riordon
Kathleen Riordan
Jean Ross, Donna Ross and Peter Straley
Suzanne Hendery
Rose Trehub
Arnold Trehub
LOOMIS HOUSE, INC., LOOMIS COMMUNITIES, INC., AND LOOMIS SENIOR LIVING, INC.

Consolidated Balance Sheets

<table>
<thead>
<tr>
<th>Assets</th>
<th>December 31,</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2016</td>
</tr>
<tr>
<td>Current assets:</td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$6,157,608</td>
</tr>
<tr>
<td>Accounts receivable - residents, net</td>
<td>2,200,162</td>
</tr>
<tr>
<td>Accounts receivable - other</td>
<td>596,910</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>488,501</td>
</tr>
<tr>
<td><strong>Total current assets</strong></td>
<td><strong>9,443,181</strong></td>
</tr>
<tr>
<td>Assets limited as to use</td>
<td>4,171,897</td>
</tr>
<tr>
<td>Investments</td>
<td>22,150,481</td>
</tr>
<tr>
<td>Deferred expenses, net of accumulated amortization</td>
<td>217,670</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>55,336,638</td>
</tr>
<tr>
<td>Beneficial interest in perpetual trusts</td>
<td>1,078,074</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>92,397,986</strong></td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets**

<table>
<thead>
<tr>
<th>Liabilities and Net Assets</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current liabilities:</td>
<td></td>
</tr>
<tr>
<td>Accounts payable</td>
<td>$1,048,802</td>
</tr>
<tr>
<td>Accrued expenses and other current liabilities</td>
<td>2,042,219</td>
</tr>
<tr>
<td>Current maturities of mortgage notes payable</td>
<td>235,058</td>
</tr>
<tr>
<td>Current maturities of bonds payable</td>
<td>870,000</td>
</tr>
<tr>
<td>Current portion of refundable entrance fees</td>
<td>9,210,473</td>
</tr>
<tr>
<td><strong>Total current liabilities</strong></td>
<td><strong>13,406,552</strong></td>
</tr>
<tr>
<td>Long-term liabilities:</td>
<td></td>
</tr>
<tr>
<td>Mortgage notes payable, net of current maturities</td>
<td>3,255,737</td>
</tr>
<tr>
<td>Bonds payable, net of current maturities</td>
<td>19,648,168</td>
</tr>
<tr>
<td>Deferred entrance fees, net</td>
<td>5,553,821</td>
</tr>
<tr>
<td>Refundable deposits</td>
<td>484,750</td>
</tr>
<tr>
<td>Refundable entrance fees</td>
<td>58,948,928</td>
</tr>
<tr>
<td>Liability under charitable gift annuities</td>
<td>136,240</td>
</tr>
<tr>
<td><strong>Total long-term liabilities</strong></td>
<td><strong>88,027,644</strong></td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>101,434,196</strong></td>
</tr>
<tr>
<td>Net assets:</td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>(13,429,176)</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>1,587,519</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>2,805,447</td>
</tr>
<tr>
<td><strong>Total net deficit</strong></td>
<td><strong>(9,036,210)</strong></td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$92,397,986</strong></td>
</tr>
</tbody>
</table>

See accompanying notes to the consolidated financial statements.
## Financial Performance

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating Revenues</td>
<td>33,982,450</td>
<td>33,544,960</td>
</tr>
<tr>
<td>Expenses:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and Benefits</td>
<td>17,950,019</td>
<td>17,197,126</td>
</tr>
<tr>
<td>Supplies and Other</td>
<td>11,888,943</td>
<td>11,553,733</td>
</tr>
<tr>
<td>Depreciation, Amortization, and Interest</td>
<td>5,428,941</td>
<td>5,282,192</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>35,267,903</td>
<td>34,033,051</td>
</tr>
<tr>
<td>Operating Gain (Loss)</td>
<td>(1,285,453)</td>
<td>(488,091)</td>
</tr>
<tr>
<td>Non-Operating Revenues</td>
<td>1,515,509</td>
<td>(316,353)</td>
</tr>
<tr>
<td>Net Gain (Loss)</td>
<td>230,056</td>
<td>(804,444)</td>
</tr>
<tr>
<td>Days Cash on Hand</td>
<td>276</td>
<td>288</td>
</tr>
<tr>
<td>Reserve Ratio (1)</td>
<td>0.95</td>
<td>1.07</td>
</tr>
<tr>
<td>Debt Service Coverage Ratio (2)</td>
<td>3.15</td>
<td>1.97</td>
</tr>
</tbody>
</table>

**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.*
# The Loomis Communities Investments

## (as of December 31, 2016)

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Investments</td>
<td>$7,137,892</td>
</tr>
<tr>
<td>Board Designated Endowment</td>
<td>$7,199,634</td>
</tr>
<tr>
<td>Barbara Sheldon Trust</td>
<td>$1,531,848</td>
</tr>
<tr>
<td>Principal Restricted Funds</td>
<td>$1,532,990</td>
</tr>
<tr>
<td>Arlottie Potts and Louise Merritt Endowment Funds</td>
<td>$1,078,074</td>
</tr>
<tr>
<td>Wright Charities</td>
<td>$1,058,645</td>
</tr>
<tr>
<td>Applewood Funds</td>
<td>$54,714</td>
</tr>
<tr>
<td>Applewood General Fund</td>
<td>$55,063</td>
</tr>
<tr>
<td>Loomis Communities Friendship Funds</td>
<td>$42,878</td>
</tr>
<tr>
<td>Loomis Lakeside at Reeds Landing Philanthropic Fund</td>
<td>$295,517</td>
</tr>
<tr>
<td>Loomis Lakeside at Reeds Landing Memorial Reserve Fund</td>
<td>$318,853</td>
</tr>
</tbody>
</table>
Your support helps assure that The Loomis Communities:
Provides innovative programs and opportunities for residents and staff.
Remains financially strong and responsive to the needs of residents today and in the future.
All nursing home 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 where most needed.

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

Credit Card
Visa and MasterCard gifts are accepted on our secure website www.loomiscommunities.org. Click on Giving in the upper left corner.

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

Bequests
Naming The Loomis Communities as a beneficiary in your will is the simplest and easiest way to provide a lasting gift.

Entrance Fee Refund Designation or Annuity
A charitable gift annuity created from a portion of a resident’s entrance fee refund will give you income for life utilizing an asset that would not otherwise be accessible for your use.

Do you need more information?
Please contact Carol Constant
Director of Community Engagement
(413) 588-5184 or philanthropy@loomiscommunities.org.

Top to bottom: Loomis Village Family Feud, Loomis Village crazy hat day, Greater Holyoke Chamber of Commerce meeting, Loomis Lakeside at Reeds Landing marketing luncheon servers.