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.

“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.
For more than 100 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

As we reflect on 2022, I am humbled by the contributions made by the volunteers, business partners, team members, and residents at the Loomis Communities. Through their efforts we were able to move forward with many important initiatives that support our Mission, Vision, Guiding Principles, and our strategic priorities.

The creation of our wellness brand has been an exciting and fulfilling process whereby residents and team members worked tirelessly to generate a message that showcases what wellness looks like at the Loomis Communities. We are thrilled to unveil “Bloom”. You can read more about Bloom later in this report.

The completion of a Facilities Master Plan also provided us with an understanding of the capacity of our physical environments to support our strategic priorities. As a result, two major construction projects were identified that we are eager to begin. The first will be a long-awaited addition of a new meeting space/auditorium at Applewood. This new space will provide residents with greater opportunity to gather in groups -- large or small, attract speakers, and host other entertainment brought into the community. In addition, Applewood will add nine new apartments, enabling members from the long waiting list to join the community. The new apartments will bring new residents, with new ideas, hobbies, and life stories to share with the already diverse community of interesting people. At Loomis Village, the lobby, adjoining spaces, and the formal and casual dining rooms will be renovated. A new “flex bar” will be added for use of residents to host small gatherings, have coffee, a glass of wine, or just hang out. Finally, the addition of the Elwin and Annemarie Sanborn Billiards Room, named in honor of long-time residents and friends of Loomis, and made possible due to their generosity, will create another space for residents to come together for fun and fellowship. We are grateful to the Sanborn Family and are thrilled to honor these two very special people. We look forward to inviting you to experience the completed projects later this year. All of these projects – large and small – are specifically designed to create a warm, welcoming experience, and to enhance the ability for residents and team members to live “Life in Full Bloom”.

The Loomis Communities’ Mission, Vision, and Guiding Principles also identifies our approach and commitment to inclusion and diversity. In June of 2020, amid the many challenges of Covid-19 and in the wake of the needless death and murder of George Floyd, the Loomis Communities’ Board of Directors created a new committee to soon become the Inclusion and Social Justice Committee. This committee is comprised of Board members, community leaders, residents, and team members. Its initial focus and purpose was to increase awareness in our community of lives that may be different from our own while learning to celebrate such differences, and to identify, understand, and address racism and other “isms” in our midst (ableism, ageism, classism, genderism, heterosexism, racism, religionism, sexism, and sizeism). A questionnaire was launched and sent to all residents and team members in February of 2022. It was completed and returned by 395 residents and 123 team members. As expected, there is a strong sense of inclusion and belonging within our communities. Still there is always work to do. The committee continued its journey of growth and learning in earnest in 2022, in hopes of being catalysts for understanding and change both within the Loomis Communities, and in the greater communities in which we live and work to fulfill our mission of opening doors to worlds of positive aging.

The Loomis Communities would not thrive without the generosity of our 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 our not-for-profit mission. We thank you for your continued support – you make Loomis’ initiatives possible.

May you all be blessed with good health and peace,

Margaret Mantoni
President and CEO

Message from the Chair, Board of Directors

Thank you for the opportunity to share a few thoughts as one fiscal year ends, and another one begins. As our nation and region begin to slowly emerge from the pandemic and extraordinary challenges of the past several years, I wanted to take a brief moment to share my sincere appreciation and gratitude to the remarkable people who make up the Loomis Communities – the amazing residents and families, the resilient Senior Leadership Team, the dedicated Board members, our local neighbors, vendors, and friends for their patience, caring and mutual support as we move our way forward to a positive future. I would like to give special thanks and notice to the amazing people who are our Team Members – the 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 praise.

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 you all – for the adventures of the year past and the promise of the year to come.

Paul Lambert
Chair, Board of Directors
Governance

Board of Directors
Paul Lambert
   Chairperson
Deborah Buckley
   Vice Chairperson
Angela Belmont
Jessica Bodon
Kathleen Bowler
Paul Breen
Seunghee Cha
Steve Corrigan
Brian Craven
   Fletcher Davis
Jeffrey Hayden
   Erik Kjeldsen
Winston Lavallee
   Sara Lawrence
Anthony Pellegrino
   Deborah Snow
   Gladys Starks

Officers
Margaret Mantoni
   President and Chief Executive Officer
Carly Cavanaugh
   Treasurer and Chief Financial Officer
Peter Connor
   Clerk
Carly Cavanaugh
   Assistant Clerk

Corporators
Angela Belmont
   Jessica Bodon
   Kathleen Bowler
   Paul Breen
   Deborah Buckley
   Seunghee Cha
   Stephen Corrigan
   Brian Craven
   Catherine Craven
   Harry Craven
   Fletcher Davis
   Julie Dwight
   Lili Dwight
   Nancy Eddy
   Esmat Ezzat
   Marilyn Gass
   Wayne Gass
   Lawrence Gonneville
   Linda Gonneville
   Norman Halpern
   Jean Hazen
   Robert Hazen
   Jeffrey Hayden
   Whiting Houston, Jr.
   Eric Kjeldsen
   Paul Lambert
   Winston Lavallee
   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
   Kenneth Seyffer
   Greg Sheehan
   Deborah Snow
   Kay Sordillo
   Glady's Starks
   Mary-Anne Stearns
   Joan Steiger
   Betsy Stevens
   Richard Whiting, Jr.
Senior Leadership Team members

Margaret Mantoni
President and Chief Executive Officer

Carly Cavanaugh
Treasurer and Chief Financial Officer

Louis Iannuccilli
Executive Director, Applewood

Lori Todd
Executive Director, Loomis Lakeside at Reeds Landing

Maureen O’Toole
Executive Director, Loomis Village

Toni Hendrix
Director of Human Resources

John Anz
Director of Development and Community Engagement

Senior Leadership Team members supported these groups in 2022:

• Art for the Soul Gallery
• Association of Black Business Professionals
• Bridge4Unity
• Griffins Friends
• Holyoke Chamber of Commerce
• Holyoke Public Schools
• LeadingAge Massachusetts
• South Hadley Cultural Council
• South Hadley and Granby Chamber of Commerce
• Springfield Symphony Orchestra
• United Way
• West Springfield Capital Planning Committee
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
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 B. 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
2018    Alice Bonner
2019    Cynthia Jacelon
2020 & 2021
We were unable to honor anyone in these years due to the ongoing COVID-19 coronavirus pandemic.

2022    Mary-Anne Stearns
The Elvira Whiting Ball Award for Outstanding Service to Older Adults

2022 Honoree
Mary-Anne Stearns

Mary-Anne Stearns’ dedication to The Loomis Communities is quiet, yet steadfast. For nearly 30 years, she has served either on the Loomis Board of Directors or as Chair of the Finance Committee, and often at the same time! In these roles she has kept a close eye on the budget and guided the organization through the ever-changing economic cycles. Under her watchful eye, she was actively involved with the first CARF accreditation, the purchase of both Applewood and Reeds Landing, the development of Loomis Village, multiple bond and bank financings, and other projects which have allowed The Loomis Communities to provide outstanding person-centered lifestyle and choices to many hundreds more older adults while still remaining financially strong. Mary-Anne has also been a generous and consistent personal supporter of The Loomis Communities with her time, talent, and treasure.

Mary-Anne is a certified public accountant. She recently retired from Whittlesey P.C. in 2022 as a partner and was previously a partner with Lester Halpern & Company, P.C. in Holyoke. She is a member of the audit and finance committee of the Community Foundation of Western Massachusetts, and a trustee and finance committee member at Willie Ross School for the Deaf. Mary-Anne also formerly served as a board member and treasurer of the Greater Springfield Chapter of CISV, Inc., an international nonprofit organization, and on the planning committee for the Western New England University Tax Institute.

Mary-Anne grew up in East Longmeadow where she currently resides with her husband, John. Her daughter, Carolyn, lives in Shrewsbury and her son, Daniel, daughter-in-law, and 3 grandchildren live in Berlin, Germany.

Mary-Anne earns the respect and confidence of everyone with whom she associates. She does not command the center of attention but instead quietly works out of the spotlight to accomplish the important work that needs to be done. The Loomis Communities is grateful for her long, steady, generous, and impactful commitment to our residents and team members, and delighted to honor her and recognize her outstanding service to older adults and to Loomis with the Elvira Whiting Ball Award in 2022.

The Award for Inspirational Aging

The Award for Inspirational Aging was created in early 2020 to celebrate and honor a Loomis resident who embodies the vision of a world where older adults lead active, engaged, and inspired lives. Its presentation was planned for Spring Reception in May of that year, but that didn’t happen. Nor could it happen in 2021. Finally, in June of 2022, at the first Spring Reception since the beginning of the pandemic, the inaugural Award for Inspirational Aging was presented to Helen Kidess.

Upon meeting Helen, it only takes a minute to recognize her energy and enthusiasm! Her intrinsic curiosity makes for interesting conversation on a wide range of topics. Helen has been an active and engaged Loomis Lakeside at Reeds Landing resident for more than 17 years, serving on the Program and Philanthropy Committees, and as a key volunteer in the Craft Fair and Springfield College Humanics Day efforts as well.

Helen taught for 25 years in the Wilbraham Public Schools and returned to teaching after she moved into Reeds Landing at the age of 78. She tutors students for the Massachusetts Test for Educator Licensure in writing at the Springfield College Academic Success Center. Even through the pandemic, Helen continued to teach virtually via Zoom. Today’s students are still benefiting from her soft-spoken but candid coaching.

Helen was also a lifelong violin player, but decided to learn to play the viola in her late 70’s. She played with the Old Post Road Orchestra and its string quartet for ten years, and frequently at Loomis Lakeside at Reeds Landing as well. Helen’s family includes her daughter Tamie Kidess Lucey and her husband Art from Longmeadow, her granddaughter Dr. Alexandra Lucey-Carra and her husband Steven from Millers Falls, and her grandson Tyler Kidess Lucey and his fiancé Nicole from Hartford, CT.

An inspiration to us all, Helen finally became the inaugural recipient of the new Award for Inspirational Aging in 2022!
When doors to worlds of positive aging are opened, it allows you to live your life in full bloom! This year, we are excited to be unveiling bloom, the Loomis Communities wellness initiative.
Bloom will focus on the eight dimensions of wellness outlined in our strategic plan. We have outlined just a few of the dimensions below as an example. To find out more about the other dimensions, make sure to grab yourself a bloom book!

“I love to breathe in the air, relish in the beauty and enjoy the company of whomever I’ve talked into walking with me! And when the weather doesn’t cooperate, I like to work with my personal trainer or take a swim. I feel better when I keep moving!”

- Don Sibley - Loomis Village

“I’m so happy to be among people, a real community, not only for the social aspects, but to be there for each other no matter what life brings.”

- Dick Weston - Loomis Lakeside at Reeds Landing

“There are so many opportunities to learn new things. The chance to take courses with Five College Learning in Retirement has been amazing. The lectures were so interesting and lead to very stimulating conversations!”

- Sandi Albertson-Shea - Applewood

“There’s something very satisfying about putting tree seedlings and flowers into the ground. It makes me feel connected to the earth. People here are passionate about leaving the planet in a better place for the next generation”

- Charlotte Schechter - Loomis Village
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 across the region in 2022:

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.

- **Alzheimer’s Association Walk**
- **Amherst Survival Center**
- **Center for EcoTechnology** (EcoBuilding Bargains)
- Christmas Toy Collections
- Friends of South Hadley Seniors / South Hadley Council on Aging
- Mitten and Sock Drives to support local schools and churches
- **Salvation Army**
- School supplies for **Springfield Rescue Mission**
- South Hadley and Granby food bank, **Neighbors Helping Neighbors**
- **Springfield Boys & Girls Club**
- Springfield Pharmacy Toy Drive
- **YMCA of Western Massachusetts**

**Committee Members:**

**Residents**
Betsy Belden, Maggie Horn, Esta Pekow, Rachel Tierney

**Team Members**
John Anz, Hilary Loftus, Brenda Mendoza, Kelley Murphy, Maureen O’Toole
Fulfilling the mission and vision of The Loomis Communities is only possible thanks to the generous and loyal support of its many donors across a wide range of constituencies. Without the philanthropic support derived from hundreds of individual gifts, we could not provide the services, care, programs, and activities which our residents and their families need and deserve.

In 2022, we were blessed with the good fortune of an improving health climate amid the ongoing pandemic, the return of our traditional Spring Reception, great advocacy and response during our Annual Appeal, and an extraordinary year-end challenge from a former board member.

Thank you to everyone listed on the following pages whose care and commitment to the future of the Loomis Communities is so deeply appreciated.

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Giving</td>
<td>$124,431</td>
</tr>
<tr>
<td>Memorial and Honoree Giving</td>
<td>$3,125</td>
</tr>
<tr>
<td>Spring Reception</td>
<td>$40,255</td>
</tr>
<tr>
<td>Special Projects *</td>
<td>$5,885</td>
</tr>
<tr>
<td>Other Restricted Giving **</td>
<td>$30,000</td>
</tr>
</tbody>
</table>

**TOTAL CHARITABLE GIFTS** $203,696

* Special Projects
  - Sustainability / EV Charging Stations
  - LLRL Craft Fair

** Other Restricted Giving
  - Realized Estate Bequest

The Loomis Communities supporters include:

- 100% of Board Members
- 100% of Senior Management and 8 Team Members
- 47% of Applewood Residents
- 53% of Loomis Lakeside at Reeds Landing Residents
- 51% of Loomis Village Residents
- 36 Businesses and Corporate Donors
- 61 Family Members and Friends
Spring Reception 2022 was held on Thursday, June 16th outdoors at Loomis Village in South Hadley, marking the first such gala affair since 2019. Wonderful food, fellowship, music, and award presentations highlighted the event which raised critical monies for community Friendship Funds and the Nursing Center at Loomis Lakeside at Reeds Landing.

Thank you to our 2022 Spring Reception Business Sponsors and Individual Donors for their generous support.

**Business Sponsors**

**Benefactors - $5,000 +**
- Mountain View Landscapes and Lawncare
- PeoplesBank

**Sustainers - $2,500 - $4,999**
- Andrew Associates
- Goss & McLain Insurance
- Smith Brothers

**Patrons - $1,000 - $2,499**
- Atlantic Charter Insurance
- Health New England
- Lyon & Fitzpatrick
- Sodexo
- Specialized Construction
- Springfield College
- Tsomides Associates Architects Planners

**Gold - $500 - $999**
- Aladco Linen Service
- Amanda Boland
- Belmont Laundry
- Holyoke Millwork
- Mercier Carpet Service
- Paul Robbins Associates
- PIP Marketing, Signs, Print
- Springfield Electrical Co
- Westfield Bank

**Silver - $250 - $499**
- Adam Quenneville Roofing & Siding
- Altus Dental
- Braman Termite & Pest Elimination
- Clay & Associates
- Forastiere Smith Funeral Home
- Geriatric Medical & Supply
- Hackworth Systems
- Northern Tree Service
- Whittlesey

**Bronze - Up to $249**
- Darcy Company
- Kittredge Equipment Co
- Lee Audio ‘N Security
- Reminder Publications
- Security & Fire Integrations
- T. J. Conway Company

**Individual Donors**

Jeanne Achille
Shirley Appy
John and Elizabeth Armstrong
Donald Bliss
Judy Boehlert
Robert Boilard
Mary Boulais
Linda Bowman
Ursula Coleman
Dee and Marty Conway
Roberta Crowell
Nancy Eddy
Julie Dwight
Mary Falk
Jane Ferguson
Lynne Forbes
Eugenie Garman
Wayne and Marilyn Gass
Phyllis Gracki
Teresa Harris
Carol Katz
Erik and Diane Kjeldsen
Sue LaMastro
Gail Markley
Barbara Mason
Ann McIntosh
Virginia Miller
Sally Motzer
Nancy Nieske
Eleanor Parke
Anthony Pellegrino
Rose Porcello
Julia Powers
Lilian Randall
Janet Roper
Felix Salzano
Eileen and Owen Santer
Kenneth Seyffer
Tom Senecal
Phyllis Sleigh
Kay Sordillo
Michiko and Reynold Spector
Marty Spencer
Shirley Steiner
Rachel Tierney
Signia and Stan Warner
Beverly Weeks
Ann Weickert
Angela Wright
The Founders Society was created and named in 2005 to honor the Holyoke women 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 (2)  Eleanor Parke
Dorothy Gavin  Felix Salzano
Arthur (and Elizabeth) Gionti  Art (and Barbara) Stanley
Beverly (and Robert) Henneman  Alex and Barbara Stetynski
Kit (and Ward) Lambert  Patricia (and Robert) Webler

Founders Society Legacy Members

ANONYMOUS  Reggie Ludwig
Henry Allen and Edith Perman-Allen  Mary Lynch
Phebe Amsden  Margaret Maloney
Harold and Ruth Bailey  Robert Markarian
Christine Balch  Richard Martin
Edward Bayon  Louise Merritt
Albert Berkowitz  Jeanne, Mary, and Rebecca Murdoch
Diana Bliss  Maril O’Malley
Priscilla Carter  Ken and Kathleen Padelford
Jack Clarke  Samuel Potsubay
Carol Craig  Arlottie Potts
Barbara Curtis  Arthur Rankin
Frank Fowler  Richard and Jean Read
Ralph Fowler  Norma Sampson
Timothy Fowler  Elwin Sanborn
Horace and Eloise Fuller  Barbara Sheldon
Ilva Funke  Robert Smith
Sonja Goodwin  Walter and Phyllis Smith
Theodore Green  Clio Stearns
Mahat Guest  Johanna Susat
Joan Hafey  Thomas Tamblyn
Elizabeth Haig  Caroline Turtle
Willard and Elizabeth Hale  Ellen Tuttle
Vonnie Hayes  Elizabeth Waring
Charles Johnson  Hans and Edith Wayne
Louise Kennedy  L. Albert and Barbara Webb
Alice Koenigsburg  Dorothy Wheat
Nancy Ladd  Muriel Wilson
Otto and Helen Landgraf  Elizabeth Ryan Wolfe
Mary Kay Landon
William Lieson

The William S. Loomis Leadership Society recognizes those individuals who contribute annually at a leadership level of $1,000 or more. They are recognized accordingly in the Honor Roll of Contributors on the following pages, and receive benefits similar to and reciprocal with Founders Society members for their generosity.
## Honor Roll of Contributors in 2022

### William S. Loomis Leadership Societies

#### Visionary ($10,000 and above)
- Dorothy Gavin
- Trust of Sonja K. Goodwin
- Marc and Diana Meiches Family Foundation
- PeoplesBank

#### Benefactor ($5,000 - $9,999)
- Michael and Linda Costello
- Lorraine and Tony Lachowetz
- Mountain View Landscapes

#### Sustainer ($2,500 - $4,999)
- ANONYMOUS (2)
- Andrews Associates, Inc.
- Goss & McLain Insurance Agency
- Jennifer and Michael Hect
- Smith Brothers Insurance, Inc.
- Meridith Weiderman

#### Patron ($1,000 - $2,499)
- ANONYMOUS (4)
- Shirley Appy
- John and Elizabeth Armstrong
- Atlantic Charter Insurance
- Sanford and Elizabeth Belden
- Deborah Buckley
- Seunghie Cha and Anthony Bishop
- Peter and Marlene Connor
- Fletcher and Elizabeth Davis
- Edith Fabos
- Sally Fenix
- Arthur Gionti
- Bernyce Grant
- Health New England
- Toni Hendrix
- Maggie Horn
- Janice and Robert Keefe
- Sue LaMastro

#### Gold ($500 - $999)
- ANONYMOUS (2)
- Aladco Linen Services
- John and Brenna Anz
- Roger and Glenna Ball
- Roger and Susan Beer
- Belmont Laundry, Inc.
- William Bixby
- Robert and Jane Boilard
- Albert and Janet Chevan
- Dianne Clinton
- Helen Cohn
- Ursula Coleman
- Jane Condon
- P. Martin and Dianne Conway
- Susan Corcoran
- Brian Craven
- Margaret and William Daniels
- Stephen and Judith Ellenburg
- Elliott Fortescue
- Linda Gordon
- Janet Hale
- David and Christine Heckman
- Holyoke Millwork & Lumber Co., Inc.
- Lou Iannuccilli
- Sheila Klem
- Winston and Margaret Lavallee
- Sara Lawrence
- The Beauty Salon at Loomis Lakeside
- Gail Markley
- Mercier’s Carpet Service, Inc.
- Sally Motzer
- Mimi Murray and Nancy Meyer
- Eloise Nickerson
- Paul Robbins Associates, Inc.
- Dorothy J. Posner Living Trust
- Lilian Randall
- Clara Rodrigues
- Springfield Electrical Co., Inc.
- Mary-Anne and John Stearns
- Shirley Steiner
- Mary and Michael Tarail
- Lori and Mark Todd
- Westfield Bank
- Richard and Theresa Weston

#### Silver ($250 - $499)
- ANONYMOUS (6)
- Adam Quenneville Roofing & Siding, Inc.
- Altus Dental Insurance Company
- Jean Anwyll
- Barbara Banik
- Carolyn Bentley
- Wendy Jones Boisseau
- Braman Termite & Pest Elimination
- Paul and Elizabeth Breen
- Albert Breton
- Robert Bucknell
- Helen Casey
- Clay & Associates, LLC
- Stephen and Maureen Corrigan

## Annual Fund Giving Clubs

#### Gold ($500 - $999)
- Todd Lee and Karen Dalton
- Lyon & Fitzpatrick LLP
- Ann Mann
- Paul and Margaret Mantoni
- Edith McEvoy
- Colette Moriarty
- Jerome and Nancy Myers
- Janet Potash
- Janet Roper
- Lois Schwab
- Sodexo Seniors
- Specialized Construction Inc.
- Springfield College
- Philip and Nancy Standel
- Joan Steiger
- Tsomides Associates Architects Planners
- Beverly Weeks
- Andrea Weisberg
- James and Helen Wick
- Anne Wing

#### Silver ($250 - $499)
- Forastiere Family Funeral & Cremation
- Robert and Barbara Franzini
- Wayne and Marilyn Gass
- Geriatric Medical
- Lawrence and Linda Gonville
- Hackworth Systems LLC
- Jeffrey Hayden
- Robert and Jean Hazen
- Ann Heropoulos
- Whiting and Helene Houston
- Elaine Ironfield
- George and Judith Jones
- Robert and Constance Law
- David and Jo-Ann Longworth
- William Masalski and Kathleen Woods Masalski
- Mary Jo Maydew
- Ann McIntosh
- Lenore Miller
- Northern Tree Service, Inc.
- Maureen O’Toole
- Eleanor Parke
- Esta Pekow
- Anthony Pellegrino
- Thomas Pratt
- Eileen Santer
- Roger and Patricia Schifferli
- David Schmidt
- Thomas Senecal
- Kenneth Seyffer

---

Five or more years of continuous giving
Ten or more years of continuous giving
Thank you for your generous financial support of The Loomis Communities in 2022!

Deborah Snow
Marcia Spencer
Gennifer Sussman
Alice Swift
Lynne Tabor and Dorett “Pinky” Hope
Stephen Wall
Whittlesey
Nancy Young
Roger Zimmerman

Bronze ($100 - $249)
ANONYMOUS (7)
Jeanne Achille
Douglas Adler
Carol Albano
Ione Albertson
Jane Allan
Estelle Anderson
Frances Bancroft
Sandra Barbeau
Ruth Barney
Ann Beardsley
Josephine Bellew
Angela Belmont
Donald Bliss
Ron Blume
Jessica Bodon
Judy Boehlert
Phyllis Boilard
Emoke Boldvay
Anna Boulden
Kathleen Bowler
Eugenia Burn
Anne Cann
Richard Cezarek
Yvonne Cherry
Joan Cioch
Casey Clark
Shirley Conant
Rona Conrad
Arrelle Cook
Susan Cramer
Robert Crowell
Donald Donihue
Katherine Duclos
Nancy Eddy
John and Lillian Edman
Ruth Eleris
Mary Falk
Jane Ferguson
Jay and Tina Ferri
Marion Fischetti
Eugenie Garman
Matthew Giroux
Phyllis Gracki
Teresa Harris
Audrey Heinrichs
Harold J. Henry, Jr. (Jack)
Margaret Hornsell
Randall and Karen Hyvonen
Claire James
Pamela Jones
Albert Kalmbach
Beatrice Kaplan
Carol Katz
Helen Kidess
Kittredge Equipment Company
Erik and Diane Kjeldsen
Kathy Knowles
Paul and Cynthia Lambert
Edith and Richard Lebowitz
Lee Audio ‘N Security, Inc.
Lorraine Lis
Hilary Loftus
Nancy MacCallum
Curtis and Janet Mandeville
Barbara Mason
Rena Mathews
Angelo Mazoccolo
Katharine McGovern
Helen Monko
Barbara Murphy
Katherine Naughton
Joanne Omang and David Burnham
JoAnne O’Neil
Robert Perkins
John Pietras
Rose Porcello
Ann and Ken Powell
Reminder Publications, Inc.
Carol Roberts
Alice Roumas
Felix Salzano
Peter and Suzanne Sanborn
John and Charlotte Schechter
Security and Fire Integrations
Susan and David Sheridan
Phyllis Sleigh
Michiko and Reynold Spector
Gladys Starks
Rita Starzyk and Drewey Darnell
Margaret Stevens
Patricia Szyluk
Gertrud Temple
The Darcy Company
Rachel Tierney
Ruth Tompkins
Margaret Trase

Ann Weickert
Elizabeth Wheeler
Anne and John Wilson
Patricia Wisch
Joseph and Angela Wright
Patricia Wright
Ronald and Maureen Ziembala

Friends (Up to $99)
ANONYMOUS (2)
Sandra Albertson-Shea
Thomas and Diane Barber
Mary Boulais
Linda Bowman
Virginia Brewer
James and Kathleen Brisbois
Carol and Richard Constant
Scott and Anne Daniels
Julie Dwight
Ryan and Brittany Ellis
Lynne Forbes
Barbara Hamann
Anne Hazzard
Beth Healy
Audrey Heaphy
Elizabeth Howlett
Walter Korzec and Frances Henry
Virginia Miller
Joanne Murphy
Ed and Dot Perrella
John Powers
Robert Robertson
Marie Rohan
Bonnie Roncone
Ruth Sandow
Katherine Sordillo
T. J. Conway Company
Leonard and Ellen Von Flaten
Signia Warner
Ann Yesu

Gifts In Kind
Ruth Barney
Cecelia Brown
Susan Callahan
Mia Ezell
Norman Halpern
Ruth Purtilo and Vard Johnson
Ivette and Angel Santiago
Springfield College
Springfield Garden Club
Gennifer Sussman
Robert Tuthill
Gordon Wyse

Fifteen or more years of continuous giving
Twenty or more years of continuous giving
Gifts in Memory of

Martha J. Anwyll
Jean Anwyll

Dick Bentley
Carolyn Bentley

Roger Charles Conant
Shirley Conant

Dorothy Dempsey
Anonymous

Donald Ferri
Eleanor Parke

Frank Fischetti
Marion Fischetti

Ellie Fraser
Walter Korzec and Frances Henry

George Goodwin
Sandra Albertson-Shea

Graham Gordon
Linda Gordon

David D. Brown III
Anonymous

Charley Johnson
Anna Boulden
Helen Monko
Eleanor Parke
Roger Zimmerman

Charles Klem Jr.
Sheila Klem

Robert L. Clinton Jr.
Dianne Clinton

Mary Kalmbach
Leonard and Ellen Von Flatern

Elizabeth Lambert
Paul and Cynthia Lambert

Rita and Lawrence Longworth
David and Jo-Ann Longworth

Ms. Judith McKenzie and
Mr. Richard P. Wall
Stephen E. Wall

James D. Miller
Anonymous

Cynthia Moran
Mary and Michael Tarail

Dot O’Connell
Helen Monko

John Osgood
Mary-Anne and John Stearns

Maisie Pearson
Gennifer Sussman (GIK)

Dorothy Posner
Dorothy J. Posner Living Trust

Jeanne Potash
Albert and Janet Chevan

Robert A. and Jeanne F. Potash
Janet Potash

Nancy Rodgers
Roger Zimmerman

Shirley Roseman
Cecilia Brown (GIK)

Bob Russell
Rachel Tierney

Elwin Sanborn
Peter and Suzanne Sanborn

Owen Santer
Dianne Clinton
Jan and Bob Keefe
Winston and Margaret Lavallee
Eileen Santer

Lolita Seyffer
Kenneth Seyffer

Ray Shea
Ruth Purtilo and Vard Johnson (GIK)

Alvin Steiner
Shirley Steiner

Dr. Donald R. Sweeney
Edith McEvoy

Barbara Tuthill
Robert Tuthill (GIK)

Nelson Weiderman
Meridith Weiderman

Henry Wolfe
Scott and Anne Daniels

Ruth Gilbert Young
Patricia Szyluk

Libby Wading
Rachel Tierney

My Husband
Sally Fenix

Gifts in Honor of

Vesta Bisbee
Kathleen and James Brisbois
Jennifer Hect

Peter Courtney and Deb Perry
Joanne Murphy

Helen Kidess
Mimi Murray

Diana and Marc Meiches
John Anz

Maureen O’Toole
John and Charlotte Schechter

My Family
Sally Fenix
Financial Report

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

Consolidated Balance Sheets
(as of December 31, 2022)

<table>
<thead>
<tr>
<th>Assets</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current assets:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$ 5,133,102</td>
<td>$ 6,515,889</td>
</tr>
<tr>
<td>Accounts receivable - residents, net</td>
<td>850,044</td>
<td>616,040</td>
</tr>
<tr>
<td>Accounts receivable - other</td>
<td>974,620</td>
<td>963,919</td>
</tr>
<tr>
<td>Prepaid expenses and other assets</td>
<td>416,720</td>
<td>535,551</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td><strong>7,374,486</strong></td>
<td><strong>8,631,399</strong></td>
</tr>
<tr>
<td>Assets limited as to use</td>
<td>15,925,484</td>
<td>13,369,598</td>
</tr>
<tr>
<td>Escrow receivable</td>
<td>150,000</td>
<td>200,000</td>
</tr>
<tr>
<td>Investments</td>
<td>33,335,571</td>
<td>37,725,380</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>46,195,096</td>
<td>44,900,810</td>
</tr>
<tr>
<td>Right-of-use asset, operating lease</td>
<td>1,407,946</td>
<td>1,406,802</td>
</tr>
<tr>
<td>Beneficial interest in perpetual trusts</td>
<td>1,141,906</td>
<td>1,482,329</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>105,530,489</strong></td>
<td><strong>107,716,318</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities and Net Assets</th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable</td>
<td>$ 1,301,487</td>
<td>$ 1,999,486</td>
</tr>
<tr>
<td>Accrued expenses and other current liabilities</td>
<td>1,742,289</td>
<td>2,035,756</td>
</tr>
<tr>
<td>Current maturities of bonds and mortgage notes payable</td>
<td>557,397</td>
<td>1,387,415</td>
</tr>
<tr>
<td>Current portion of refundable entrance fees</td>
<td>8,632,054</td>
<td>8,272,741</td>
</tr>
<tr>
<td><strong>Total Current Liabilities</strong></td>
<td><strong>12,233,227</strong></td>
<td><strong>13,695,398</strong></td>
</tr>
<tr>
<td>Long-term liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonds and mortgage notes payable, net of current maturities</td>
<td>21,850,082</td>
<td>19,343,864</td>
</tr>
<tr>
<td>Deferred gain on sale of property and equipment</td>
<td>150,000</td>
<td>200,000</td>
</tr>
<tr>
<td>Deferred entrance fees, net</td>
<td>13,813,251</td>
<td>13,196,935</td>
</tr>
<tr>
<td>Refundable deposits</td>
<td>762,450</td>
<td>704,500</td>
</tr>
<tr>
<td>Refundable entrance fees</td>
<td>54,505,005</td>
<td>52,998,327</td>
</tr>
<tr>
<td>Operating lease liability</td>
<td>1,663,900</td>
<td>1,652,322</td>
</tr>
<tr>
<td>Liability under charitable gift annuities</td>
<td>72,770</td>
<td>75,513</td>
</tr>
<tr>
<td><strong>Total long-term liabilities</strong></td>
<td><strong>92,817,458</strong></td>
<td><strong>88,171,461</strong></td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>105,050,685</strong></td>
<td><strong>101,866,859</strong></td>
</tr>
<tr>
<td>Net Assets:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without donor restrictions</td>
<td>(4,456,321)</td>
<td>161,951</td>
</tr>
<tr>
<td>With donor restrictions</td>
<td>4,936,125</td>
<td>5,687,508</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>479,804</strong></td>
<td><strong>5,849,459</strong></td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$ 105,530,489</strong></td>
<td><strong>$ 107,716,318</strong></td>
</tr>
</tbody>
</table>

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, 2022)

**General Investments** ....................................................................................................................................................... $ 12,175,005

**Board Designated Endowment** ....................................................................................................................................  $ 10,579,862
  Used according to the Endowment Spending Policy established by the Board of Directors.

**Bond Proceed Fund** .........................................................................................................................................................  $ 2,658,208
  Restricted for the repayment of debt or the construction of certain health care facilities.

**Barbara Sheldon Trust** ..................................................................................................................................................... $ 2,041,867
  Principal restricted, the income is directed each year according to need, by the Board of Directors.

**Principal Restricted Funds** ..............................................................................................................................................  $ 1,536,531
  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.

**Arlottie Potts and Louise Merritt Endowment Funds** ................................................................................................ $ 1,141,906
  Principal restricted, the income is directed each year, according to need, by the Board of Directors.

**Wright Charities** ................................................................................................................................................................ $ 1,603,849
  Principal restricted, four percent of this principal restricted fund is used to subsidize the fees for residents from Easthampton, Westhampton and Southampton who otherwise could not afford to live at Loomis.

**Applewood Funds**
  **Applewood Residents Assistance Funds** .............................................................................................................. $ 75,169
  **Applewood General Fund** ...................................................................................................................................... $ 118,828

**Loomis Communities Friendship Funds** ........................................................................................................................... $ 120,021
  Not principal restricted, available to support residents whose financial resources are not adequate to pay their regular fees.

**Loomis Lakeside at Reeds Landing Philanthropic Fund** ............................................................................................... $ 394,110
  Not principal restricted, available for staff scholarships, resident Friendship Funds and other purposes that will benefit the residents of Loomis Lakeside at Reeds Landing.

**Loomis Lakeside at Reeds Landing Memorial Reserve Fund** .....................................................................................  $ 440,284
  Not principal restricted, held at the Community Foundation of Western Massachusetts for the benefit of Loomis Lakeside at Reeds Landing.

**Loomis Lakeside at Reeds Landing Fund** ............................................................................................................................ $ 25,931
  Permanently endowed fund, held at the Community Foundation of Western Massachusetts for the benefit of Loomis Lakeside at Reeds Landing.
## Financial Performance

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating Revenues</td>
<td>28,112,473</td>
<td>25,367,570</td>
</tr>
<tr>
<td>Expenses:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and Benefits</td>
<td>13,328,601</td>
<td>12,275,118</td>
</tr>
<tr>
<td>Supplies and Other</td>
<td>11,117,145</td>
<td>10,874,933</td>
</tr>
<tr>
<td>Depreciation and Amortization</td>
<td>3,881,751</td>
<td>3,877,048</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>28,327,497</td>
<td>27,027,099</td>
</tr>
<tr>
<td>Operating Gain (Loss)</td>
<td>(215,024)</td>
<td>(1,659,529)</td>
</tr>
<tr>
<td>Non-Operating Revenues</td>
<td>(5,154,631)</td>
<td>6,671,571</td>
</tr>
<tr>
<td>Net Gain (Loss)</td>
<td>(5,369,655)</td>
<td>5,012,042</td>
</tr>
<tr>
<td>Days Cash on Hand</td>
<td>685</td>
<td>608</td>
</tr>
<tr>
<td>Reserve Ratio (2)</td>
<td>2.03</td>
<td>2.08</td>
</tr>
<tr>
<td>Debt Service Coverage Ratio (3)</td>
<td>4.62</td>
<td>3.01</td>
</tr>
</tbody>
</table>

### NOTES:

(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 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. 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.

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

Do you need more information?
Please contact John Anz
Director of Development and Community Engagement
(413) 532-5325 or janz@loomiscommunities.org