



2024 Annual Report





Mission Statement

We open doors to worlds of positive aging.

Vision Statement

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

Guiding Principles

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

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

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

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

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

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

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

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

“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.

The Loomis Communities



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

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



Applewood

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

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



Loomis Lakeside at Reeds Landing

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

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



Loomis Village

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

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

A Report from the President and CEO

In these times of uncertainty, it gives me great pleasure to share that The Loomis Communities completed another remarkable year. Guided by our mission “we open doors to worlds of positive aging”; we’ve continued to strengthen our organization in ways that reflect both our guiding principles and our vision for the future.

This past year we began to enjoy the new, and renovated spaces at all three communities. In addition to new common spaces, Applewood welcomed residents into the newly constructed apartments, each bringing new ideas for committees, programs, and enhancement to the already vibrant lifestyle enjoyed by all. Loomis Lakeside at Reeds Landing saw the renovation and re-opening of the Mezzanine assisted living neighborhood. We are particularly proud that along with our internal vision, our own team of talented contractors completed the majority of the work, saving Loomis Lakeside significant dollars. The project includes 11 additional apartments, an indoor walking trail, birds, a water feature, dining and great rooms, and even a skee-ball machine. At Loomis Village, residents, guests, and team members have been enjoying a complete renovation of the common spaces including a newly constructed billiards room, and flexible gathering spaces. Two of these new spaces were made possible by the charitable

generosity of Elwin Sanborn, and Peter and Marlene Connor. All of these projects not only enhance quality of life and wellness, but also reflect our long-term commitment to thoughtful, resident-centered growth.

We know that our strength lies in connection. Over the past year, we’ve enhanced partnerships with a number of educational institutions, local health providers, and other fellow nonprofits. One standout example is our partnership with Mass General-Cooley Dickinson Hospital. This partnership enables both of us to bring subject matter experts to the greater community through a lecture series on a broad range of topics around health, medicine, and well-being.

I am also pleased to report that we remain financially sound, with another year of strong financial performance. Our careful planning, strategic partnerships, and philanthropic support enable us to do the kinds of projects outlined above, offer competitive wages and benefits to team members who commit themselves to the work we do, and most importantly to provide a sense of financial security to those who have chosen to make Loomis their home.

As we look to the future, we must focus on advocating for the people and ideals we hold at the core of our purpose. In collaboration with LeadingAge and other

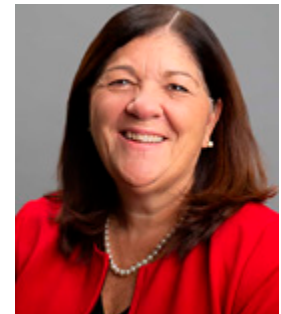
sector partners, we take part in legislative advocacy efforts to protect Medicaid funding, support workforce development, and promote age-friendly housing initiatives. We meet with lawmakers sharing stories of residents and team members to humanize the policies that shape their lives. We are committed to being not just a provider of services, but a driver of change in how society views and values aging.

I remain deeply grateful to each one of you. Your support, participation, and belief in our mission empower us to do this work – and to do it with purpose and passion. Together we will continue to advocate, educate, care, and lead.

May you all be blessed with good health and peace,

Margaret Mantoni

President and CEO



Message from the Chair, Board of Directors

As I complete my first year as board chair for the second time, I think about how Loomis has changed since I first became involved over 25 years ago. We have grown into a multi-community organization where our commitment to being the “Pioneer in Senior Living in Western MA” continues to hold true. Our Vision of “building on our proud traditions of integrity, security, and hospitality” is clear.

The Loomis Communities make the most of everything the Pioneer Valley has to offer through partnerships with a diverse array of organizations. We continue to bring outstanding opportunities to our residents and the communities we call home.

This year’s accomplishments, which included completing physical construction projects at each of our communities, as well as enhanced programming opportunities, are a testament to the hard work, dedication, and collaboration of our entire team. I want to thank everyone for their commitment during the year: the amazing residents and families, the staff, the resilient Senior Leadership Team, the Board of Directors and so many more that I cannot begin to list. These resolute individuals help make each of our communities the welcoming, warm, hospitable places that they are. Their service and efforts are well deserving of our recognition and praise.

I am incredibly grateful for your contributions. We are focused on the future, and I am confident in our ability to achieve continued success for many years to come.

Deborah Buckley

Chair, Board of Directors





Governance



Applewood Resident Council

Standing (L-R): Jackie Lee, Clarise Patton, Val Parsegian, Janet Potash, Kit Sawyer, Linda Harris, Kathy Gregg

Seated (L-R): Alice Swift, Judy Bianciardi, Gennifer Sussman, Sandi Albertson-Shea, Vard Johnson



Loomis Lakeside at Reeds Landing Association

Standing (L-R): Dick Weston, Ann Beardsley, Bob Law, Nancy Standel, Ron Ziemba

Seated (L-R): Ellie Santos, Ruth Barney, Marguerite Anastasovites, Terry Weston



Loomis Village Resident Association

(L-R): Roger Beer, Holly Taylor, Anne Wing, Ken Powell

Board of Directors (2024-2025)

Deborah Buckley,
Chairperson
Deborah Snow,
Vice Chairperson
Sanford Belden
Paul Breen
Seunghye Cha
Stephen Corrigan
Patricia Crutchfield

Jeffrey Hayden
Erik Kjeldsen
Paul Lambert
Sara Lawrence
Thomas Pratt
Ruth Purtilo
Max Winters
Heather Zoeller

Officers

Margaret Mantoni
President and Chief Executive Officer
Michael Jarry
Treasurer and Chief Financial Officer
Peter Connor
Clerk

Corporators

Sanford Belden
Kathleen Bowler
Paul Breen
Deborah Buckley
Seunghye Cha
Casey Clark
Stephen Corrigan
Brian Craven
Catherine Craven
Harry Craven
Patricia Crutchfield
Julie Dwight
Lili Dwight
Nancy Eddy
Esmat Ezzat
Marilyn Gass
Wayne Gass
Linda Gonneville
Jeffrey Hayden
Whiting Houston, Jr.
Erik Kjeldsen
Paul Lambert

Sara Lawrence
Mary Jo Maydew
Ann McIntosh
Gwendolyn Morrissey
James Morrissey
Anthony Pellegrino
John Pietras
Thomas Pratt
Ruth Purtilo
Marie Rohan
Thomas Senecal
Deborah Snow
Kay Sordillo
Gladys Starks
Mary-Anne Stearns
Joan Steiger
Betsy Stevens
Richard Whiting, Jr.
Max Winters
Heather Zoeller

Senior Leadership Team

Margaret Mantoni
President and Chief Executive Officer

Michael Jarry
Treasurer and Chief Financial Officer

Barry Waite
Director of Human Resources and Corporate Compliance Officer

John Anz
Director of Development and Community Engagement

Kristen Lamoureux
Executive Director, Applewood

Maureen O'Toole
Executive Director, Loomis Village

Irene Sullivan
Director, Loomis At Your Door

Lori Todd
Executive Director, Loomis Lakeside at Reeds Landing

Senior Leadership Team members supported these groups in 2024:

- Brattleboro Economic Development Council
- Holyoke Public Schools
- LeadingAge Massachusetts
- MASH ("Music & Arts South Hadley")
- South Hadley Cultural Council
- South Hadley and Granby Chamber of Commerce
- South Hadley Town Meeting
- Springfield Symphony Orchestra
- Valley Health Systems



Loomis Communities residents and team members met at Cooley Dickinson Hospital as part of a new partnership and lecture series. Here a panel of CDH clinical and administrative staff present on the future of emergency medicine.



Holyoke Community College President Dr. George Timmons addresses a group of residents, team members, and Loomis board members at Loomis Village on his first full year at HCC and what's possible for both HCC and Loomis working together in the future.

Elvira Whiting Ball 1843-1915

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

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

Prior recipients:

2002	Clarke S. Lyon	2016	Carol C. Katz
2003	1981 Loomis Board of Directors	2017	Rachel E. Tierney
2004	Lawrence R. Gonneville	2018	Alice Bonner
2005	Joan C. Steiger	2019	Cynthia Jacelon
2006	Gwendolyn Glass	2020 & 2021 <i>We were unable to honor anyone in 2020 or 2021 due to the COVID-19 pandemic.</i>	
2007	Bruce A. Yarber		
2008	Founding Directors of Applewood	2022	Mary-Anne Stearns
2009	Esmat Ezzat	2023	Elissa Sherman
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		



The Award for Inspirational Aging

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

Prior recipients:

2022	Helen Kidess
2023	Jeanne Achille, Randy Hyvonen, John Schechter

2024 Honoree - Peter Courtney

Peter Courtney has certainly seen and done a lot! He has lived in Massachusetts, Ohio, Pennsylvania, Virginia, and other states as well. College and Divinity School took him to New York and Connecticut. Parish service took him from New York to Hawaii, Georgia, Nevada, Maryland, and the US Virgin Islands. Exchange sabbaticals took him as far as Australia and as close as Maine.

In the midst of all of this, during Thanksgiving weekend in 1986 Peter married his second wife, Deborah Taft Perry. They have been friends for almost 50 years. And in 2005 Peter finally retired.

During 2015 and early 2016 Peter and Debby decided to give up living as country squires in Athens, GA and move to a

The Elvira Whiting Ball Award for Outstanding Service to Older Adults

2024 Honoree - Carol Constant

Carol Constant is and has been deeply dedicated to improving the lives of older adults, including those living with dementia and their care partners, for many, many years. She is a Certified Dementia Practitioner, a Family Educator for the Alzheimer's Association, and a Certified Savvy Caregiver Leader. In these roles, she has led or co- led dementia awareness, dementia communication, and dementia caregiver support programs in a variety of settings, for family caregivers, members of faith communities, volunteers, front line workers, and business leaders.

Carol is also Chair of the Town of South Hadley Age and Dementia Friendly initiative, serves on the South Hadley Selectboard, and is a Board Member of the Friends of South Hadley Seniors. She previously served on the Council on Aging Board of Directors and as a member of the South Hadley Senior Center Building Committee. She is a true leader in her hometown both in government affairs as well as critical initiatives for older adults.

Prior to her retirement in 2021, Carol served The Loomis Communities for 13 years as its Director of Development and Community Engagement. In this role she not only worked to raise funds in support of The Loomis Communities, she co-led the committee for Loomis' strategic focus area for dementia that recommended an inclusive approach to

residents living with dementia. In 2019, she was honored as a Healthcare Hero by BusinessWest and in 2018, as South Hadley Lions Club Citizen of the Year.

To keep on top of things with her own normal age-related memory challenges, Carol teaches the UCLA Memory Training program. She also enjoys spending time with her husband Rick and their amazing daughters, Kristina and Virginia, playing tennis, skiing, hiking, and quilting.

We are so deeply grateful for both her leadership, service, and friendship, and so proud to honor her with the 2024 *Elvira Whiting Ball Award*.



retirement community. The only requirement was that it had to have a woodworking shop. And Loomis Lakeside at Reeds Landing did! Not until moving here did Peter discover his own deep familial roots in the Springfield and Deerfield areas dating back to the 1690's.

Peter says, "My life like most everyone else's has been characterized by constant change and re-invention. I assume that process will continue. Currently I play court jester whenever there is an audience, make lots of sawdust, practice being a food snob, and act as caregiver to my beloved Debby."

But it is not just for what he has done and where he has been that Peter is so deeply appreciated and recognized for his accomplishments. It is because, as a Loomis Lakeside at Reeds Landing resident, Peter has and continues to play

many other important and inspiring roles in the lives of his neighbors and friends there as he continues to evolve, improve, and reinvent himself: former pastor, community leader, sage, confidant, woodworker, trusted friend, and so much more.

The Loomis Communities is better with him among us, and we are so proud to honor and recognize Peter Courtney with the 2024 *Award for Inspirational Aging*.



New Loomis Spaces...

Residents at all three communities had long-awaited the completion of improvement, expansion, renovation, and construction projects to beautify and enhance the many places where we live, work, and play in our Loomis homes. 2024 witnessed the completion of many of these projects which are already “opening doors” to better welcome, engage, and entertain residents, families, and friends alike at Applewood, Loomis Lakeside at Reeds Landing, and Loomis Village.



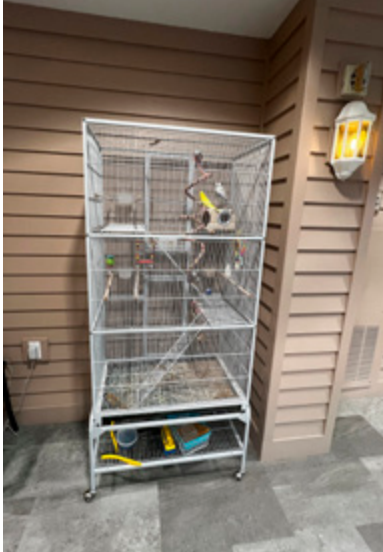
New apartments, refurbished entrance and lobby, renovated and enlarged library, new meeting, gathering, and entertainment space, and newly landscaped grounds headlined the work at Applewood...



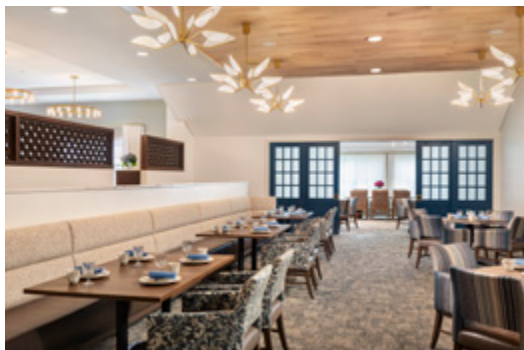
To Live, Learn, Relax, and Play!



The Mezzanine at Loomis Lakeside at Reeds Landing was fully renovated and reopened to become the new assisted living neighborhood and the training ground for our new *SAIDO Learning and OpenView* pilot programs, with many spacious areas to gather, relax, and play...



Loomis Village welcomed newly renovated entrance and lobby spaces including the library, sun room, concierge desk, offices, lounge area, and upstairs renovations to the dining room, private and casual dining, and new billiards room...



Community Outreach

With the goal of having The Loomis Communities' residents and team members be a more active and integral part of life in the Pioneer Valley, the Community Outreach Committee (COC) is delighted to report the following successful and impactful activities in support of non-profit organizations and charitable efforts across the region in 2024.

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 / Pioneer Valley Walk to End Alzheimer's**
- **Amherst Survival Center / "Empty Bowls"**
- **Center for EcoTechnology** (EcoBuilding Bargains)
- **Cooley Dickinson Hospital**
- Christmas Toy Collections
- **Food Bank of Western Massachusetts**
- **Friends of South Hadley Seniors / South Hadley Council on Aging**
- **The Gray House**
- **John J. Duggan Academy**
- Mitten and Sock Drives to support local schools and churches
- **Mount Zion Baptist Church**
- **Salvation Army**
- South Hadley and Granby food bank, **Neighbors Helping Neighbors**
- Springfield **Open Pantry Community Services**
- Springfield Pharmacy Toy Drive
- **Springfield Rescue Mission**
- **St. Jude's Ranch**
- **Suez Temple & Court**

Committee Members:

Residents

Betsy Belden
Carolyn Bentley
Karen Bruns
Sharon Dlugosz
Maggie Horn
Rachel Tierney

Team Members

John Anz
Hilary Loftus
Brenda Mendoza
Renee Charbonneau



Residents and team members from all three Loomis Communities came to the Food Bank of Western Massachusetts' new offices and distribution center to learn more about the great work they do, the challenges ahead, and how community partners like Loomis can continue to make a difference in our region to support those less fortunate.



Team members, residents, friends, and family celebrate another successful Pioneer Valley Walk to End Alzheimer's at Holyoke Community College.

Philanthropy Report

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

2024 was another excellent year for both fundraising and friend-raising in all its forms. Improving health and financial climates allowed for the largest and most successful Spring Reception to date in May, as well as greater outreach, advocacy, participation, and response to our Annual Appeal once again. In addition to the strong, critical annual support, we also benefitted from a number of new major and planned gifts to our endowment and facilities.

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

Annual Giving	\$ 141,035
Memorial & Honoree Giving	\$ 1,250
Spring Reception	\$ 52,041
Other Major & Restricted Giving	\$ 97,104
Grants & Special Projects	\$ 8,991
TOTAL CHARITABLE GIFTS	\$ 300,421

The Loomis Communities supporters include:

100% of Board Members

100% of Senior Management and 7 Team Members

45% of Applewood Residents

66% of Loomis Lakeside at Reeds Landing Residents

53% of Loomis Village Residents

45 Businesses and Corporate Donors

51 Friends of The Loomis Communities



Our distinguished honorees and award recipients at Spring Reception: Peter Courtney and Carol Constant.



Three younger generations of the Sanborn family joined us at Loomis Village to dedicate the new Elwin and Annemarie Sanborn Billiards Room made possible by generous gifts by Elwin Sanborn.

Spring Reception

Spring Reception 2024 was held on Wednesday, May 22nd and returned to the newly renovated lobby and function rooms at Loomis Village. Wonderful food, fellowship, music, and award presentations highlighted this year's event – the largest ever! Most importantly, critical monies were raised for the OpenView program and cognitive health initiatives being developed for all three Loomis communities.

Thank you to our 2024 Spring Reception Sponsors and Donors for their generous spirit and support.

Business Sponsors

Benefactors ~ \$5,000 +

Mountain View Landscapes and Lawncare
PeoplesBank

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

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

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

Andrew Associates
Atlantic Charter Insurance
C.E. Floyd Company
Lyon & Fitzpatrick
Paul Robbins Associates
Specialized Construction
Springfield Electrical Co.

Gold ~ \$500 - \$999

Aladco Linen Service
B-G Mechanical Service
CBIZ | MHM
Hackworth Systems
Health New England
HJ Sims
Holyoke Millwork & Lumber Co.
Mercier Carpet Service
Northern Tree Service
PIP Marketing, Signs, Print
Richco Janitor Service
St. Germain Investments
Westfield Bank

Silver ~ \$250 - \$499

Adam Quenneville Roofing & Siding
Altus Dental
Forastiere Family Funeral & Cremation
Geriatric Medical
Miracle Method of Western Mass
Perkins Eastman
Veryl's Automotive Service

Bronze ~ Up to \$249

Braman Termite & Pest Elimination
Industrial Mechanical Insulation Corp.
Lee Audio 'N Security
Liquor Town
T. J. Conway Company

Individual Donors

Jeanne Achille
Carol Albano
Fran Barney
Sandy and Betsy Belden
Denise Bertolotti
Laura Berzofsky
Don Bliss
Robert Boilard
Kathy Bowler
Edward Breau
Paul Breen
Casey Clark
Peter Courtney and Debby Perry
Roberta Crowell
Ron and Sharon Dlugosz
Judith Donovan and
Wesley Weidemann
Paul and Judith Dobosh
Julie Dwight
Mary Falk
Lynne Forbes
Stephen and Daphne Hall
Jean Hazen
Maggie Horn
Randy and Karen Hyvonen
Claire James
Carol and Brad Katz
Susan LaBonte
Todd Lee and Karen Dalton
Noreen Little
Curt and Janet Mandeville
Gail Markley
Barbara Mason
Edith McEvoy

Ann McIntosh
John and Emily Pietras
Ken and Anne Powell
Michelle Rice
Carol Roberts
Satya Sastry
Whitney and Susan Scott
Shirley Steiner
Louise Sterling
Betsy MacMillan Stevens
Holly Taylor
Trudi Temple
Rachel Tierney
Anne Wing
Ron and Maureen Ziembra
Roger Zimmerman



Founders Society & WSLLS

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



Founders Society

ANONYMOUS
Peter and Marlene Connor
Dorothy (and Joseph) Gavin
Arthur (and Elizabeth) Gionti
Beverly (and Robert) Henneman

Eleanor Parke
Felix Salzano
Art (and Barbara) Stanley
Alex and Barbara Stetynski

Founders Society Legacy Members

ANONYMOUS (2)
Henry Allen and Edith Perman-Allen
Phebe Amsden
Harold and Ruth Bailey
Christine Balch
Edward Bayon
Albert Berkowitz
Diana Bliss
Priscilla Carter
Jack Clarke
Carol Craig
Barbara Curtis
Frank Fowler
Ralph Fowler
Timothy Fowler
Horace and Eloise Fuller
Ilva Funke
Sonja Goodwin
Theodore Green
Mahat Guest
Joan Hafey
Elizabeth Haig

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

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



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

Honor Roll of Contributors

William S. Loomis Leadership Societies

Visionary (\$10,000 and above)

Sanford and Elizabeth Belden 5
Peter and Marlene Connor 5
Estate of Thomas Tamblyn

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

ANONYMOUS (2)
Michael and Linda Costello
Marc and Diana Meiches
Mountain View Landscapes
PeoplesBank 20
Lucinda and Thomas Willemain

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

John and Elizabeth Armstrong 5
Baystate Health
Edith Fabos 5
Chase, Clarke, Stewart & Fontana /
Goss & McLain Insurance Agency 25
Vard Johnson and Ruth Purtilo
Loomis Lakeside at Reeds Landing Craft Fair
Valerie Parsegian
Ellen Pashall
Sodexo Seniors
Springfield Pharmacy
Tsomides Associates

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

ANONYMOUS (3)
Andrew Associates
John and Brenna Anz
Atlantic Charter Insurance
Ruth Barney
Deborah Buckley
C.E. Floyd Company
Seunghye Cha and Anthony Bishop 5
Claudia Considine
Robert Cunningham
Fletcher and Elizabeth Davis
Barbara Denley
Ronald and Sharon Dlugosz
Stephen and Judith Ellenburg 5
Sally Fenix
Elliott Fortescue 10
Stephen and Daphne Hall
Maggie Horn 5
Jan and Bob Keefe
Sue LaMastro and Art James
Sara Lawrence 15
Todd Lee and Karen Dalton
Loomis Lakeside at Reeds Landing
Fund / CFWM
Loomis Village Craft Fair

Lyon & Fitzpatrick
Paul and Margaret Mantoni 20
Edith McEvoy
John and Judith Mullin
Mimi Murray and Nancy Meyer
Jerome and Nancy Myers 10
Eloise Nickerson
Edith Peter
Janet Potash
Donald Poulin
The Puri Family
Paul Robbins Associates
Katherine and Raymond Sawyer
Linda Scheffler
Lois Schwab 5
Smith Brothers Insurance
Specialized Construction
Springfield Cultural Council
Springfield Electrical Company
Philip and Nancy Standel 5
Joan Steiger 25
Richard and Theresa Weston 5
Sarah White
John and Nancy Wilson
Anne Wing

Annual Fund Giving Clubs

Gold (\$500 - \$999)

ANONYMOUS (6)
Aladco Linen Services
Roger and Glenna Ball
B-G Mechanical Service
Roger and Susan Beer
William Bixby
Robert Boilard
Linda Bowman
Albert and Mary Breton
Robert Bucknell 5
Eugenia Burn
Luther Carpenter and Marilyn Nelkin
CBIZ | MHM
Albert and Janet Chevan 5
Ursula Coleman
Rona Conrad 5
Dianne Conway 5
Peter Courtney and Deborah Perry
D.J. St. Germain Company
Easthampton Savings Bank
Judith Fiorentino
Robert and Marsha Gillette
Linda Gordon 5
Hackworth Systems
Health New England
Herbert J. Sims and Co.
Holyoke Millwork and Lumber Co.
Elaine Ironfield
Michael Jarry
Sheila Klem 5

Robert and Constance Law
Gail Markley
Mercier's Carpet Service
Lenore Miller 5
Janice Morrisette
Northern Tree Service
Helene Opocensky
Harriet Pollatsek
Lilian Randall
Richco Janitor Service
Janet Roper 10
Whitney and Susan Scott
Thomas Senecal
South Hadley Cultural Council
Michiko Spector
Mary-Anne and John Stearns
Christine Sulborski
Gennifer Sussman
Mark and Lori Todd
Sigrid Tracy and Adrienne Kimball
Janet and Graeme Veitch
Stephen Wall
Meridith Weiderman 5
Westfield Bank
Richard Whiting, Jr.
Roger Zimmerman 5

Silver (\$250 - \$499)

ANONYMOUS (4)
Adam Quenneville Roofing & Siding
Altus Dental Insurance Company

Josephine Bellew 5
Carolyn Bentley
Vidor Bernstien
Yvonne Cherry 5
Dianne Clinton 5
Lynne Coffin-Prince
Sylvia Cook
Donald and Honore David
Jerilyn Doherty
Nancy Eddy
David and Priscilla Ferrell
Forastiere Family Funeral & Cremation
Wayne and Marilyn Gass
Geriatric Medical
Beverly Henneman
Harold J. Henry Jr
Ann Heropoulos
Ann Hooke
Margaret Horsnell
Whiting and Helene Houston
Randall and Karen Hyvonen 5
Claire James
Bill and Carol Johnston
Erik and Diane Kjeldsen 5
Ronald Loescher
William and Kathleen Woods Masalski
April Mastrangelo
Mary Jo Maydew 10
Miracle Method of Western Mass
Barbara Murphy 10
Katherine Naughton

Thank you for your generous financial support of The Loomis Communities in 2024!

Joanne Omang
 Maureen O'Toole **5**
 Adam Pallant
 Esta Pekow **5**
Perkins Eastman
 Robert Perkins **5**
 Clara Rodrigues
 Kristin Ronan
 Sandra Rowley
 Peter and Suzanne Sanborn **5**
 John and Charlotte Schechter
Smith and Son Jewelers
 Deborah Snow
 Marcia Spencer **5**
 Margaret Stevens
 Alice Swift
 Lynne Tabor and Pinky Hope
 Holly Taylor
Veryl's Automotive Service
 Barry Waite
 Max Winters
 Nancy Young
 Shirley Zimmerman

Bronze (\$100 - \$249)

ANONYMOUS (12)
 Jeanne Achille
 Douglas Adler
 Carol Albano
 Marguerite Anastasovites
 Frances Barney
 Ann Beardsley
 Geraldine Berenson
 Denise Bertolotti
 Barbara Blank
 Ron Blume
 Mary Boulais
 Anna Boulden
 Kathleen Bowler **10**
Braman Termite and Pest Elimination
 Paul and Elizabeth Breen
 Anne Cann
 Richard Cezarek
 Joanne Cioch
 Casey Clark **10**
 Shirley Conant
 Susan Cramer
 Brian Craven
 Roberta Crowell **5**
 Anne and Scott Daniels
 John and Alice Dinger
 Donald Donihue
 Katherine Duclos **5**
 Alan Eccleston and Linda Harris
 Mary Falk
 Linda Farmer and Kim Matland
Healey Family Charitable Trust
 Lorna Fitch
 Lynne Forbes **15**
 Matthew Giroux **10**
 Linda Gonneville
 Phyllis Gracki

Norman and Marion Halpern
 Jeffrey Hayden
 Jean Hazen
 Beth Healy
 Ken and Joan Henrikson
Industrial Mechanical Insulation Corp.
 George Jones
 Albert Kalmbach
 Beatrice Kaplan
 Carol Katz
 Paul and Cynthia Lambert
 Kristen Lamoureux
Lee Audio 'N Security
 Diane Liebert and Paul Cooper
 Lorraine Lis
Liquor Town
 David Longworth and Jo-Ann Davis
 Curtis and Janet Mandeville
 Arthur and Elaine Mange
 Barbara Mason
 Katharine McGovern
 Ann McIntosh **15**
 Leonard Melnick
 Tom and Elaine Mitchell
 M. Pauline Nowell
 Maurice O'Shea
 Jeanne Otto
 Anita Page
 John and Emily Pietras **5**
 Leland and Sylvia Pollock
 Anne and Ken Powell
 Thomas Pratt
 Carol Roberts
 Judith Ryan
 Felix Salzano **15**
 Eileen Santer **5**
 Eleanor Santos
 Satya Sastry
 Patricia Schifferli **5**
 Enid Sichel
 Jeffrey Sophinos and Patricia Yi
 Rita Starzyk and Drew Darnell
 Shirley Steiner **5**
 Betsy MacMillan Stevens
 Trudi Temple
 Michael Thorpe
T. J. Conway Company
 Margaret Trase **5**
 George and Anne Valli
 Patricia Varney
 Ann Weickert **10**
 Wesley Weidemann and Judith Donovan
 Laurie White
 Carolyn Wills
 John Wollensak
 Angela Wright
 Marian Wright
 Patricia Wright
 Ronald and Maureen Ziemba
 Heather Zoeller

Friends (Up to \$99)

ANONYMOUS (2)
 Sandi Albertson-Shea
 Matthew Audette
 Sandra Barbeau
 Laura Berzofsky
 Donald Bliss
 Virginia Brewer
 Sandra Carlson
 Carol and Richard Constant **15**
 Kathleen Cowles
 Harry and Catherine Craven
 Patricia Crutchfield
 Paul and Judith Dobosh
 Julie Dwight
Groundswell Charitable Foundation
 Barbara Hamann
 Elizabeth Howlett
 Pamela Jones
 Arlene Kline
 Paul and Linda Kolodny
 Robert Kuklis
 Susan Labonte
 Hilary Loftus **5**
 Angelo Mazzocco
 Ann McNeal
 Donald Miner
 JoAnne O'Neil **10**
 Eleanor Parke **15**
 Dorothy Perrella
 Michelle Rice
 Robert Robertson
 Alice Roumas
 Marion Schmidt
 Katherine Sordillo
 Rachel Tierney **10**
 Leonard and Ellen Von Flatern
 Greta Walker
 Nancy Wilson

Gifts In Kind

Elizabeth Cahn
 C.E. Floyd Company
 Aila Erman
 Arthur Mange
 Jane McGinnis
 Janet Potash
 Randy Prescott
 Robert Schleif
 Jane Shohan
 Robert and Jackie Tuthill

- 5** Five or more years of continuous giving
- 10** Ten or more years of continuous giving
- 15** Fifteen or more years of continuous giving
- 20** Twenty or more years of continuous giving
- 25** Twenty-five or more years of continuous giving



Gifts in Memory and Honor

Gifts in Memory of...

Gilda and Gerald Balboni

Laurie White

Richard Bentley

Carolyn Bentley

Nissan Bernstien

Vidor Bernstien

John Wilson

Ralph Blank

Barbara Blank

Diana Bliss

Donald Bliss

Lucille Breen

Paul Breen

David Brown

Anonymous

David Burnham

Sarah White

Ann Cann

Albert Chevan

Rigney Cunningham

Robert Cunningham

Fletcher Davis

Valerie Parsegian

Dorothy Dempsey

Ann McIntosh

Bill and Mary Dillon

Curtis Mandeville

Edward Edler

Anonymous

Ruth Eleris

Dianne Clinton

Larry Gonneville

Linda Gonneville

Teresa Harris

Claire James

M. Pauline Nowell

Steven Hastings

Ken and Jean Henrikson

Mary Kalmbach

Leonard and Ellen Van Flatern

Bob and Barbara Keith

James Johnston

Charles Klem, Jr.

Sheila Klem

Elizabeth Lambert

Paul Lambert

Jim Mitchell

Holly Taylor

Nancy

Ronald Loescher

Nancy Nieske

Anonymous

Owen

Eileen Santer

Regis Perkins

Robert Perkins

Elwin and Annemarie Sanborn

Peter Sanborn

Don Sibley

John Wilson

Dr. Donald Sukeney

Edith McEvoy

Rachel Tierney

Jeanne Achille

Vincent

April Mastrangelo

Everett Wall

Stephen Wall

Nelson Weideman

Meridith Weideman

David Wills

Carolyn Wills

Harry Wolfe

Scott Daniels

Gifts in Honor of...

Carol Constant

Kathleen Cowles

Peter Courtney

Claudia Considine

Mimi Murray

Sally Fenix

Nick Fiorentino

Judith Fiorentino

Loomis Village Team Members

Maureen O'Toole

Loretta Pallant

Adam Pallant

Joan Steiger

Angela Wright

Tami

Barbara Hamann

Bev Weeks

Linda Bowman



Financial Report

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

Consolidated Balance Sheets

(as of December 31, 2024)

Assets	2024	2023
Current assets:		
Cash and cash equivalents	\$ 11,420,324	\$ 5,556,556
Accounts receivable - residents, net	1,147,266	1,204,465
Accounts receivable - other	1,448,818	1,121,607
Prepaid expenses and other assets	404,046	427,280
Total current assets	14,420,454	8,309,908
Assets limited as to use	8,592,609	15,077,497
Investments	43,324,208	38,398,666
Property and equipment, net	55,043,493	49,433,004
Right-of-use asset, operating lease	1,410,571	1,409,206
Beneficial interest in perpetual trusts	1,363,296	1,272,994
Total assets	124,154,631	113,901,275
Liabilities and Net Assets		
Current liabilities:		
Accounts payable	\$ 1,711,497	\$ 1,239,194
Accrued expenses and other current liabilities	1,864,866	3,368,760
Current maturities of bonds and mortgage notes payable	1,335,416	1,353,992
Current portion of refundable entrance fees	9,426,864	9,227,338
Total current liabilities	14,338,643	15,189,284
Long-term liabilities:		
Bonds and mortgage notes payable, net of current maturities	19,114,810	20,474,712
Deferred entrance fees, net	16,695,323	15,701,865
Refundable deposits	1,012,170	1,273,150
Refundable entrance fees	57,714,552	52,769,574
Operating lease liability	1,658,223	1,661,009
Liability under charitable gift annuities	34,849	59,692
Total long-term liabilities	96,229,927	91,940,002
Total liabilities	110,568,570	107,129,286
Net Assets:		
Without donor restrictions	7,885,019	1,457,076
With donor restrictions	5,701,042	5,314,913
Total net assets	13,586,061	6,771,989
Total liabilities and net assets	\$ 124,154,631	\$ 113,901,275

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

The Loomis Communities Investments

(as of December 31, 2024)

General Investments and Other Unrestricted funds \$ 22,516,175

Board Designated Endowment \$ 13,536,624

Used according to the Endowment Spending Policy established by the Board of Directors.

Loomis House Proceeds Fund..... \$ 2,928,346

Restricted for the repayment of debt or the construction of certain health care facilities.

Barbara Sheldon Trust \$ 2,337,003

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

Other Designated Funds \$ 1,641,551

- 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.
- e. Belden Resident Engagement Fund-Principle restricted. Earnings are used for resident engagement opportunities at Loomis Village.

Arlottie Potts and Louise Merritt Endowment Funds..... \$ 1,363,296

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

Wright Charities \$ 2,080,364

Board designated, four percent of this 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 \$ 101,379

Applewood General Fund \$ 142,281

Loomis Village Friendship Funds..... \$ 112,931

Not principal restricted, available to support Loomis Village residents whose financial resources are not adequate to pay their regular fees.

Loomis Lakeside at Reeds Landing Philanthropic Fund \$ 565,270

Not principal restricted, available for staff scholarships, resident assistance funds and other purposes that will benefit the residents of Loomis Lakeside at Reeds Landing.

Loomis Lakeside at Reeds Landing Memorial Reserve Fund \$ 554,470

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 \$ 32,385

Permanently endowed fund, held at the Community Foundation of Western Massachusetts for the benefit of Loomis Lakeside at Reeds Landing.

Financial Performance

	<u>2024</u>	<u>2023</u>
Total Operating Revenues without Donor Restrictions	30,086,628	27,702,480
Expenses:		
Salaries and Benefits	14,612,376	13,579,334
Supplies and Other	10,266,750	10,237,886
Depreciation and Amortization	3,973,861	3,879,265
Total Expenses	28,852,987	27,696,485
Operating Gain (Loss)	1,233,641	5,995
Non-Operating Revenues	5,580,431	6,286,190
Net Gain (Loss)	6,814,072	6,292,185
Days Cash on Hand	687	572
Reserve Ratio (1)	2.28	2.29
Debt Service Coverage Ratio (2)	6.24	3.53

NOTES:

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

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

Your support helps assure that The Loomis Communities:

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

Gift Designation:

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

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

Check:

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

Credit Card:

Online credit card gifts are accepted on our secure website at www.loomiscommunities.org. Click on *Support* on the home page, and then *Make a Gift*.

Securities:

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

IRA Distributions:

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

Bequests:

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

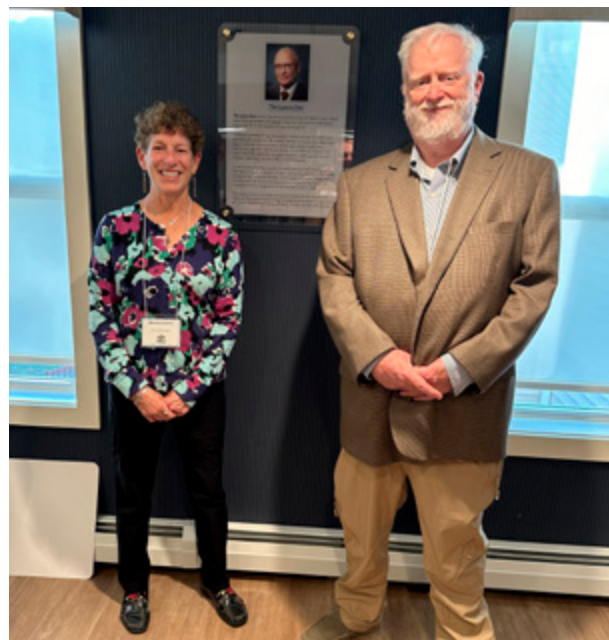
Entrance Fee Refund Designation or Annuity:

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

Do you need more information?

Please contact John Anz

Director of Development and Community Engagement
(413) 532-5325 or janz@loomiscommunities.org





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

www.loomiscommunities.org

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

