



Family not only need to consist of merely those whom we
share blood, but also for those whom we'd give blood

CHARLES DICKENS



Heath Alliance
for Care, Inc.

ANNUAL REPORT 2023

MESSAGE FROM THE PRESIDENT



PETER R. VAN BRUNT
President, Board of Trustees
HEATH ALLIANCE FOR CARE, INC.



**Heath Alliance
for Care, Inc.**

On behalf of the entire Board, I am pleased to share this annual report with you. It is hard to believe that this year marks my 25th year serving as a Trustee. While I have seen many changes during my tenure, the one constant I have always found is the commitment of the staff, the residents and my fellow Board members to making our community the absolute best. It has been and continues to be an honor to be a part of the Heath Village family.

This year, Heath Alliance for Care has overseen several changes to our communities. First, it was with a heavy heart that we announced the closing of Canterbury Village, our small assisted living facility located in West Orange, New Jersey. This decision was a difficult one; certainly, one of the hardest the Board has had to make in recent years. We commend the leadership of CEO and Executive Director Mary Ellen Bove in overseeing this challenging process. We wish to also thank the staff who demonstrated such kindness and empathy toward the impacted residents and their family members.

At Heath Village, we were pleased to open Hickory Lodge, the last remaining long-term care household at the Meadows. We also continued to move forward with our strategic planning for the development of Phase II of Heath Village West. We hope to be able to share exciting new developments on this project in the coming year.

Finally, 2023, once again, showed Heath Village to be a vibrant and progressive community, one in which more than 30 residents chose to make their new home. As usual, we also introduced new activities and programs while embracing our favorite traditions such as Family Day and the Friendship Fund Benefit Gala.

Together with my fellow board members, I look forward to making the coming year a great one.

Wishing everyone a happy and healthy 2024.



BOARD OF TRUSTEES

THERESA BORZELLI, ESQ.

Mendham

Attorney at Law, Retired

HAC TRUSTEE

MARY ELLEN BOVE

Bedminster

*Chief Executive Officer,
Heath Alliance for Care, Inc.
Executive Director, Heath Village, Inc.*

HV TRUSTEE

ROBERT BURNS

Columbia

*Managing Director
Marsh & McLennan Companies*

HAC TRUSTEE

WILLIAM (TIM) CARPENTER, JR.

Verona

HAC ASSISTANT SECRETARY

ROBERT GALLAGHER

Hackettstown

Pharmacist, Retired

HAC VICE PRESIDENT

HV TRUSTEE

L. ALLISON GARDE, ESQ.

Morristown

Attorney

HAC TRUSTEE

HV TRUSTEE

NORRIS HORN

Mendham

*Artegraft, Senior Vice President & Chief
Financial Officer, Retired*

HAC ASSISTANT TREASURER

HERBERT W. KORTE, JR.

Mendham

Senior Bank Officer, Retired

HAC SECRETARY/IMMEDIATE PAST

PRESIDENT

HV TRUSTEE

HAROLD S. LAPPIN, MD

Hackettstown

Ophthalmologist, Retired

HAC TRUSTEE

HV SECRETARY/TREASURER

CAROL MCKINNEY

Hackettstown

NPO Executive, Retired

HAC TRUSTEE

HV CHAIR

STEPHEN SOMERS

Hackettstown

Head of Technology

Vigon International

HAC TRUSTEE

TIMOTHY STEWART

Chester

Economist, Retired

HV VICE CHAIR

PAUL TOMKINS

Essex Fells

Financial Consultant

PRT Consulting, LLC

HAC TREASURER

PETER R. VAN BRUNT

Long Valley

HAC PRESIDENT

HV TRUSTEE

HAC = Heath Alliance for Care, Inc.

HV = Heath Village, Inc.



Back Row (Left to Right): Timothy Stewart, Peter R. Van Brunt, Harold S. Lappin
Middle (Left to Right): Carol McKinney, L. Allison Garde, Robert Gallagher, Mary Ellen Bove
Front Row (Left to Right): Theresa Borzelli, Tim Carpenter, Norris Horn

FROM THE DESK OF

THE CHIEF EXECUTIVE OFFICER

It is hard to believe that we are coming to a close on the year 2023. Time certainly goes by fast.

I am grateful to say that this year, as we had hoped, Covid-19 has mostly drifted into the background of our lives. While we must all remain mindful about exposure, between the development of new medications and vaccinations, we can—and have—resumed our pre-Covid lives.

This year Heath Village invested a great deal of time planning for and thinking about how it can continue to meet the growing and diverse needs of the region's senior population. We are on the cusp of what many are calling the "Silver Tsunami," the year when millions of baby boomers begin to turn age 65. Our market research clearly shows the need and desire for senior housing, particularly in northwest New Jersey. As a result, our community needs to be positioned for meeting both the lifestyle preferences and health care needs of these retirees.

Thankfully, Heath Village has more than 55 years of experience on which to rely. We have always been a progressive, mission driven community focused on providing seniors with the highest quality of living. This remains our focus as we continue to plan for new independent living on the Heath Village West campus as well as other services and amenities important to new retirees.

In other news, this year we made several improvements to our upper campus, including a new patio and grill area. With the help and enthusiasm of our resident hikers, the nature trails on campus were also enhanced and improved. Both the trails and the community garden are extremely popular with retirees who are looking for a future home with outdoor amenities. We were also very pleased this year to be able to open the sixth and final household at the Meadows.

The Friendship Fund is always at the heart of our fundraising efforts and we continue to explore new ways to grow the Fund so that it will always be available to our residents when they need it most. This year's Benefit Gala in support of the Clarence W. Sickles Friendship Fund raised more than \$90,000. We are incredibly grateful for the residents, family members, vendors and friends for their support.

In closing, I would like to thank my entire Heath Village family for their constant support and partnership. It is a privilege to serve our amazing residents. I am truly blessed to have by my side a dedicated and hardworking staff and thoughtful Board of Trustees.

I look forward to continuing our work in the coming year.



MARY ELLEN BOVE
Chief Executive Officer
HEATH ALLIANCE FOR CARE, INC.
Executive Director
HEATH VILLAGE, INC.

Heath Village Memberships and Affiliations

American College of
Health Care Administrators
American Society on Aging
Generations United
Hunterdon County
Chamber of Commerce
International Association
of Homes and Services
for the Aging
Leading Age
Leading Age of New Jersey
& Delaware
Morris County
Chamber of Commerce
Somerset County
Business Partnership
Sussex County
Chamber of Commerce

MESSAGE FROM THE PRESIDENT RESIDENTS' COUNCIL



Back Row (Left to Right): Frank Hinchy, Alan Cooper, Paula Benson, Michael Aron

Front Row (Left to Right): Judy Summers, Maria Moch, Carmel Bourneuf

Missing from photo: Richard Kline, John Madden and Skip Vilas

There are many things about Heath Village that make it special but one that stands out to me is the significant role that the Heath Village Residents' Council plays in our community. Organized in 1967 with the approval of the Heath Village administration and Board of Trustees, the Council represents the voice of the residents and it has played a pivotal part in establishing many of the amenities and services that make our community such a special one.

The Residents' Council consists of nine residents. The 2023 Executive Committee includes President, Frank Hinchy, Vice President, Alan Cooper, Treasurer, Dick Kline and Secretary, Maria Moch.

The remaining council members are Paula Benson, Special Events Chair, Carmel Bourneuf, Newcomers Chair, John Madden, Maintenance and Operations Chair; Judy Summers, Dining Services Chair, and Skip Vilas, Friendly Visitors Chair. Resident Michael Aron serves as the Council's liaison to the Board of Trustees.

The Residents' Council and committees meet once each month, except for July and August. Council meetings are attended only by members of the Residents' Council, administration representatives and a Trustee of the Board. However, all residents are encouraged to attend committee meetings.

In addition, two other committees exist to help the council. They are the Nominating Committee and the By-Laws Committee. Both are chaired by the Residents' Council Vice President.

Thank you to my fellow residents who serve on the Residents' Council or on a committee. Serving on the Council is extremely rewarding. I encourage all residents to consider participating.

Finally, on behalf of the residents and the council members, I wish to take this opportunity to thank the employees of Heath Village who take such good care of all of us. Their hard work and dedication is much appreciated.

FRANK HINCHY
President, Residents' Council

Heath Village Groups & Organizations

- Art Group
- Bells of Heath
- Bible Study
- Billiards
- Bingo Volunteers
- Board Games (Rummikub, Scrabble)
- Bocce League
- Book Discussion Group
- Bridge Club
- Card Clubs (Bridge, Pinochle, Canasta, Poker, Quiddler)
- Cornhole
- Dining Services Committee
- Exercise Programs (Fitness over Fifty, Balance and Core, Chair Yoga, Pilates, Cardio Drumming, Seasonal Water Aerobics)
- Faith Chapel Hostesses & Pianists
- Friendly Visitors
- Friendship Center Pen Pals & Volunteers
- Golf Club
- Great Courses Series (History/Science/ Art/Music/Travel)
- Greeters
- Heath Village Gardeners
- Heath Village Voices (Choir)
- Karaoke
- Library Volunteers
- Mahjong
- Maintenance and Operations Committee
- Mutual Support Group
- Needle Workers
- Trinity's Friendship Circle
- Ping Pong
- Rosary Circle
- Shuffleboard
- Special Events Committee
- Stage Crew
- Vespers Volunteers
- Village Shoppe Volunteers
- Walking/Hiking Club
- Women's Association
- Woodworking
- Worship Service



FAMILY DAY

Family Day, one of Heath Village's most anticipated annual events, was, once again, an enormous success. This year's theme was *Under The Boardwalk, Down By The Sea at the Village Pier*. There was live music and entertainment, a petting zoo, carnival games and rides, and delicious boardwalk treats. The opportunity to have the friends and family of both residents and staff celebrate our shared love for Heath Village is priceless. Children of all ages could be found laughing and having a wonderful time!



FINANCIALS

HEATH ALLIANCE FOR CARE, INC. CONSOLIDATED BALANCE SHEET FOR 2023 VS. 2022

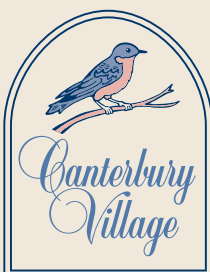
BALANCE SHEET	ASSETS	
	2023	2022
Current Assets	\$9,114,190	\$11,767,801
Investments	19,688,248	16,777,754
Property & Equipment (Net)	64,673,937	68,441,874
Other	2,787,461	1,202,377
Total Assets	<u>\$96,263,836</u>	<u>\$98,189,806</u>

LIABILITIES & FUND BALANCE

Current Liabilities	\$5,862,576	\$5,668,215
Long Term Liabilities	43,773,762	45,361,733
Total Net Assets	46,627,498	47,159,858
Total Liabilities & Net Assets	<u>\$96,263,836</u>	<u>\$98,189,806</u>



Heath Alliance
for Care, Inc.



EMPLOYEE MILESTONES

40 YEARS



DIANE HORNER
Heath Village
Maintenance

35 YEARS



ELLEN WOOLF
Heath Village
Dining Services



JOYCE KINGSTON
Heath Village
Housing Services

30 YEARS

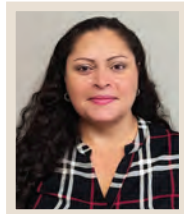


VILMA MAKIN
Heath Village
Nursing

25 YEARS



MARA BRYAN
Heath Village
Nursing



PAOLA FALLAS
Heath Village
Nursing

5 YEARS

MELISSA CIRCELLI
Nursing

JAMES CODISPOTI
Dining Services

RICHARD DANNER
Dining Services

MARIE DORCEUS
Nursing

LORI HEZEL
Nursing

CLAUDIA RAGLIEVICH
Nursing

STEPHANIE RUTTER
Dining Services

MAXMILA SHANGA
Nursing

CAROLYN WEISS
Dining Services

20 YEARS



SHAWN GEIGER
Heath Village
Maintenance



MARIA GUZMAN
Heath Village
Nursing



GINA MARTINEZ
Heath Village
Nursing



GLADYS ROJAS
Heath Village
Nursing



YEVHENIYA SVYDA
Heath Village
Nursing



NICOLE VICTORELLA
Heath Village
Nursing

15 YEARS



MELANIE AIELLO
Heath Village
Business Office



CORONA DAWSON-AMOAH
Heath Village
Nursing



DANIELLE LOVENBERG-PANGALLO
Heath Village
Social Services



JANET MASSENARO
Heath Village
Housekeeping



WILMARIE VILLANUEVA
Heath Village
Dining Services

10 YEARS



DIANE ANTLEY
Heath Village
Rehabilitation



FIOLOMENA LASCANO
Heath Village
Nursing



JILLIAN MINOR
Heath Village
Rehabilitation



ADRIANO MERCENE
Heath Village
Nursing



JAMAL NADIR
Heath Village
Housekeeping



STANLEY RUSSELL
Heath Village/
Grounds

Missing Photo: *Gail Harrison*, 10 Years—Canterbury Village/Nursing



CANTERBURY VILLAGE



Sadly, we share with you the news that this year, Heath Alliance for Care made the difficult decision to close Canterbury Village, our small assisted living facility located in West Orange, New Jersey.

Heath Alliance for Care has had responsibility for Canterbury Village for close to 30 years. It has always been financially independent from Heath Village. During the pandemic, like many communities, the facility received few new admissions, and the census dropped significantly, causing Canterbury to draw upon its investments to meet its financial obligations.

As census continued to drop, we decided to sell the facility a year ago. There was a sale pending that fell through this past spring, resulting in a facility with an even lower census and quickly dwindling assets from which to draw. As a result, the Board made the difficult choice to close the facility and assist the residents in finding new homes. This process was completed in July.

This was not a simple decision. Having worked in the senior living industry for more than 35 years, I know this happens but I can assure you it never gets easy. I, personally, was involved with notifying families and helping to make sure that every resident found a new home—not just any home—but the very best one for them.

During its long history, Canterbury’s staff always provided residents with the highest quality of care. This commitment never wavered, even during those hard last few weeks. In recognition of their dedication, we made certain to do whatever we could to assist impacted staff members.

An unexpected silver lining to closing Canterbury is our ability to transfer their licensed beds to Heath Village. We are currently exploring how this opportunity can help us bring assisted living to the campus.

Mary Ellen Bove, LNHA
CEO & Executive Director

MARY ALICE HORN

This year on July 12, the Heath Alliance for Care family lost long-time Board Member Mary Alice Horn. Mary Alice joined the Heath Village and Heath Alliance for Care Boards in 2012. During her tenure, she always took her Board and Committee assignments very seriously. The needs of the residents were always paramount to her when making any decisions. Her wonderful sense of humor and generous spirit will be greatly missed.

“A thoughtful and kind woman, Mary Alice was a friend to me and a valued board member. I am grateful for her years of service and her dedication to Heath Village and our residents,” said Heath Alliance for Care CEO Mary Ellen Bove.



Mary Alice graduated with an education degree from Molloy College and obtained her master’s in education from Adelphi University. She taught at St. Joseph Catholic School in Mendham for 25 years. She was an active member of the Church of St. Joseph in Mendham, where she served as a lector, Eucharistic Minister, and with the Bethany ministry.

She is survived by her loving husband of 55 years, Norris Horn, son Bill Horn and two grandchildren.



MISSION STATEMENT

PHILOSOPHY:

Heath Alliance for Care, Inc. is dedicated to providing seniors with a full range of care, services and opportunities in a secure, dignified, spiritually fulfilling and stimulating environment.

PURPOSE OF CORPORATION:

Heath Alliance for Care, Inc., a not-for-profit New Jersey corporation*, develops, manages and/or provides consulting services to senior care programs, senior housing, and long term care facilities.

The chief focus of Heath Alliance for Care, Inc. is to provide a full range of care and services which includes, but is not limited to, retirement communities, residential health care and nursing home properties, Alzheimer's care, social adult day care centers and intergenerational child care.



**Heath Alliance
for Care, Inc.**

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E-mail: info@heathvillage.com
Facebook: www.facebook.com/heathvillage**

*Heath Alliance for Care, Inc. is a not-for-profit corporation organized pursuant to the New Jersey Nonprofit Corporation Act (N.J.S.A. 15A:1-1 et seq.) recognized by the Internal Revenue Service as a tax-exempt charitable organization pursuant to Section 501(c)(3) of the Internal Revenue Code of 1986, as amended.