

“The great thing in this world is not so much where we stand, as in what direction we are moving—we must sail sometimes with the wind and sometimes against it—but we must sail, and not drift, nor lie at anchor.”

—Oliver Wendell Holmes Sr.



Heath Alliance for Care, Inc.

ANNUAL REPORT 2025



Peter R. Van Brunt
President, Board of Trustees
HEATH ALLIANCE FOR CARE, INC.

Message From THE PRESIDENT

This year, The Board of Trustees and our leadership team focused on expanding services and advancing our strategic growth plan to ensure Heath Village remains the retirement community of choice. Our efforts included significant planning and investment in the evaluation of future initiatives.

Construction is well underway to convert Heath House into a Comprehensive Personal Care/Assisted Living residence, with completion and licensing expected in Spring 2026. We are also evaluating the benefits of a proposed campus expansion that would add 140 independent living units and a new clubhouse with enhanced amenities across from our current campus. We look forward to continuing the development process this coming year.

In 2025, we proudly celebrated the five-year anniversary of The Meadows, our Nursing and Rehabilitation facility. The Meadows continues to boast a five-star rating with the Centers for Medicare and Medicaid (CMS) rating and recognition as High Performing by *U.S. News & World Report*—placing us among the nation's top skilled nursing communities.

With the dedication of our staff, Board of Trustees, partners, and residents, we remain committed to advancing our mission in meaningful ways. Thank you for your continued support, and best wishes for a happy, healthy 2026.



Heath Alliance for Care, Inc.



BOARD OF TRUSTEES



Left to Right: Robert Burns, Herb Korte, Norris Horn, Harold Lappin, Mark BahnuK, Tim Carpenter, Timothy Stewart, Peter Van Brunt, Robert Gallagher
Seated: Theresa Borzelli, Mary Ellen Bove *Missing from Photo:* L. Allison Garde, Chris Knaus

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

MARK T. BAHNUK

Hackettstown
 Commercial Loan Officer
 Provident Bank
HAC TREASURER

ROBERT BURNS

Columbia
 Managing Director
 Marsh & McLennan Companies
HAC TRUSTEE

WILLIAM (TIM) CARPENTER, JR.

Verona
HAC ASSISTANT SECRETARY

ROBERT GALLAGHER

Hackettstown
 Pharmacist, Retired
HAC TRUSTEE
HV CHAIR

L. ALLISON GARDE, ESQ.

Morristown
 Attorney
HAC TRUSTEE
HV CHAIR

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**

CHRIS KNAUS

Long Valley
 Financial Planner
 Edward Jones
HAC TRUSTEE

HAROLD S. LAPPIN, MD

Hackettstown
 Ophthalmologist, Retired
HAC TRUSTEE
HV SECRETARY/TREASURER

TIMOTHY STEWART

Chester
 Economist, Retired
HAC VICE PRESIDENT
HV VICE CHAIR

PETER VAN BRUNT

Long Valley
HAC PRESIDENT

HAC = HEATH ALLIANCE FOR CARE, INC.
HV = HEATH VILLAGE, INC.

FROM THE DESK OF THE CHIEF EXECUTIVE OFFICER

2025 was an exciting year for Heath Village as we continued to work towards our strategic goals of expanding our current campus, ensuring all levels of care are available and providing state-of-the-art amenities for all Heath Village residents.

This past year we completed Phase One of our conversion of Heath House to Comprehensive Personal Care/Assisted Living. Initial feedback has been very positive and when completed, the new Assisted Living Neighborhood will include 37 thoughtfully designed studio and one-bedroom apartments. It will also include new dining and activity spaces as well as a beautiful roof-top patio with outdoor seating for residents to enjoy. We anticipate licensing of this area in Spring of 2026.

We are working with an experienced development team to assist us in developing an expansion of our community to include 140 independent living apartments and villas and additional indoor and outdoor amenities. This project will also include upgrades to many of the current public spaces on the existing campus.

This expansion is planned across the street from our existing campus, and includes a 24,000-square-foot clubhouse, offering an expanded gym and exercise areas, an area to exhibit art, clinic space and even a pet wash station. The property will also include additional walking trails and birding opportunities for our nature lovers. Heath Village West will offer all our residents – current and future – more ways than ever to have fun, stay active and enjoy new social and educational opportunities.

The 2025 Benefit Gala in support of the Clarence W. Sickles Friendship Fund raised nearly \$130,000, the most ever for the event. The Fund speaks directly to the heart of the Heath Village mission and our pledge to care for our residents when they need it most. Thank you to the many residents, staff, family members, business partners and friends for their generous donations.

In closing, I want to express my sincere gratitude for the opportunity to work alongside such a dedicated staff and thoughtful Board of Trustees. It is truly a privilege to collaborate with them in service to our wonderful residents.

I look forward to continuing our work in the new 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 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): Kathy Grundy, Gary Summers, Bill Blaskopf, Judy Vogel
Front Row (Left to Right): Pat Zimmerman, Dick Kline, Carmel Bourneuf,
 Paula Benson, Judy Summers

The Heath Village Residents' Council plays a significant role 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. It has played an important part in establishing many of the amenities and services that make our community such a unique one.

The Residents' Council consists of nine residents. The 2025 Executive Committee includes President Paula Benson, Vice President, and Treasurer, Dick Kline and Secretary, Pat Zimmerman.

Due to some untimely circumstances, the Executive Committee underwent significant changes in May of 2025. The names listed are those who took over after the passing of two important

people on the Council Frank Hinchy who was President and Alan Cooper who was Vice President. They are sorely missed.

The remaining council members are Judy Vogel, Special Events Chair, Carmel Bourneuf, Newcomers Chair, Gary Summers, Maintenance and Operations Chair, Judy Summers, Dining Services Chair, and Kathy Grundy Friendly Visitors Chair. Resident Bill Blaskopf serves as the council's liaison to the Board of Trustees.

The Residents' Council meets once each month, except for July and August. Council meetings are attended by members of the Residents' Council, administration and a Trustee of the Board. Other residents are invited to attend by invitation.

Twice a year, in the Spring and Fall, all the residents of Heath Village are invited to attend a general meeting, sponsored by the council. These meetings are informational and informative because we usually hear from our Executive Director who gives an update on the Heath Village Community.

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

The Treasurer is also responsible for managing the Employee Appreciation Fund. The fund offers residents the opportunity to thank the staff who take such good care of us every day and to salute them for their hard work. It was created in response to Heath Village's strict no "tipping" policy. This year, we are excited to announce that thanks to Dick's leadership more money was raised for the Fund than ever before.

I became President in an exceptional way and served out the year as interim. However, with the election of new officers, I am now the President for the next three years. I am grateful for the support of all the council members and the administration for this honor.

PAULA J. BENSON

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 and Volunteers
 Great Courses Series
 (History/Science/Art/Music/Travel)
 Greeters
 Heath Village Gardeners
 Library Volunteers
 Mahjong
 Maintenance and Operations Committee
 Grief Support Group

Needle Workers
 Trinity's Friendship Circle
 "Par-Tee," Three Hole Pitch-n-Putt Golf Club
 Ping Pong
 Rosary Circle
 Shuffleboard
 Special Events Committee
 Stage Crew
 Village Shoppe and
 Friendship Store Volunteers
 Walking/Hiking Club
 Women's Club
 Woodworking
 Worship Services
 (Catholic, Episcopal, Methodist)
 Writer's Workshop

HARD TO SAY GOODBYE

This year brought with it bittersweet announcements from two of our dedicated and long-serving department heads. Director of Maintenance Diane Horner announced she would be retiring after an incredible 42 years at Heath Village. Her announcement was soon followed by that of Anthony “Tony” Puccio, our Chief Financial Officer, who shared his plans to retire after 25 years.



Diane began her Heath Village career in 1983 in the position of Administrative Secretary to the Executive Director. She was promoted to the position of Maintenance Coordinator in 1991, and in 2007 she assumed the role of Director of Maintenance. During her time in maintenance, she expanded our security and transportation

services, as well as played an integral role in every building project that took place. She managed the renovation and expansion of Mayflower House and the common areas on the second floor of Heath House. Most recently, she oversaw the building of the Meadows and the conversion of Heath House to Assisted Living.



In between these projects, she managed the renovation of nearly every independent living apartment as well as the countless day-to-day maintenance requests that arose in the community. Diane could always be counted on to calmly oversee every challenge, from floods to gas leaks to fire, with quick action and grace.



In 2000, Tony began his career as Heath Village’s Controller. In 2019 his title changed to Chief Financial Officer. During his 25-year career he oversaw tremendous changes at Heath Village. When he arrived, our community was still primarily operating under manual record-keeping systems. He was instrumental in updating our accounting procedures as well as implementing a complete overhaul of our technology. While oftentimes Tony’s efforts fell behind-the-scenes, his financial skills were vital to the expansion of our community.

The “IT guy,” otherwise known as Tony was a role that over the years became a significant part of his responsibilities. Every department relies on some kind of technology that Tony helped implement and manage, especially nursing. He managed about 300 users and more than 150 computers, plus countless other devices such as copiers, postage machines, credit card and point of sale terminals. He also implemented a comprehensive campus-wide Wi-Fi and computer network. Thanks to Tony, Heath Village has advanced far beyond handwritten ledgers and memos.

To say that both Diane’s and Tony’s fingerprints can be found everywhere in our community would not be an overstatement. We are incredibly grateful for their years of exceptional service and wish them a long and happy retirement.

FINANCIALS

Heath Alliance For Care, Inc. Consolidated Balance Sheet for 2025 vs. 2024

BALANCE SHEET	2025	2024
Current Assets	6,236,691	\$6,765,580
Investments	25,608,531	22,573,493
Property & Equipment (Net)	60,605,129	58,913,020
Other	2,564,362	3,373,776
Total Assets	<u>\$95,014,713</u>	<u>\$91,625,869</u>

LIABILITIES & FUND BALANCE

Current Liabilities	\$7,018,968	\$5,522,661
Long Term Liabilities	40,856,394	38,101,347
Total Net Assets	47,139,351	48,001,861
Total Liabilities & Net Assets	<u>\$95,014,713</u>	<u>\$91,625,869</u>



Heath Alliance
for Care, Inc.



HEATH
VILLAGE

2025 EMPLOYEE MILESTONES



35 YEARS

Emma VanDoren
Nursing



30 YEARS

Norma Thomas
Nursing



James Forestiere
Maintenance



Lucinda Hayes
Nursing



25 YEARS
Anthony Puccio
Chief Financial Officer



Samantha Quick
Business Office



Esmeralda "Sonia" Rebaza
Dining



Ozlem Bicer
Mayflower



Edith Circelli
Nursing



Maria "Charo" Drown
Dining



Maria Gallegos
Housekeeping



Cathy Stukes
Activities



Oksana Taletska
Dining



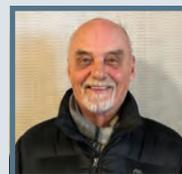
Antonio Asis
Rehabilitation



Carlo Blandura
Mayflower



Claudia Mosquera
Nursing



William Mullen, Jr.
Maintenance



Nora Orozco
Nursing



MaryAnn Perez
Mayflower



Alyssa Capone
Nursing



Pamela Emisiko
Nursing



Clara Garrido
Maintenance



Danielle Gould
Rehabilitation



John Heins
Dining



Iryna Maksymiv
Mayflower



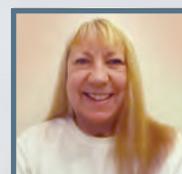
Karen Megill
Human Resources



Pinky Mojak
Nursing



Melissa Nichols
Housing



Brenda Sadlon
Nursing

5 YEARS

Brandy Freiley
Georgina Gray-Horsley
Fany Machuca-Gamez
Amy Mason
Patrick McDonough

Abigail Mensah
Michael Montana
Monica Twenewaa
Lynette Wintz
Jaihan Yip-Ying

10 YEARS

FAMILY DAY FUN

Family Day, one of Heath Village's most anticipated annual events, was outstanding once again this year. This year's theme was *Let's Go Wild!* There was live music & entertainment, pony rides, amusement rides, delicious food and much more! New this year was the bumper cars which were enjoyed by everyone, especially our residents. What makes Family Day so special is the unique opportunity it presents for residents and employees to come together with one another and their own families. And like every year prior, children of all ages could be found laughing and having a "wild" time!



CELEBRATING 5 YEARS!

It was at the height of Covid on a cold and snowy day five years ago in December 2020 when Heath Village opened its brand-new, state-of-the-art, Nursing and Rehabilitation facility, the Meadows. Today, it stands with a Five-Star rating with Centers for Medicare and Medicaid (CMS) as well as ranked High Performing by the *US News & World Report*, the highest possible rating. There can be no doubt that the Meadows has significantly improved the quality and access to health care not only for our residents, but for seniors living throughout the region.

Over the course of these five years our caring and dedicated staff at the Meadows has provided the highest quality of care to more than 1,600 patients in need of short and long-term care. We would like to express our sincere thanks to the staff for their hard work and peace of mind they provide for residents and families alike.



MISSION STATEMENT

Philosophy:

Heath Alliance for Care, Inc. is dedicated to providing senior adults with a range of care, services, facilities and opportunities that ensure security, dignity, spiritual fulfillment and mental/physical stimulation to clients.

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 and Alzheimer's care.



Heath Alliance for Care, Inc.

430 Schooley's Mountain Road, Hackettstown, NJ 07840
Tel: (908) 852-4801 Fax: (908) 852-3748

Website: www.heathvillage.com
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.