

55TH

ANNIVERSARY

Heath Alliance
for Care
joins
Heath Village
in celebration
of its
55th
Anniversary

Annual Report
2021



March 1965
Heath Village
Groundbreaking

Coming together
is the beginning,
Keeping together
is progress,
Working together
is success.



April 1995
Heath Village, The Orchard



October 1983
Heath Village Expansion



August 2018
Heath Village, The Meadows

MESSAGE FROM
The President



On behalf of the entire Board, I am pleased to share this annual report with you. While the year 2021 presented challenges to our Heath Alliance for Care family due to the continued impact of the Coronavirus on our communities, we are hopeful about the future.

The Board would like to commend the entire management team for their hard work during this difficult chapter in our history. We wish to especially thank our Chief Operating Officer and Administrator Mary Ellen Bove for her continued leadership and guidance. The pandemic has required all of us to do our jobs differently and respond to unexpected circumstances. Our most dedicated staff performed admirably.

Despite the hardship presented by the virus, the year had many highlights. Heath Village



HERBERT KORTE
President, Board of Trustees
HEATH ALLIANCE FOR CARE, INC.

celebrated its 55th Anniversary and it welcomed close to 40 new residents. It also celebrated the one-year anniversary of the Meadows Nursing & Rehabilitation Facility. Canterbury Village welcomed new staff members and resumed many activities.

Together, both communities vaccinated hundreds of residents and employees. We were especially thankful to see the

return of many of our resident activities and special events. Village life, we are happy to report, has begun to resemble our pre-pandemic world.

Finally, the Board wants to take this opportunity to express its gratitude and very best wishes to our long-standing Chief Executive Officer and Heath Village Executive Director Patrick Brady who announced his retirement, effective December 31, 2021. For 34 years, his steadfast and thoughtful guidance has helped lead the way. Heath Village would not be what it is today without him. He will long be remembered for his commitment to the residents.

We look forward to writing the next chapter of the Heath Village story with Mary Ellen at the helm as our new CEO and Executive Director.

Best wishes to everyone for a very healthy and safe New Year.



**Heath Alliance
for Care, Inc.**

Board of Trustees

THERESA BORZELLI, ESQ.

Mendham

SES ESOP Strategies
Stevens & Lee, Attorneys at Law
HAC VICE PRESIDENT

PATRICK BRADY

Clinton

Chief Executive Officer,
Heath Alliance for Care, Inc.
Executive Director, Heath Village
CV SECRETARY/TREASURER
HV TRUSTEE

ROBERT BURNS

Columbia

Managing Director
Marsh & McLennan Companies
HAC ASSISTANT SECRETARY

WILLIAM (TIM) CARPENTER, JR.

Verona

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HAC TRUSTEE
CV CHAIR

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Pharmacist, Retired
HAC TRUSTEE
HV TRUSTEE

L. ALLISON GARDE, ESQ.

Morristown

Attorney
HAC TRUSTEE
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MARY ALICE HORN

Mendham

Educator, Retired
HAC TRUSTEE
HV TRUSTEE

NORRIS HORN

Mendham

Artegraft, Senior Vice President & Chief
Financial Officer, Retired
HAC ASSISTANT TREASURER

HERBERT KORTE, JR.

Mendham

Senior Bank Officer, Retired
HAC PRESIDENT
HV TRUSTEE

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Hackettstown

Ophthalmologist, Retired
HAC TRUSTEE/IMMEDIATE
PAST PRESIDENT
HV SECRETARY/TREASURER

MICHELE MCCARTHY

Mendham

Associate Director, Global Marketing
Genmab
HV TRUSTEE

CAROL MCKINNEY

Hackettstown

NPO Executive, Retired
HAC SECRETARY
HV CHAIR

DAVID SCHRECK, MD

Sparta

CEO
Acute Medical Management Inc.
HAC TRUSTEE

ARTHUR SHENINGER

Oxford

Elementary School Principal, Retired
HV TRUSTEE

TIMOTHY STEWART

Chester

Economist, Retired
HAC TRUSTEE
HV TRUSTEE

MARK TOMKINS

Caldwell

Management Consultant
Tomkins and Associates, LLC
HAC TRUSTEE
CV VICE CHAIR

PAUL TOMKINS

Essex Fells

Financial Consultant
PRT Consulting, LLC
HAC TREASURER
CV TRUSTEE

PETER R. VAN BRUNT

Long Valley

Moderne Partners, LLC, Retired
HAC TRUSTEE
HV TRUSTEE

HAC = Heath Alliance for Care, Inc.

HV = Heath Village, Inc.

CV = Canterbury Village



Standing (L-R): Peter R. Van Brunt, Tim Carpenter, Norris Horn, Robert Gallagher, Timothy Stewart, Harold Lappin, Patrick Brady

Seated (L-R): Michele McCarthy, Paul Tomkins, Herb Korte, Theresa Borzelli, Mary Alice Horn, Mark Tomkins

Missing from Photo: Bob Burns, L. Allison Garde, Carol McKinney, David Schreck, Arthur Sheninger

FROM THE DESK OF
The Chief Executive Officer



This year's annual message is a bittersweet one for me, as it will be my last. In September, after much soul searching and long hours of thought, I made the difficult decision to retire from Heath Village at the end of 2021.

Heath Village celebrated its 55th anniversary this year. It has been an honor to have spent 34 of those years at Heath overseeing and growing this amazing community. Throughout the years, I have met some of the most interesting residents and families. To me, Heath Village is home. I have shared this home with some of the greatest staff I could ever imagine. Together, we held true to our guiding principle - residents first, always.

This dedication to residents was never more apparent than it was this year when, like 2020, staff were forced to respond to the impact of the Coronavirus on our community. I am very proud



PATRICK E. BRADY
Chief Executive Officer
HEATH ALLIANCE FOR CARE, INC.

of how quickly and efficiently Heath Village was able to deliver the vaccine, and most recently the booster shot, to our residents and employees. Thanks to these efforts, I am feeling optimistic that we have turned the corner on the pandemic.

It is also important to recognize The Meadows Nursing and Rehabilitation Facility's one year anniversary. Opening a new facility during a pandemic

presented countless obstacles but due to the exceptional leadership of Mary Ellen Bove and a great deal of hard work by everyone at Heath Village, this amazing state-of-the-art health care center is providing the highest quality of care to seniors throughout the region.

In closing, I wish to thank the residents, the Board of Trustees, and all the employees for their partnership and support. I am grateful for the priceless memories of my Heath Village family I am taking with me. I am confident that Mary Ellen in her new position as CEO and Executive Director, along with the help of an incredibly talented and dedicated staff, will continue to make our community one in which we can all be proud to call home. The future is bright for Heath Village.

Thank you for the opportunity to serve you these many years!

Memberships & Affiliations

Leading Age
Leading Age New Jersey
American College of Health Care Administrators
American Society on Aging
Generations United

International Association of Homes and Services for the Aging
Hunterdon County Chamber of Commerce

Morris County Chamber of Commerce
Somerset County Business Partnership
Sussex County Chamber of Commerce

MESSAGE FROM THE PRESIDENT
Residents' Council



Left to Right front row: Paula Benson, William Reidenbach, Carmel Bourneuf, Judy Summers, Michael Aron **Left to Right back row:** Edgar Pittenger, Alan Cooper, William Herling

The Heath Village Residents' Council was organized in 1967 with the approval of the Heath Village Administration and Board of Trustees. In the following years, the council helped establish the community garden, the Village Shoppe, the library as well as managing other special events; all of which made Heath Village the place it is today.

On behalf of the residents and the council members, I wish to thank the employees of Heath Village who have taken such good care of us during the past year. Their hard work and dedication are much appreciated.

The Residents' Council consists of nine residents. The 2021 Executive Committee includes President, Edgar Pittenger; Vice President, Alan Cooper; Treasurer, William Reidenbach and Secretary, Maria Moch.

The remaining council members are Kathy Grundy, Friendly Visitors Committee Chair; Judy Summers, Dining Services Committee Chair; William Herling, Maintenance and Operations Committee Chair; Carmel Bourneuf, Newcomers Committee Chair and Paula Benson, Special Events Committee Chair. The Council Representative to the Board of Trustees is Michael Aron. He attends meetings of the Trustees and helps to keep the Residents' Council informed of issues discussed at these meetings.

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.

I wish to thank all the residents who participate in the Residents' Council and support its functions. I encourage residents to consider serving on the Residents' Council.

EDGAR J. PITTENGER
President, Residents' Council

*Heath Village Resident Groups
& Organizations*

- Art Group
- Arts & Crafts
- Bells of Heath
- Bible Study
- Billiards
- Bingo Volunteers
- Board Games (Rummikub, Scrabble)
- Bocce League
- Book Discussion
- Card Clubs (Bridge, Pinochle, Canasta, Quiddler)
- Exercise Programs (Fitness over Fifty, Balance and Core, Chair Yoga, Healthy Motion Fitness, Seasonal Water Aerobics)
- Faith Chapel Hostesses & Pianists
- Flower Tenders
- Friendship Center Pen Pals and Volunteers
- Genealogy
- Great Courses Series (History/Science/ Art/Music/Travel)
- Heath Village Choir
- Heath Village Gardeners
- Library Volunteers
- Mahjong
- Martha's Friendship Circle
- Mutual Support Group
- Needle Worker's Group
- Ping Pong
- Pitch-n-Putt Golf Club
- Rosary Circle
- Shuffleboard
- Special Events Committee
- Stage Crew
- Vespers Volunteers
- Village Shoppe Volunteers
- Walking/Hiking
- Women's Association
- Woodworking
- Worship Services

55 Years and Counting

Fifty five years ago on October 30, 1966, Heath Village officially opened its doors to seniors in the region. “When I first had the idea for a housing community dedicated to the elderly, people thought I was crazy, but I was not to be dissuaded. I knew it was the right thing to do. Seniors needed a place like Heath Village to call home,” said founder, The late Reverend Clarence W. Sickles in 2017 when asked about the early days when Heath Village was just a dream. “Back then, I couldn’t envision what it is today. It has far exceeded what I had in mind.”

Thanks to Reverend Sickles’ vision and perseverance and the hard work of several other dedicated community leaders, Heath Village stands today as the second oldest senior living community in New Jersey.

“While certainly the pandemic has been difficult, in no way has it undermined the Heath Village story. The resilience demonstrated by both residents and staff during this difficult chapter in our history only stands as further evidence of our community’s strength, dedication, and commitment to serving the region’s seniors for many years to come,” said Patrick Brady, Heath Village Executive Director. “It has been an honor to serve the senior population for 55 years and we look forward to an exciting future that includes building additional independent senior living cottage-style apartments on the property adjacent to the Meadows,” said Brady.



Cutting the ribbon to officially open Heath Village Retirement Community, October 30, 1966.



Vaccination Victory

It is hard to believe that nearly two years have passed since the start of the pandemic. Like 2020, the Coronavirus continued to present challenges for our staff and residents in 2021, but we are happy to report that we are confident things are moving in the right direction.

One reason for our optimism is the successful completion of multiple clinics held during January, February and March resulting in nearly all residents and staff being fully vaccinated. In total, more than 500 residents and staff received the vaccine.

In addition, during October and November, we were also very pleased to be able to offer the booster shot to all residents and staff who wished to receive it.

We are extremely grateful for our residents, employees, family members, vendors, and members of the community who have continued to support us during this difficult time.

Together, with fellowship, kindness and patience, we made it through the pandemic.



Happy Retirement!



After an incredible 34-year career, our CEO and Executive Director Mr. Brady has announced his plans to retire at the end of 2021.

It is hard to believe that during its 55-year history, Heath Village has only had three Executive Directors – our founder The Reverend Clarence W. Sickles, Charles Peters, and finally, arriving in 1988, Patrick E. Brady. Heath Village stands today as one of the finest retirement communities in the state in large part to Mr. Brady’s leadership, strategic planning, hard work, and dedication to serving the senior population.

“I can hardly believe it has been a quarter of a century serving on the Heath boards with Pat Brady. During all that time, I never had a worry that he was anything but the perfect person in the ED/CEO position. Every time I went to a Leading Age national conference, I came away proud that our communities were cutting edge and often years ahead of almost all other facilities, even larger and more expensive organizations. I never want to think that anyone is irreplaceable, but Pat comes as close as anyone I have ever worked alongside. I especially commend him for his support and empowerment of women in leadership roles,” said Carol McKinney, Chair, Heath Village Board of Trustees.

Brady is particularly proud of the Friendship Center. “A retirement community hosting a childcare center with resident volunteers was a novel idea 30 years

ago. Many of my fellow Heath Village board members had doubts about it, but Pat saw it as a plus for the residents and for the children, and he has always liked novel ideas,” said John Reynolds, Friendship Center Founder and Board member. “A thousand or so kids and who knows how many Heath Village volunteers and Pen Pals later, the success of the Friendship Center has proved him right,” said Reynolds.

The Friendship Fund was also a priority for Brady who has worked tirelessly to maintain it. In 1989, soon after his arrival, he organized the inaugural Benefit Dinner. In 1990 he spearheaded the “Gift from the Heart” campaign that raised more than \$500,000 for the Fund. He also created the Friendship Fund Gift Annuity Program which to date has raised nearly \$1.5 million.

“Mr. Brady has been an excellent mentor during my twelve years at Heath Village. I have learned much from him and have always been impressed by his commitment to the community’s residents and staff,” said Mary Ellen Bove, Heath Village Chief Operating Officer and Administrator. “I am grateful for the opportunity I have been granted to succeed him and look forward to building on his legacy,” said Bove.

Best wishes to Mr. Brady for a very happy and healthy retirement.



Canterbury Village



At Canterbury Village, an assisted living facility located in West Orange, New Jersey, our mission is to provide our residents with the highest quality health care delivered with compassion.

While we are still living with the impact of the Coronavirus, we are very grateful for the arrival of the vaccine. All residents and staff were vaccinated in the early months of 2021, and most recently, received their booster shots as well. Vaccination has provided great peace of mind that we have done everything possible to keep our vulnerable residents and our employees safe.



**WILLIAM "TIM"
CARPENTER WILLIAM**
Chair
CANTERBURY VILLAGE

Leading us through the vaccination clinics was our very capable staff including long-time employee Art Dunsmore who retired this year, after 15 years

with Canterbury Village and 25 years within the Heath Alliance for Care family. Joining the Canterbury Village team this year is our new wellness nurse Marie "Emilie" Capalla-Santos.

As our environment became safer, the Village was very happy to welcome back live entertainment and special events such as a Summer Luau. Residents were also able to, once again, enjoy fun outings to places like Verona Park.

The year ended on a positive note as we continue to push past the pandemic, and we look forward to a healthy New Year.



Employee Milestones

30 years



KATHLEEN NOWICKI
Heath Village
Nursing



KELLY STILES
Heath Village
Human Resources



JEANNE KRISTIANSEN
Heath Village
Nursing

25 years

20 years



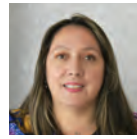
RHONDA DAUM
Heath Village
Housekeeping



NICHOLAS FIALCOWITZ
Heath Village
Grounds



LUIS LEBEL
Heath Village
Housekeeping



JHANNIER MARTINEZ
Heath Village
Nursing



DIANE MCALEER
Heath Village
Housing Services



KEVIN NEWPORT
Heath Village
Grounds



LYUBOV YATSKIV
Heath Village
Nursing

15 years



FLORA BAUTISTA
Heath Village
Mayflower House



MELISSA BUCZKO
Heath Village
Dining Services



SISWINARTI GOBLE
Heath Village
Mayflower House



AGNES NIAMIEIN
Canterbury Village
Nursing



WENDY YOUNG
Heath Village
Nursing

HEATH
VILLAGE
5 years

ADRIENNE ASIS
Dining Services

RICHARD AYRES
Maintenance

AMBER BRADY
Rehabilitation

MELANEA CASTILLO
Housekeeping

PATRICIA CROFCHECK
Nursing

FRANCIS DIBIO
Nursing

MOUSSA GUIRO
Nursing

EDMUND PEREZ
Nursing

SYDNEY VENO
Dining Services

JOHNNA MARRIE VIEJON
Nursing

CANTERBURY
VILLAGE
5 years

JANET CLARK
Administration-Other

NAIMA PINCKNEY
Activities

MISSING FROM PHOTOS:
DALE RUSH
Heath Village, Grounds, 20 years-Retired

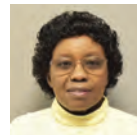
10 years



KELLY CLARK
Heath Village
Rehabilitation



NICHOLAS CRISTO
Heath Village
Rehabilitation



BEATRICE DAVID
Heath Village
Nursing



LEAH GRAUSO
Heath Village
Rehabilitation



MICHAEL HEATH
Heath Village
Housekeeping



MIREILLE JOHNSON
Heath Village
Nursing



GULTEKIN KARAKUS
Heath Village
Maintenance



LOLITA LISANKIE
Heath Village
Social Services



SAM MANNA
Heath Village
Nursing



JONATHAN MANUEL
Heath Village
Rehabilitation



MARIE IGOT
Heath Village
Rehabilitation



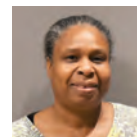
JOSEFINA MORENO
Canterbury Village
Housekeeping



ANTHONY JOHN PANGALILINGAN
Heath Village
Nursing



ERIKA PARRA
Heath Village
Nursing



PAULINE TURNER
Heath Village
Nursing

Financials

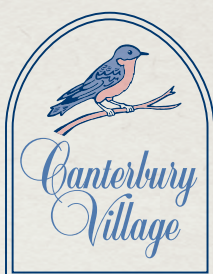
Heath Alliance For Care, Inc. Consolidated Balance Sheet for 2021 vs. 2020

BALANCE SHEET	<i>Assets</i>	
	2021	2020
Current Assets	\$14,007,775	\$22,740,671
Investments	18,842,837	9,398,685
Property & Equipment (Net)	72,647,192	75,211,806
Other	1,039,534	1,056,789
Total Assets	<u>\$106,537,338</u>	<u>\$108,407,951</u>

	<i>Liabilities & Fund Balance</i>	
Current Liabilities	\$6,664,786	\$8,743,940
Long Term Liabilities	50,775,636	56,616,923
Total Net Assets	49,096,916	43,047,088
Total Liabilities & Net Assets	<u>\$106,537,338</u>	<u>\$108,407,951</u>



Heath Alliance
for Care, Inc.



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.