Culture
Communication
Collaboration
Compassion

The 4Cs that will guide our path forward.
The Year in Review

As Duncaster moved beyond the world of COVID-19 and fully embraced the future, 2022 was a year of renewed excitement. Building on the foundation of the work in 2021, we focused on the execution of our strategic plan.

True to Duncaster’s heritage and core values, residents played an integral role in the process. One of the first outcomes of our work was the identification of the words that define Duncaster’s culture: trust, respect, fulfillment and relationships. **Culture** is the first of the 4Cs that will guide our path forward, with the other three being **Communication**,** Collaboration** and **Compassion**.

In addition to this crucial work, Duncaster upgraded the campus with new paint and siding, a new roof and enhanced landscaping. We were also delighted to welcome 32 new residents and several talented employees to the Duncaster campus, including Ross Weiner, vice president of facilities management, and Warren Hamilton, controller.

Duncaster continues to be well positioned for success in a rapidly changing, competitive and dynamic environment. As we continually seek to maintain and share best practices with others, our affiliations with key industry peer groups — Novare and Caring Communities — continue to give us this ability.

Table of Contents

| Leadership Team | 2 |
| Community Highlights | 5 |
| Donors | 9 |
| Financials | 11 |

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**Board of Directors**

Chibueze Okey Agba  
*Mai 2022*  
Susan Aller  
*through October 2022*

Frank Barrett  
Carol Barry  
Brian Clemow  
Yvonne Renee Davis  
Nancy Dean  
Carol Guardo  
*October 2022*

Lenworth Jacobs  
Irmgard Klee  
R. Frederic Knauf  
Deborah Koltenuk  
Philip Schenck  
Noreen Shugrue  
John Shulansky  
Marie Spivey  
John Wheat  
Tom Wood

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**Leadership Team**

**Chibueze Okey Agba**  
Chairman of the Board

**Susan Aller**  
Chairman of the Board

**Frank Barrett**  
President & CEO

**Carol Barry**  
President & CEO

**Brian Clemow**  
President & CEO

**Yvonne Renee Davis**  
President & CEO

**Nancy Dean**  
President & CEO

**Carol Guardo**  
President & CEO

**Lenworth Jacobs**  
President & CEO

**Irmgard Klee**  
President & CEO

**R. Frederic Knauf**  
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**Deborah Koltenuk**  
President & CEO

**Philip Schenck**  
President & CEO

**Noreen Shugrue**  
President & CEO

**John Shulansky**  
President & CEO

**Marie Spivey**  
President & CEO

**John Wheat**  
President & CEO

**Tom Wood**  
President & CEO

**Kelly Papa, President & CEO**

Kelly Papa, MSN, RN, has extensive experience in aging services, including as a director of nursing and a clinical educator, in addition to being a national consultant to dementia care and leadership development programs. Kelly has researched, published and presented on topics that include building learning organizations, creativity in staff development, person-centered care, dementia care, leading change and leadership development.

**Ami Desai, Chief Operating Officer**

Ami Desai has over 25 years of executive leadership experience in senior living, health care management and clinical operations, as well as a background in operations/strategic planning, program development, quality initiatives and hospital/physician relationships. She supports the daily community life of independent living residents and also serves as administrator of the Caleb Hitchcock Health Center at Duncaster.

**Robert Leake, Chief Financial Officer**

Rob Leake brings over 30 years of health care finance experience serving Connecticut’s senior community in various settings — from hospitals to multi-entity corporations. Most recently, Rob served as CFO at Hebrew Senior Care in West Hartford. Prior to being there, he was the director of finance and executive director of hospital services at Masonicare.

**Lisa Greene, Vice President of Sales & Marketing**

Lisa Greene brings over 20 years of sales and marketing experience at The Scotts Miracle-Gro Company, Nestle USA and Procter & Gamble, as well as leadership with local arts and education nonprofit organizations. As a daughter of current Duncaster residents, Lisa has a unique perspective and a personal understanding of the value of a Life Plan Community.

**Heather Stanton, Vice President of Resident Services & Community Life**

In her role, Heather Stanton specializes in creating a culture of active aging. She has worked in the field for the last 17 years and has presented nationally on building active cultures across the continuum, as well as incorporating yoga and movement into leadership development.

**Joseph Tedone, Vice President of Human Resources**

Joe Tedone, PHR, SHRM-CP, brings over 15 years of leadership experience in human resources. Most recently, he was vice president of human resources at the Wheeler Clinic, where he focused on HR systems, benefits, talent development, training and employee relations.

**Ross Weiner, Vice President of Facilities Management**

After retiring as a police officer, Ross Weiner took on facilities management as a second career, managing several large, multi-building senior living campuses. His expertise as a former police officer enhances our awareness of personal security, and his facilities knowledge keeps our buildings and grounds safe and functioning efficiently.
Recognized as the ‘Best’
In May 2022, the Duncaster community learned that it had been recognized by U.S. News & World Report in its Best Senior Living ratings for 2022-23. Duncaster earned “Best” status by achieving the highest possible rating in the Independent Living category.

“Duncaster is proud to have been named one of the best independent senior living communities in the nation, said President and CEO Kelly Papa. “I am grateful to our dedicated staff whose hard work made this award possible, and to the residents of Duncaster who make doing our jobs such a pleasure.”

“Until now, families have had limited information when comparing providers of independent living, assisted living, memory care or continuing care,” said Ben Harder, managing editor and chief of health analysis at U.S. News. “The Best Senior Living ratings fill this informational gap with comprehensive and transparent data to help older consumers and their families identify high-quality senior living communities that meet their needs and preferences.”
Duncaster Stands with Ukraine

As the war continued in Ukraine, we were inspired by the words of Eleanor Roosevelt: “It isn’t enough to talk about peace. One must believe in it. And it isn’t enough to believe in it. One must work at it.”

In support of the needs of the Ukrainian people, Duncaster raised $30,000. On March 14, the Duncaster community wore yellow and blue as a sign of solidarity with Ukrainians, and donations were accepted at a gathering of peaceful reflection. Talida Tetrichko, a Duncaster nurse who is actively involved in Ukrainian-American relief work, shared examples of what is being done in Connecticut to help the people of Ukraine, along with the gratitude and resilience being demonstrated by Ukrainians. Together, we will work toward peace.

Commemorating Juneteenth

Duncaster was honored to be a sponsor of Bloomfield’s inaugural Juneteenth parade and second annual Juneteenth celebration. In addition to the parade, the two-day celebration featured a community cookout, speakers, storytellers, live entertainment and children’s activities.

The Juneteenth holiday commemorates June 19, 1865, the day enslaved people in Texas were emancipated and the process of freeing slaves was complete. Long celebrated in the African American and Black communities, Juneteenth only became a federal holiday in 2021. The racial strife leading to Juneteenth’s designation as a federal holiday is a reminder that there is still much work to be done to promote equality for all Americans, regardless of their color. Emancipation was just the first step on that journey.

Teeing Off for Charitable Giving

Duncaster’s 14th Annual Charitable Golf Tournament took place on Aug. 25, 2022, at Wintonbury Hills Golf Course in Bloomfield. The 2022 tournament was dedicated to the memory of Jeff Fournier, a beloved and caring staff member who passed away earlier in the year. An avid golfer, Jeff played an integral role in planning Duncaster’s annual event.

Every year, participation in Duncaster’s charitable tournament supports the delivery of programs, services and educational opportunities to residents and staff. It also supplements the Community Outreach Fund, which supports local not-for-profit social service organizations that do critical work to support the health and vibrancy of Bloomfield.

Our 2022 event had a record turnout, and we are deeply appreciative to all of our partners and the community for supporting our mission and helping to honor Jeff’s passionate commitment to Duncaster. We extend much gratitude to the management and staff of Wintonbury Hills Golf Course for their generous support and help in making this event a success.
Expanding Community Access to Wellness and Care

Duncaster is proud that Hartford Healthcare Medical Group Geriatric Clinic and Hartford Healthcare Rehabilitation provide on-site services. Building on the long-standing partnership, in 2022, the Hartford Healthcare Rehabilitation Network at Duncaster expanded outpatient services for residents and the greater Bloomfield community. Using a team approach to rehabilitation, patients benefit from skilled therapy services for a variety of medical conditions.

Duncaster offers community seniors a membership to its fitness and wellness program at a minimal cost. Membership includes use of our enclosed year-round swimming and therapy pools as well as numerous fitness classes. Hartford Healthcare’s GoodLife Fitness offers a highly individualized fitness and wellness program under the close supervision and instruction of nationally certified exercise physiologists.

Donors

Thank you to our many supporters and partners for helping to make Duncaster the very special place that it is — a place that brings joy to so many.

**Caleb Hitchcock Health Center Fund**
- Martin & Irene Berman
- Robert Bolgard
- Michael Carey
- Mary Cray
- Joyce Falkin
- Jane Gannon
- Michael & Susan German
- Gordon & Gail Granger
- Gretchen LaBau
- Irene McCabe
- Eileen Noonan
- Ann Oppenheimer
- Libby Pearl
- Richard Renert
- Frank Rief
- David & Karen Seaman
- David & Kathleen Smith
- Judith Stoughton
- Donald & Barbara Trinks
- Lyn Walker
- Richard & Madelaine White
- Susan Wilson
- Suzanne Zajac

**Community Fund**
- Emily Becton
- Irmgard Klee
- Meredith Libbey
- Irene McCabe
- Seymour Reitman
- Dale & Sally Richter
- John Shulansky
- Ruth Shulansky
- Eli & Vera Simon
- David & Kathleen Smith
- Jane Springer

**Employee Education Fund**
- Sally Allen
- Jacqueline Brown
- Thayer & Patricia Browne
- Michael Bzulak
- Joaquin DeChristo
- Norma Fishman

**Endowment Fund**
- Roxanne W. Beardsley Trust
- Nancy Dean
- Joyce Falkin
- Norma Fishman
- Hartford Foundation for Public Giving
- Herbert Hershenson
- Howard & Sheila Mark
- Mary Sargent
- David & Kathleen Smith
- Judith Wawro
- Kenneth Weeks

**Library Fund**
- Emily Becton
- Frances Blumenthal
- Jacqueline Brown
- Jane Carpenter
- Maryann Dowaliby
- Joyce Falkin
- Norma Fishman
- Jane Gannon

**Music & Program Fund**
- Emily Becton
- Jacqueline Brown
- Jane Carpenter
- Thomas Corrigan & Carol Forte
- Janet Eveleth
- Richard & Susan Kramer
- Estelle Laschever
- Seymour Reitman
- Edith Sherman
- David & Kathleen Smith
- Marilyn Stockton
- Susan Wilson

**Residents Assistance Fund (RAF)**
- Sally Allen
- Thayer & Patricia Browne
- Janet Eveleth
- Joyce Falkin
- Gordon & Molly Fowler
- Jane Gannon
- Hartford Foundation for Public Giving
- Rodney & Leigh Hudson
- Estelle Laschever
- Howard & Sheila Mark
- Andrew & Deirdre Poole
- Seymour Reitman
- Dale & Sally Richter

**Petronella Lair**
- Meredith Libbey
- Howard & Sheila Mark
- Seymour Reitman
- Edith Sherman
- Amy Silverman
- David & Kathleen Smith
- Jane Springer
- Marilyn Stockton
- Joanna Virden
- Richard & Madelaine White
- Susan Wilson
### Financials

#### Revenue

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<tr>
<th>Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Resident Service Fee Revenue</td>
<td>$12,006,130</td>
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<tr>
<td>Earned Entrance Fees</td>
<td>$4,349,906</td>
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<tr>
<td>Health Center Revenue</td>
<td>$7,760,554</td>
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<tr>
<td>Assisted Living Revenue</td>
<td>$3,358,413</td>
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<tr>
<td>Other Income</td>
<td>$2,499,012</td>
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**Total Revenue:** $29,974,015

#### Expenses

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
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<tr>
<td>Medical &amp; Other Resident Care</td>
<td>$9,201,904</td>
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<tr>
<td>General &amp; Administrative</td>
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<tr>
<td>Building &amp; Grounds</td>
<td>$4,109,564</td>
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<td>Food Service</td>
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<td>Housekeeping</td>
<td>$1,240,305</td>
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<tr>
<td>Depreciation &amp; Amortization</td>
<td>$3,866,097</td>
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</tbody>
</table>

**Total Expenses:** $29,875,609

#### Change in Unrestricted Net Assets

**Change:** $1,562,837

**Philanthropic Impact:** $1,408,000

- Gifts to The Duncaster Foundation: $363,000
- Gifts to Duncaster Residents Association: $123,000
- *Gifts to Duncaster, Inc.*: $922,000

#### Change in Unrealized Gain/(Loss) on Investments

**Change:** ($2,990,157)

#### Change in Future Service Obligation

**Change:** $0

#### Change in Interest Rate Swap Obligation

**Change:** $1,328,914

*The Duncaster Foundation contributed $596,000 to Duncaster, Inc. based on its Endowment Spending Policy.*

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Thank you to all our donors and supporters!