



Duncaster is where to *live.*



2023 ANNUAL REPORT

2023 Year in Review:

A Year of Growth and Achievement at Duncaster

The year 2023 was one of remarkable accomplishments for Duncaster. As we navigated the journey toward full occupancy recovery, we also welcomed many new Residents into our community, each contributing to the vibrant and dynamic atmosphere that Duncaster is known for.

At the heart of our success this year were the 4Cs—Culture, Compassion, Communication, and Collaboration. These core values were evident in every aspect of our operations and guided us as we unveiled ambitious strategic plans for the future. Among the highlights was the planned renovation of the main building, along with the expansion of independent living apartments and cottages. These initiatives are designed to enhance the living experience for our current Residents while accommodating the needs of our growing community.

In November 2023, we reached a significant milestone by submitting our expansion plans to the town. This step marked the beginning of an exciting new chapter for Duncaster, one that promises to bring even more life and energy to our community. The enthusiasm was palpable as we shared these plans with current Residents and new Charter Members, who are eagerly anticipating their move to Duncaster.

As we reflect on the past year, we are proud of what we have accomplished together and look forward to continuing this momentum in the years to come.



Kelly Papa, President & CEO

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2023 Board of Directors

Chibueze Okey Agba
(May 2022)

Frank Barrett

Carol Barry

Brian Clemow

Yvonne Renee Davis

Nancy Dean

Carol Guardo
(October 2022)

Annie Hildreth

Lenworth Jacobs

Irmgard Klee

R. Frederic Knauft

Deborah Koltenuk

Kelly Papa
President & CEO
ex-officio

Sally Richter
ex-officio

Philip Schenck

John Shulansky

Marie Spivey

John Wheat

Tom Wood

Leadership Team



John Shulansky, Chairman of the Board

John Shulansky, a Certified Dementia Practitioner, has decades of experience in senior living and geriatrics, including more than 10 years as a partner of EldersChoice of Connecticut. He has extensive business and community experience as a member of and consultant to governing boards, C-suites and nonprofits, along with serving as an elected official and entrepreneur.



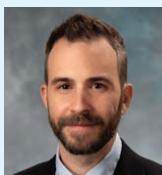
Heather Stanton, Vice President of Resident Services & Community Life

In her role, Heather Stanton specializes in creating a culture of active aging. She has worked in the field for the last 19 years and has presented nationally on building active cultures across the continuum, as well as incorporating yoga and movement into leadership development.



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.



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.



Lisa Greene, Vice President of Sales & Marketing



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.

Golf Tournament

Each year, participation in our charitable tournament supports the delivery of programs, services, and educational opportunities to residents and staff, and 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.

We extend our gratitude to the management and staff of **Wintonbury Hills Golf Course** for their help in making our 2023 tournament a success. We would also like to thank the following **sponsors** for their generous support:

Diamond Sponsors

Brannack Electric
Butler Landscape & Equipment
Carpetworks
I & D Home Solutions
J.P. Carroll Roofing
Otis Mechanical

Silver Sponsors

C.E. Floyd Company
Hartford Healthcare
O'Brien McCarthy Associates
OnePoint Partners
P.J. Lodola & Sons
Right at Home
Shipman & Goodwin
Zeigler

Corporate Sponsors

Assured Partners
Constitution Group of
Wells Fargo Advisors
Fuss & O'Neill

Hospitality Sponsor

Aladco Linen Services

Putting Green Sponsor

Geriatric Medical

Tee Sponsors

Centivo
CLA (CliftonLarsonAllen LLP)
Connecticut Computer Service
Fiducient Advisors
Hinding Tennis Courts
Suburban Pharmacy
Valley Fish Company
Workers' Compensation Trust



Annual Charitable

Golf Tournament

In Honor of Jeff Fournier

September 12, 2023



Donors

Duncaster was again recognized in 2023 as one of the best independent senior living communities in the nation as the recipient of two senior living awards by U.S. News and World Report, one for “Best Independent Living” and one for “Best Continuing Care Retirement Community (CCRC).”



This standard of excellence would also not be possible without the support provided by the **Duncaster Foundation**, the philanthropic heart of our community. We gratefully acknowledge the following donors to the Duncaster Foundation during 2023:

Caleb Hitchcock Health Center Fund

Frank Barrett
Jenefer Berall
Austin & Lynne Carey
Joe & Mary Cosgrove
Steve & Judy Eckhouse
Petronella Lair
Townsend & Caroline Mink
Phyllis Pierson
David & Kathleen Smith
Marie Spivey
Betty Starr

Duncaster Enhancement Fund

Emily Becton
Austin & Lynne Carey
Steve & Judy Eckhouse
Hartford Foundation for Public Giving
Meredith Libbey
Townsend & Caroline Mink
Arlene Parmelee
Phyllis Pierson
David & Kathleen Smith
Marie Spivey
Jane Springer

Employee Education Fund

Sally Allen
Jo-Anne Ansbro
Emily Becton
Robin Bergman
Thayer & Patricia Browne
Michael Bzullak
Austin & Lynne Carey
Joe & Mary Cosgrove
Carolyn D'Alessandro
Joaquim de Cristo
Joyce Falkin
Tony & Anita Ferrante
Hartford Foundation for Public Giving
George & Roberta Glass
Carol Guardo
Ann Hotchkiss

Dianne Jones
Maxine Kates
Frederic & Sarah Knauft
Petronella Lair
Meredith Libbey
Laverne Mahoney
Howard & Sheila Mark
George & Joan McGauley
Townsend & Caroline Mink
Bill & Kitty Moeller
Jane Morris
Marianne Mueller
Phyllis Pierson
Andrew & Deirdre Poole
Anita Satriano
Amy Silverman
John Shulansky
Ruth Shulansky
Marie Spivey
Jane Springer
Ken & Pat Wiley

Employee Memorial Fund

Sumner Bissell
Austin & Lynne Carey
John & Mary Ann Downes
Linda Gerber
Marcia Hincks
Irmgard Klee
Howard & Sheila Mark
Townsend & Caroline Mink
Marianne Mueller
Michelle Press
John Quinn
Dale & Sally Richter
Anita Satriano
Ruth Shulansky
David & Kathleen Smith
Marie Spivey
Jane Springer
Arthur Pembleton & Janet Stott

Endowment Fund

Roxanne W. Beardsley Trust
Sara Cole

Carolyn D'Alessandro
Nancy Dean
Steve & Judy Eckhouse
Joyce Falkin
Hartford Foundation for Public Giving
Herbert Hershenson
Tom & Pam Matthews
George & Joan McGauley
Townsend & Caroline Mink
Ronald Schwartz
Amy Silverman
David & Kathleen Smith
Helen G. Waterman Trust
Sherwood Willard

Library Fund

Emily Becton
Jane Carpenter
Tony & Anita Ferrante
Norma Fishman
Harvey & Lee Goodfriend
Meredith Libbey
Irene McCabe
Townsend & Caroline Mink
Ruth Shulansky
Marilyn Stockton
Richard & Madelaine White
Susan Wilson

Music & Program Fund

Emily Becton
Austin & Lynne Carey
Tony & Anita Ferrante
Thomas Corrigan & Carol Forte
Jonathan & Cornelia Hall
Maxine Kates
Irmgard Klee
Estelle Laschever
Meredith Libbey
Townsend & Caroline Mink
Elaine Savarese
Eli & Vera Simon
Jane Springer
Marilyn Stockton
Ruthan Wein

Residents Assistance Fund

Sally Allen
Jo-Anne Ansbro
Carol Barry
Marjorie Becker
Thayer & Patricia Browne
Joe & Mary Cosgrove
Elizabeth Cronin
John & Mary Ann Downes
Joyce Falkin
Hartford Foundation for Public Giving
Rodney & Leigh Hudson
Anne Hussey
Richard & Susan Kramer
Marcia Krupnikoff
Estelle Laschever
Theresa Levine
Laverne Mahoney
Tom & Pat Matthews
George & Joan McGauley
Townsend & Caroline Mink
Bill & Kitty Moeller
Phyllis Pierson
Andrew & Deirdre Poole
Eli & Vera Simon
David & Kathleen Smith
Beverly Thomas
Jean-Pierre & Marie Claire Van Rooy
John & Karen Wheat
Ronald Yungk

Robert & Susan Fisher
Townsend & Caroline Mink
Andrew & Deirdre Poole
Dale & Sally Richter
Jeffrey Semmer
Nelson & Helen Sly

Herbert Hershenson
Marcia Hincks
Benson & Marcia Horowitz
Donald Hunt
Lenworth & Barbara Jacobs
Dianne Jones
Roberta Kaufman
Deborah Koltenuk
Richard & Kathryn Koubek
Robert Leake
Jean Low
Marsha Mills
Townsend & Caroline Mink
Marianne Mueller
Kelly Papa
Andrew & Deirdre Poole
Michelle Press
Robert & Beverly Raymond
Dale & Sally Richter
Keith Robertson
Mary Sargent
Charlotte Schiff
Barbara Shaw
Joe Shiman
Ruth Shulansky
Amy Silverman
Nelson & Helen Sly
Martin & Charlotte Sornborger
David & Kathleen Smith
Marilyn Stockton
Arthur Pembleton & Janet Stott
Barry Tomlinson
Jacqueline Werner
Tom Wood
Marilyn Woodruff
Maureen Zavatone

Unrestricted Fund

Anonymous
Anonymous
Anonymous
Fiducient Advisors
Susan Aller
Vida Barron
Walter Bernkopf
Frances Blumenthal
Thayer & Patricia Browne
Tom & Ellen Brydges
Ann Bucknam
Austin & Lynne Carey
Brian Clemow
Maureen Coleman
Joe & Mary Cosgrove
Dean & Twila Daniels
Donald Davidson
Joyce Falkin
Robert & Susan Fisher
Norma Fishman
Janet Foisie
Brookside Farm Foundation
Carolyn Fowler
Steve & Nancy Fox
Jane Gannon
Shirley Geer
Jeanne Genovese
Robert & Lee Goode
Harvey & Lee Goodfriend

Restricted Funds

Catherine Ahmad
Anonymous
Mary Burke
Sara Cole

Planned Giving

The following generous donors have made gifts to Duncaster through their will or other formal estate planning designation. They form an enduring part of the Duncaster family. We are proud to recognize them as members of the **John G. Rohrbach Planned Giving Society**.

Anonymous (1) *
Anonymous (2) *
Anonymous (3) *
Anonymous (4) *
Anonymous (5)
Anonymous (6)
Sara Barroll *
Boyce Batey* Living Trust
James Torrey & Lilly Biscoe Torrey *
Judith Brainerd *
Lyman Brainerd *
Jean Brown *
Sarah Butler *
Brian Clemow
John M.K. & Mignon Foederer Davis *
Louise Detrick *

Eva C. Frankfurt *
Patricia Fitt *
Carolyn & Ed* Fowler
Richard P. Garmany *
Annette Gillette *
Robert & Lee Goode
Melissa Hanson *
Dorothea Hawley *
Frances Hennessey *
Ovide & Helen Hogaboom *
Frances Holmes *
David Hubbard *
Charles Kaman *
Janet Krogh *
Marie Kyle *
Sylvia Leven *

Harriet MacGuinness *
Berta Merriam *
Edith Ogden *
Ann Randall *
Philip & Catherine Reynolds
Sali* & John* Riege
Margaret Rochford *
Harriet Ruggles *
Harlow Savage, Jr.* & Ruth Savage *
Dorothy Steinhauer *
Edward Tumarkin
Judith Wawro
Helen Wills *
Helen G. Waterman* Trust
Barbara Woodruff *

(*Deceased)

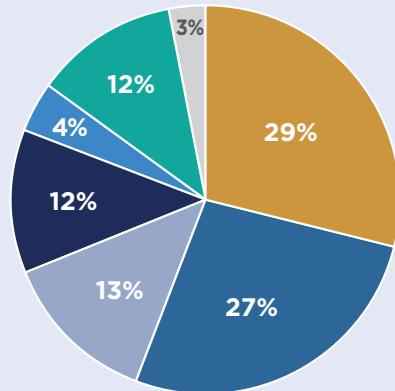
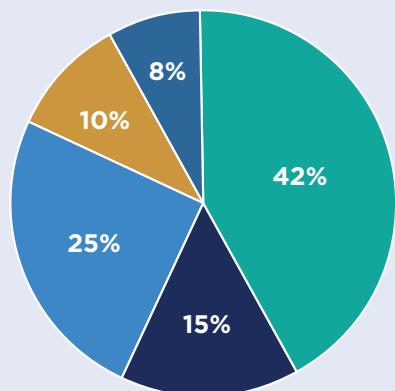
Financials

Revenue **\$29,729,000**

Resident Service Fee Revenue	\$12,481,000
Earned Entrance Fees	\$4,343,000
Health Center Revenue	\$7,504,000
Assisted Living Revenue	\$3,031,000
Other Income	\$2,370,000

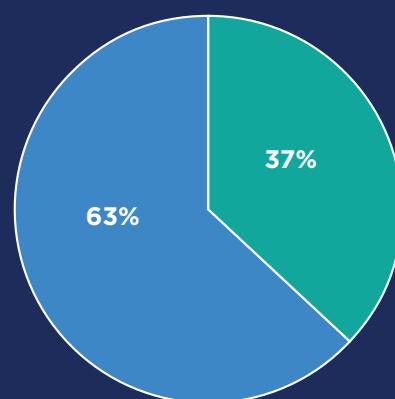
Expenses **\$33,015,000**

Medical & Other Resident Care	\$9,713,000
General & Administrative	\$8,929,000
Building & Grounds	\$4,111,000
Food Service	\$3,926,000
Housekeeping	\$1,222,000
Depreciation & Amortization	\$4,086,000
Interest	\$1,028,000



Philanthropic Impact **\$439,000**

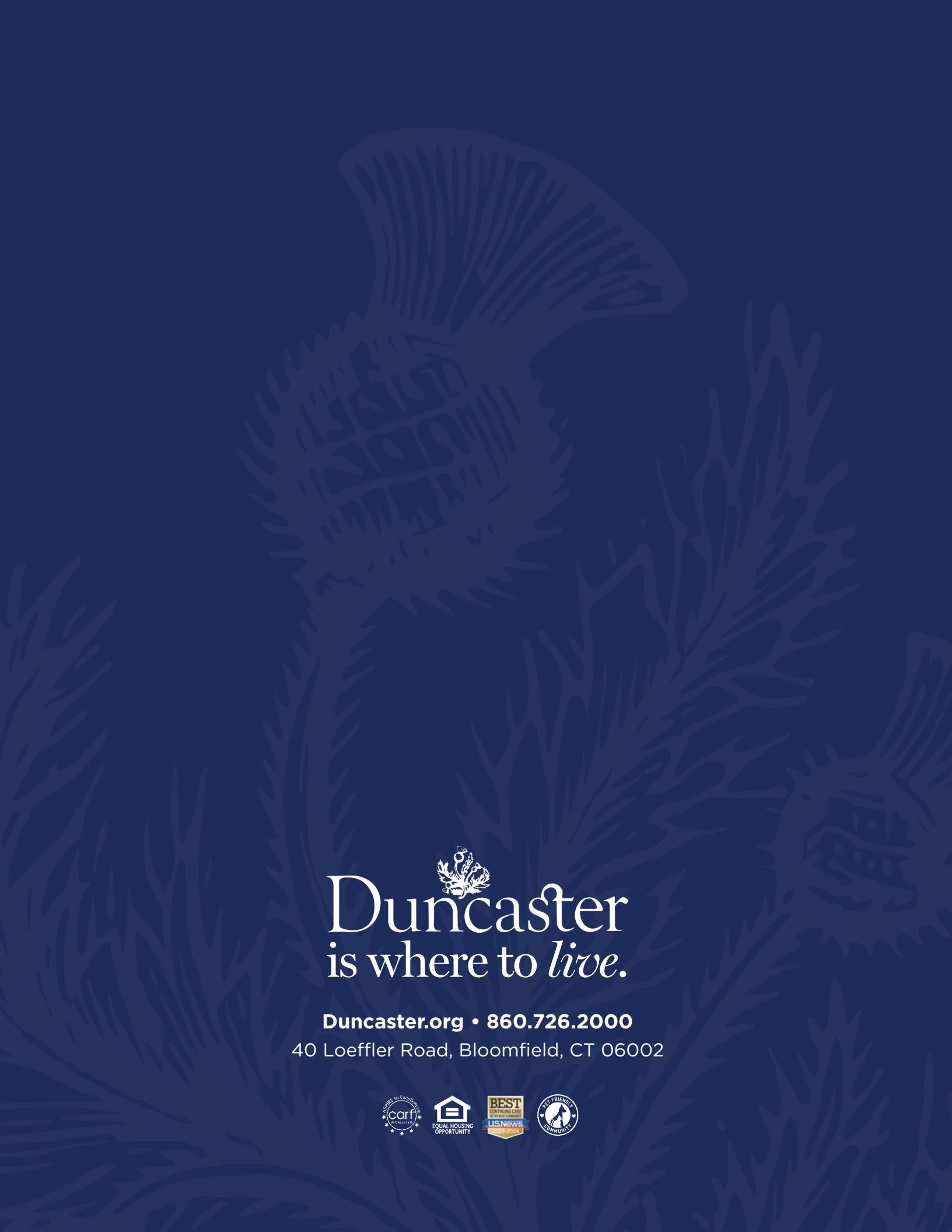
Gifts to The Duncaster Foundation	\$163,000
Gifts to Duncaster, Inc.	\$276,000



Change in Unrestricted Net Assets **\$1,064,000**

Income/(Loss) from Operations	(3,286,000)
Net Realized Gain/(Loss) on Investments	\$2,720,000
Change in Net Unrealized Gain/(Loss) on Investments	\$1,841,000
Change in Future Service Obligation	-
Change in Interest Rate Swap Obligation	(211,000)

Thank you
to all our donors
and supporters!



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Duncaster.org • 860.726.2000
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