





Dear Friends,

s we celebrate 125 years of care and service, we have much to be grateful for. Masonicare has withstood the test of time, growing and evolving to meet the needs of our cherished communities. However, the last decade has presented multiple challenges including a major shift in the utilization of healthcare services. Reductions in revenue, new payer models, rising healthcare costs, legislative scrutiny and a pressured labor market have added substantial challenges to an already highly-regulated and cumbersome industry. As a result, sadly, many healthcare companies have been unable to sustain operations.

Throughout our 125 years of caring, our mission and vision have remained steadfast and our ageless commitment to caring, the center of all we do. However, we are not immune to the impact of an industry in flux. It is imperative that we stay ahead of the curve, working diligently to become more efficient, streamlined and nimble. Over the past three years, we have implemented a number of important changes that have worked to stabilize the organization. These decisions were not easy and were not made in haste. The viability of our organization relies on our ability to adapt. It is our responsibility to preserve the organization, which cares for 4,500 lives and employs 2,000 team members across the state; a responsibility we do not take lightly.

With our strategic plan in place, we were well on our way to what we thought would be a banner year for Masonicare. No one could have anticipated coming face to face with the biggest professional challenge any of us have ever encountered – the COVID-19 pandemic. As an organization, we were forced to quickly pivot. In five short days, corporate services as well as many other employee team members were sent home to work. Information technology was put in place and virtual connections became our

lifeline. On the front lines, our teams of dedicated employees worked tirelessly to keep our residents and family members safe and informed amidst a rapidly changing stream of information. It was perhaps the most telling expression of our commitment to those in our care.

While the COVID pandemic and industry challenges still present a formidable threat, Masonicare continues to work courageously toward sustainability, implementing new models of care and service delivery. The speed of change we see today is, arguably, faster than ever and we are working hard to stay ahead of a rapidly changing environment, ensuring our legacy organization is here to celebrate another century of caring. These are challenging times, but our ability to move forward in the face of adversity has undoubtedly helped us chart a course of enduring strength and solvency.

As we celebrate this milestone, we reflect on those who came before us; those who faced challenges, not unlike our own, but chose to persevere. It is because of their resilience and fortitude that we are here today.

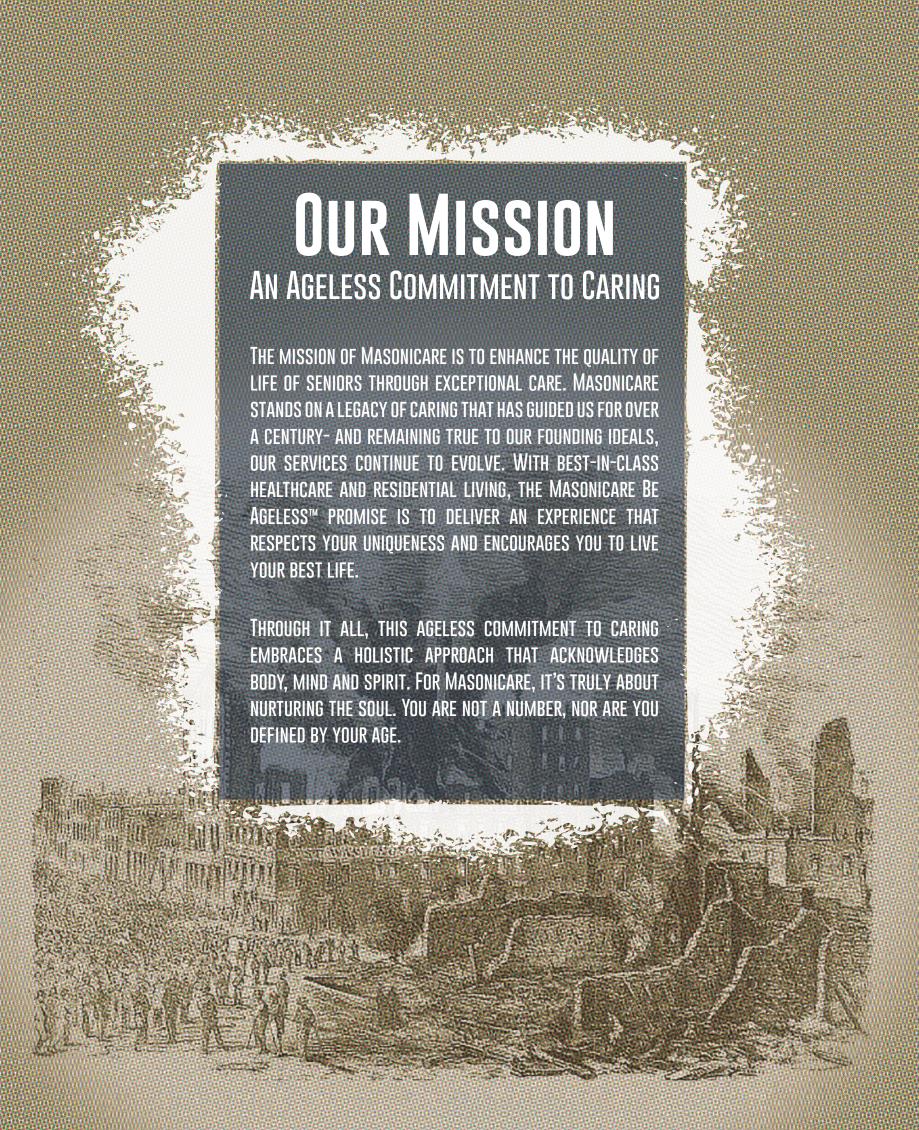
As Chairman and Chief Executive Officer, it is a privilege to serve and we appreciate the responsibility and trust involved in helping shape this great organization. On behalf of the Board of Directors and the Masonicare leadership team, we extend our most heartfelt gratitude to our valued residents, patients, families, providers, and employee team members, for your unwavering support. We are confident that together we will continue to weather the changing tides and emerge a stronger, healthier and more cohesive organization well-equipped to serve our communities for the next 125 years and beyond.

Together, we are #MasonicareStrong

Robert Polito



JP Venoit





Luke Lockwood

THE BEGINNINGS

The Great Chicago Fire of 1871 ignited more than the city of Chicago. It's been said that it was also the spark that started Masonicare. As organizations and individuals across the U.S. rushed to aid the victims of the devastating blaze, the Masons in Connecticut collected over \$1000 in cash plus provisions to help their fellow Masons and the city of Chicago with the rebuilding effort. In a gesture that would be rare today, Chicago returned any surplus to donor groups – including \$332 to Connecticut Masons.

Timing is everything. Luke Lockwood, the attorney and philanthropist who was Grand Master of Connecticut Masons from 1872-1873, had a vision of a home for brethren and widows, especially Civil War widows. Thus inspired, he leveraged that \$332 into what is now the Masonicare continuum.

GROWTH

Established in centrally located Wallingford, CT as The Masonic Charity Foundation of Connecticut, the organization has remained mission-based for more than a century – celebrating its 125th anniversary this year. A hallmark of our history has been the commitment to evolving to meet the needs of those in our care and beyond.

In the 1960s, Masonicare was one of the earliest healthcare providers to be certified for and accept Medicare. Following this milestone, the organization became open to all.

Remaining an open organization, Masonicare welcomes anyone who can benefit from our services, while focusing on those over the age of 55. As a not-for-profit organization, Masonicare is considered a national leader in the field of senior care services. Our team is committed to respecting the uniqueness of each individual, following a holistic philosophy that embraces body, mind and spirit.

At Masonicare, our Mason heritage is an integral part of who we are and our devotion to the Masonic family is unwavering. As a member of the Masonic family in good standing, Masonicare is here for you with many services and benefits. Following the Concentric Circle guidelines for Connecticut Freemasons, relatives and appendant bodies, Masonicare offers priority admission and access to these services.

THE FUTURE

With an engaged, mission-driven workforce, Masonicare is committed to delivering an experience that respects the uniqueness of its residents and patients. "An Ageless Commitment to Caring" has guided Masonicare since its humble beginnings and will continue to drive us forward as we provide best-in-class healthcare and residential living options.

The spark that fueled a two-day long fire in 1871 has propelled Masonicare through two World Wars, The Great Depression, a Worldwide influenza epidemic – to the present day COVID-19 pandemic. As we face one of the most difficult challenges in our 125-year history, it is the strength, resilience and commitment of the organization's leadership and entire workforce that will sustain us for the next century and beyond.

THIS IS MASONICARE.



1870'S

Connecticut Masons contribute \$1,001.12 to Chicago Masons to help rebuild after the Great Fire. Chicago returns a surplus to donors and Connecticut Masons received a \$332 return.

Luke Lockwood, then Grand Master, proposes that the \$332 be used to establish a fund for widows and orphans.

1889-1895

The Masonic Charity Foundation is chartered and incorporated to assist indigent Masons, widows and orphans of deceased Masons.

The first Masonic Home and Orphanage opens, offering 32 rooms.

1915-1919

Construction of a three-story brick unit with kitchen and dining facilities and sleeping quarters begins. The cornerstone, now called Crossover, is laid in September.

The Frank Wilder building replaces the original wooden dormitories. This serves as the main building of the home, housing the auditorium, chapel and several clinics.

1972-1975

The six-story Charles J. Ramage Building is opened with offices on the main floor and 150 resident rooms on the five upper floors.

The David Wooster ninety-bed unit is built.

1983-1986

Ashlar of Newtown, a 156-bed skilled nursing facility officially opens under Masonicare's ownership.

Ashlar Village, a 244-unit, nationally accredited CCRC, officially opens in Wallingford.

Masonicare becomes "open to all" – opening its doors to the community.

1995

Masonicare is "born". The Masonic Charity Foundation of Connecticut reorganizes and creates a new parent company, Masonicare.

The George Sturges Building is renovated to include a new acute care hospital and geriatric medical psychiatric unit.

2008

Masonic Healthcare Center breaks ground on the Kenneth B. Hawkins, Sr. independent living apartments, 36 new one- and two-bedroom apartments, increases the number of licensed beds on the Acute Medical Hospital Unit to serve 30 patients and expands the number of beds on the Geriatric Medical Psychiatric Unit to 29 and begins providing hospice care in private, comfortable rooms in the Acute Care Hospital Unit.

2009

Masonic Healthcare Center becomes Masonicare Health Center; Ashlar Village becomes Masonicare at Ashlar Village;

Ashlar of Newtown becomes Masonicare at Newtown:

Connecticut VNA and Connecticut VNA Partners become Masonicare Home Health & Hospice and Masonicare Partners Home Health & Hospice.

2014-2016

Ground breaks on Masonicare at Mystic, a 179-unit independent and assisted living community.

Jon-Paul Venoit is named President and CEO of Masonicare, succeeding Stephen B. McPherson.

1922-1928

The Grand Lodge authorizes the construction of a four-story brick and concrete hospital building, briefly called the Masonic Home and Eastern Star Hospital then becoming known as the Old South Wing.

390 people are permanent residents of the Home. There are also 22 men and 56 women in the hospital.

1930-1956

The Frank Wilder building is enlarged, adding the Wells wing. This wing includes a rooftop nurses' solarium, which was destroyed by fire the following March.

The Robert S. Walker Memorial Building (Walker Dorm) is erected as a dormitory for 100 female employees. Later becoming a residential care home.

1961-1964

321 residents at a cost of \$10.69/ day for hospital care and \$5.05 for a home member.

The 4-story, 80-bed General George Sturges Wing is added.

The statue titled "George Washington as Master Mason" is placed on the campus of Masonic Healthcare Center.

1997-1999

Masonicare expands its home care services, providing 450,000 patient care visits per year across the state.

Pond Ridge at Ashlar Village opens.

The A. Norman Johnson Apartments and The Leslie G. Wright Residence open in Wallingford, and Lockwood Lodge at Ashlar of Newtown.

2004-2006

Ground is broken for 40 villas at
Ashlar Village and the Hartog
Activities Center. The 50-year old
Walker Dorm and the old Grand Lodge
Building, occupied by the Grand Lodge
of Connecticut since 1930 are both
torn down.

Ground is broken for Notch Hill, a new 78-unit apartment complex and Pond Ridge housing 45 additional assisted living units and 30 units dedicated to memory care.

2007

Ground is broken for the new Grand Lodge building and Medical Office Building.

Bro. William L. Greene, Most Worshipful Grand Master of the Grand Lodge cuts the ribbon to celebrate the official opening of the new Grand Lodge building.

2017

Masonicare acquires Chester Village West, a CCRC comprised of 105 cottages and apartments.

Masonicare signs an agreement to sell Masonicare at Newtown.

Robert F. Polito is named chair of the Masonicare Board of Trustees, succeeding Howard W. Orr, who served for 13 years.

2019

Masonicare unveils its new forwardthinking brand, website and BeAgeless® Philosophy.

Masonicare wins the Meriden Record-Journal Readers' Choice Awards for Best Assisted Living (Masonicare at Ashlar Village), Best Skilled Nursing (Masonicare Health Center) and Best Place to Work (250+).

2020

For the first time, Masonicare begins serving seniors beyond the borders of Connecticut by providing homemaker and companion services in the Westerly, Rhode Island area.

Masonicare celebrates the 125th anniversary of Masonicare Health Center.



JON-PAUL VENOIT A LEGACY OF LEADERSHIP

It's 8:00 AM and Jon-Paul (JP) Venoit has already been in the office for an hour. It's not because he has to be, it's because he wants to be there. You see, JP has been with Masonicare since he was 16 years old — where he got his start working in the dietary department at Ashlar Village, Masonicare's Wallingford-based Residential Living community. JP isn't just a part of Masonicare — it's a part of him; it's in his DNA.

ver three decades, a relentless work ethic, an unshakable commitment to company values and savvy business acumen propelled JP through the ranks eventually landing him the well-earned role of President and CEO. And while it might sound like the fairy tale story, JP's hard work and fierce determination to make Masonicare a household name has kept his feet to the fire.

Building on the legacy of his predecessors, JP has a clear vision for the organization which is now celebrating 125 years of caring. For JP, it's not a job, it's a passion. It's about creating a sustainable, nimble and adaptable organization positioned and prepared to care for people for the next century and beyond. It's an unwavering dedication to an "ageless commitment to caring" that is fueling JP's vision for the future – a future he refers to as the "Next Generation Masonicare".

In four short years in his role as CEO, JP has built a like-minded team and has taken the company through a restructuring and brand evolution that will strengthen the organization and position it for growth. Known as the "people's CEO", he adopts a personable, approachable style and encourages a proactive and engaging workplace environment.

STAYING ON COURSE

For 125 years, Masonicare has served the needs of its communities. The largest non-profit senior care health system in the state, Masonicare offers a full continuum of services ranging from a variety of residential living options to home health care, homemaker companion services, hospice and palliative care, short-term rehabilitation, hospital care, adult daycare, memory care and more. This one-of-a-kind care continuum allows residents to receive all the care they need from the provider they have come to trust. And with a solid strategic plan for sustainability and growth in place, Venoit and team raced full speed into 2020, filled with energy and enthusiasm, only to be stopped in their tracks by what has become the biggest crisis in their professional careers - the COVID-19 global pandemic.

While the Coronavirus pandemic presented and remains a formidable threat, particularly to the frail and immunocompromised, Venoit and his team are working to keep residents and employee team members safe while moving the organization forward, implementing several key restructuring strategies designed to reduce cost and improve care and service.



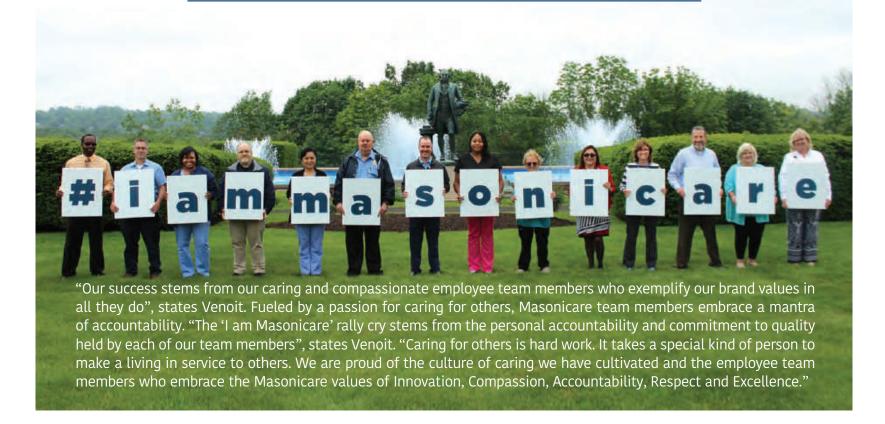


"CARING FOR OTHERS IS HARD WORK.

IT TAKES A SPECIAL KIND OF PERSON TO MAKE A LIVING IN SERVICE TO OTHERS."

Despite the challenge of navigating the rapidly changing healthcare landscape, JP maintains his optimistic approach to leadership, leaning heavily on the company's core values as his corporate compass. And as the organization navigates the changing tides of the healthcare and senior-living industry, it is clear that their formula for success rests first in their ability to recruit and retain the best and brightest talent in the industry.

"THE 'I AM MASONICARE' RALLY CRY STEMS FROM THE PERSONAL ACCOUNTABILITY
AND COMMITMENT TO QUALITY HELD BY EACH OF OUR TEAM MEMBERS"



GIVING BACK

AND WHILE HIS HOURS AT THE HELM ARE LONG, IN THE SPIRIT OF FREEMASONRY, THIS WALLINGFORD NATIVE DEVOTES COUNTLESS HOURS TO SERVING THE GREATER WALLINGFORD COMMUNITY AS A MEMBER OF NUMEROUS CIVIC ORGANIZATIONS AND MUNICIPAL BOARDS AND COMMISSIONS.

"DON'T BE AFRAID OF CHANGE; BE AFRAID OF NOT CHANGING"

VICE CHAIR WALLINGFORD PLANNING AND ZONING • BOARD MEMBER OF WALLINGFORD EDUCATION
FOUNDATION AND PAST CHAIR • MEMBER OF WALLINGFORD ETHICS COMMITTEE • BOARD MEMBER OF
CONNECTICUT ALLIANCE FOR LONG TERM CARE • BOARD MEMBER OF LEADINGAGE CONNECTICUT
BOARD MEMBER OF QUINNIPIAC CHAMBER OF COMMERCE AND PAST CHAIR • PAST CHAIR OF
CONNECTICUT ASSISTED LIVING ASSOCIATION • MEMBER OF THE CONNECTICUT CONTINUING CARE
RETIREMENT COMMUNITY ADVISORY BOARD • COACH FOR YALESVILLE LITTLE LEAGUE • MEMBER OF
MIDSTATE MEDICAL CENTER BUSINESS ADVISORY COUNCIL • MEMBER AND PAST MASTER OF COMPASS
LODGE NO. 9 • MEMBER OF COSMOPOLITAN LODGE NO. 12 • MEMBER OF ASHLAR LODGE NO. 332
MEMBER OF SPHINX SHRINERS • MEMBER OF LAFAYETTE CONSISTORY — VALLEY OF BRIDGEPORT

Without a doubt, JP Venoit is the quintessential servant leader who believes that strong values, compassion and a commitment to caring are essential traits of a successful executive. At each employee orientation he asks new hires to raise their hand and promise to never be too busy for the little things – because after all – it's all the little things that make a big difference.



NAVIGATING A GLOBAL PANDEMIC

THROUGH TEAMWORK AND AN AGELESS COMMITMENT TO CARING

t the onset of the pandemic, the team at Masonicare wasted no time moving into action with a plan designed to protect their residents and employee team members. "We knew we had to think and act in a way we never had before", states Jon-Paul Venoit, President and CEO of Masonicare. "We were facing an invisible enemy, and we were going to have to work hard and fast to stay ahead of it."

As if preparing for war, Venoit immediately implemented a Coronavirus Task Force, pulling together his key leadership team and instituting several communication methods, including email and Regroup text messaging, to ensure his team members were kept up to date on the rapidly changing pandemic. "Knowledge is power", states Venoit. "The more information we share, the better prepared we are to work as a team to keep our residents and employees safe." The task force calls, which happened seven days a week, kept the team connected on the changing CDC guidelines and DPH updates and allowed for collaborative brainstorming and planning.

Masonicare Health Center, one of the largest skilled nursing centers in the state, operates 357 licensed beds. "Prior to the COVID pandemic, the center was operating at a census of 340", states Ann Collette, VP of Strategy. Department of Public Health records report the facility has had eight residents test positive for COVID-19. Two of those residents died due to complications of the virus. The facility cites several key initiatives as contributors to its safety record. "First and foremost, we moved quickly implementing a number of protocols including visitor restrictions and daily employee screenings across all of our

communities", Venoit said. "We took some heat for the early implementation of visitor restrictions, but we were willing to err of the side of caution for the health and well-being of our residents and staff." And while the virus began its descent on the state, Venoit and his team were busy mobilizing their employee team members, sourcing PPE and implementing policies that would serve to build an almost impenetrable wall around the healthcare center. Non-essential workers were told to work from home, an entirely new concept to Masonicare, but were kept informed through weekly conference calls. "It was important that we had a team sheltering at home in the event our staff became sick and we needed to call in replacements", Venoit stated. "We had to plan and prepare for the worst and hope for the best."

THE RELENTLESS SOURCING OF CRITICAL PPE WAS LED BY ONE OF MASONICARE'S UNSUNG HEROES, PAT MCCOY, DIRECTOR OF MATERIALS MANAGEMENT.

While preparations were being put in place at the healthcare center and residential communities across the state, the delivery of care to homebound residents infected with the coronavirus presented no easy task. At its peak, Masonicare Home Health & Hospice was caring for over 100 infected patients across Connecticut. The courageous and committed team of healthcare providers donned protective gear and took to the roads to deliver the highest level of care in the industry. "I could not be more proud of this team. From leadership through to the front lines, the level of devotion was evident. We had a job to do and we got it done", said Venoit.

PROTEC

SHELTER

ERVE





NAVIGATING A GLOBAL PANDEMIC

The relentless sourcing of critical PPE was led by one of Masonicare's unsung heroes, Pat McCoy, Director of Materials Management, who worked around the clock to ensure enough supplies were on hand for both the healthcare center and Masonicare's Home Health and Hospice service line. And while PPE supplies were scarce, the gracious donations from local businesses and handmade masks lovingly crafted by Masonicare residents and friends helped ease the shortage.

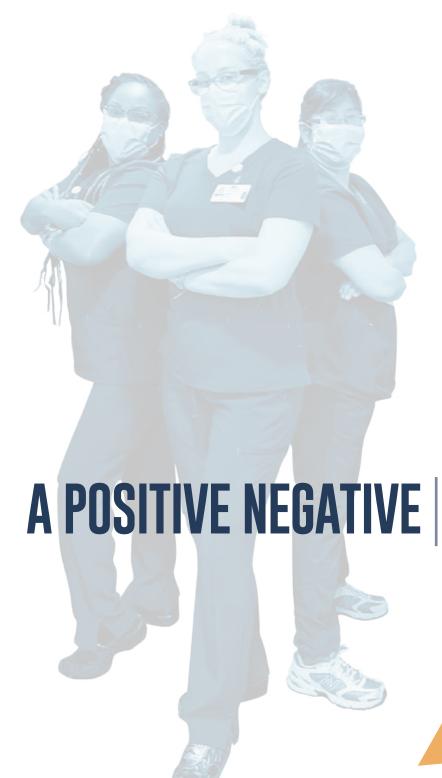
"In March, employees were required to begin wearing masks at all times while in the buildings. In early April, the mandatory masking of all residents went into effect", states Venoit. "If employees left their community, even for five minutes, they were required to go through re-screening. And while some of Masonicare's restrictions and policies might have seemed over the top then, we had no idea where this virus was headed and we were not taking any chances."

Perhaps one of the most effective initiatives was the immediate implementation of the "COVID positive" isolation cohort unit at Masonicare Health Center. "We planned far in advance for the possibility that our residents may be impacted by this virus and took the opportunity to create a COVID positive isolation unit, which was fully equipped with a changing room and shower for staff, and would stand empty, but immediately ready should a patient test positive for COVID-19", states Venoit. "When that happened we were ready."

In addition to the COVID positive isolation unit, Masonicare implemented an "observation" isolation unit, where new admissions or readmissions who have been out of the healthcare center for more than 48 hours would be admitted and monitored for fourteen days before being allowed to cohort with the general population. "We converted semi-private rooms to private rooms where residents are cared for and monitored for fourteen days, regardless of their pre-admit COVID test results. In fact, all of our admissions are required to have a negative test before admission, but are still required to spend fourteen days under close observation", states Collette. "There is simply no room for error."

ON MAY 26TH, THE FACILITY UNDERWENT A MANDATED POINT PREVALENCE SURVEY (PPS) BLANKET TESTING IN WHICH ALL 312 RESIDENTS WERE TESTED FOR COVID-19. ALL 312 TESTS CAME BACK NEGATIVE.

"These are incredible results", states Venoit who explained that they were anticipating the industry standard of a 5-10% positive result. "This is truly the result of thoughtful planning, collaborative teamwork, courageous leadership, and a relentless commitment to caring."





MASONICARE A LEGACY OF RESILIENCE

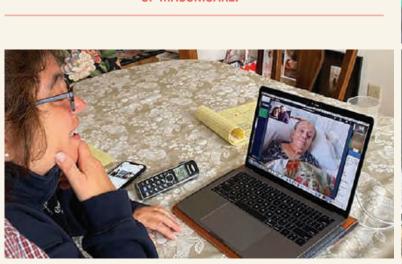
HOW A 125-YEAR ORGANIZATION ROSE ABOVE FEAR AND FOSTERED COMPASSION IN THE MIDST OF A GLOBAL PANDEMIC

he uncertainty of the COVID-19 crisis and the diverse challenges Masonicare had to overcome may have resulted in the single most defining moment for the 125-year old organization.

Throughout history, Masonicare has benefited immensely from its leaders who have consistently led by example, but the COVID-19 pandemic has essentially, according to an article on Deloitte.com, "rewritten the rules of upheaval in modern times". The article, entitled "The essence of resilient leadership: Business recovery from COVID-19", goes on to say, "Times like these need leaders who are resilient in the face of such dramatic uncertainties".

We heard it all – these are unprecedented times, uncertain times – and as the state's largest not-for-profit senior healthcare continuum, we focused on our first and most important priority - the ongoing safety and well-being of our residents, the most vulnerable population, and our employee team members.

"NO EFFORT OR ACT OF KINDNESS WAS INSIGNIFICANT AS EACH ONE MADE A DIFFERENCE AND EMBODIED THE MISSION OF MASONICARE."



In doing so, in facing what was unprecedented, leaders emerged from every corner of the organization – individuals who were committed to our values and to protecting those in our care. No effort or act of kindness was insignificant as each one made a difference and embodied the mission of Masonicare - to enhance the quality of life of seniors through exceptional care. And alongside our selfless employee team members were family members, residents, volunteers, and vendors – all doing their part to rise above the challenges and prove that **#LoveFindsAWay**.







Virtual window visits became the norm. At least until all state residents were asked to limit travel and self-quarantine. "Stay home. Stay Safe." may have meant the end of in-person window visits, but yet again, we found a way to stay connected through video calls, homemade banners and signs, and home-grown video messages delivered on both Mother's and Father's Day.

Life went on in spite of the COVID-19 pandemic and along with it were anniversaries, birthdays, graduations, and births to celebrate. And celebrate we did – albeit in a different way than we may have planned or done in the past.

There were also times when the very tools of our industry – the everyday items that keep our front line workers safe and those in our care comfortable – were dangerously close to extinction. Fortunately, there were warriors, the unsung heroes, at the ready who searched and sourced every mask, gown, and roll of toilet paper to ensure residents, patients and staff of Masonicare would be cared for and kept safe.

RESILIENCE BECAME A CATCHPHRASE. AT MASONICARE, IT BECAME OUR BATTLE CRY FROM THE TRENCHES.

THIS IS MASONICARE.





GROWING GOOD TO GREAT

or 125 years, Masonicare has been committed to serving the needs of the fraternal family and local communities. But over the years, the industry has had more than its share of challenges that have forced operators to rethink business operations and look at strategies for long-term sustainability.

From its early beginnings, Masonicare has been recognized as an innovative and forward-thinking enterprise. Opening its doors on August 5, 1895 as the first Connecticut Masonic Home, the newly renovated establishment provided care and shelter to Masons in "destitute circumstances" as well as the widows and orphans of indigent Masons.

"Operating expenses for the first full year totaled \$4,287.61 which included \$108 for fire insurance and \$62 for medical service and medications. It would be another four years before anyone arrived at a per diem cost: The figure they came up with was .40 cents" (Mushinsky, 2007). One hundred and twenty-five years later Masonicare, now Connecticut's largest non-profit senior care continuum, has operating expenses of 155 million dollars, with 66 million attributed to Masonicare Health Center.

Masonicare has not been immune to the challenges of an industry in transition and has spent the last three years working to restructure the organization for long-term sustainability. Over the past fifteen years, the industry has seen the rising cost of medical supplies, pressured labor markets and reductions in state and federal reimbursement which has landed a number of nursing homes in Chapter 11, while forcing over eighty homes into closure. Operators across the state have been challenged with finding new and improved ways of doing business. For Masonicare, this challenge is no different. Operating a 357-bed skilled nursing facility with an average daily census of 92%, the healthcare center lost a staggering \$6.5 million in FY2019.

As a result of these losses, the senior management team had to look carefully at the operations of each component of the business, comparing financial and quality results to operators locally and regionally. "We weren't surprised to find that there were areas of our business that were not running as efficiently as they could be. Masonicare has been in the business of caring for 125 years. Organizational structures that once served us are no longer viable or optimal options in today's economy", noted Ann Collette, VP Strategy.

"WE SIMPLY CANNOT GO ON SUSTAINING A YEAR OVER YEAR LOSS. It is our obligation to ensure the sustainability of this organization."

"The cost associated with trying to run an in-house pharmacy and radiology department is monumental. You just don't see those services operating this way in a skilled nursing center anywhere", according to Collette. In June of 2020, Masonicare Health Center restructured three service lines - Rehabilitation, Radiology and Pharmacy-as part of their strategic plan to improve efficiencies and delivery of care while reducing operating costs. With Medicare's payment model changing to the Patient-Driven Payment Model (PDPM), it was imperative that the company move to a provider-partner with expertise in this area. "If we want to offer the best rehab services in the industry, we need to have the right partner, resources, education, and team to guide us", states Collette.



Restructuring select service lines brings operational efficiencies, expanded resources, education, and programming while relieving Masonicare of the costs associated with trying to run and operate these service lines internally. "We vetted multiple companies for each service line and took months to find the right fit. With our focus on ensuring best-in-class care and service we believe we have found the right partners. It's never an easy decision as it impacts people's lives, but we cannot continue to operate with such significant operating losses. Additionally, it is imperative that we bring contemporary business models to our organization so that we can continue to offer the best senior care services available."

"WE SIMPLY CANNOT GO ON SUSTAINING A YEAR OVER YEAR LOSS. IT IS OUR OBLIGATION TO ENSURE THE SUSTAINABILITY OF THIS ORGANIZATION."

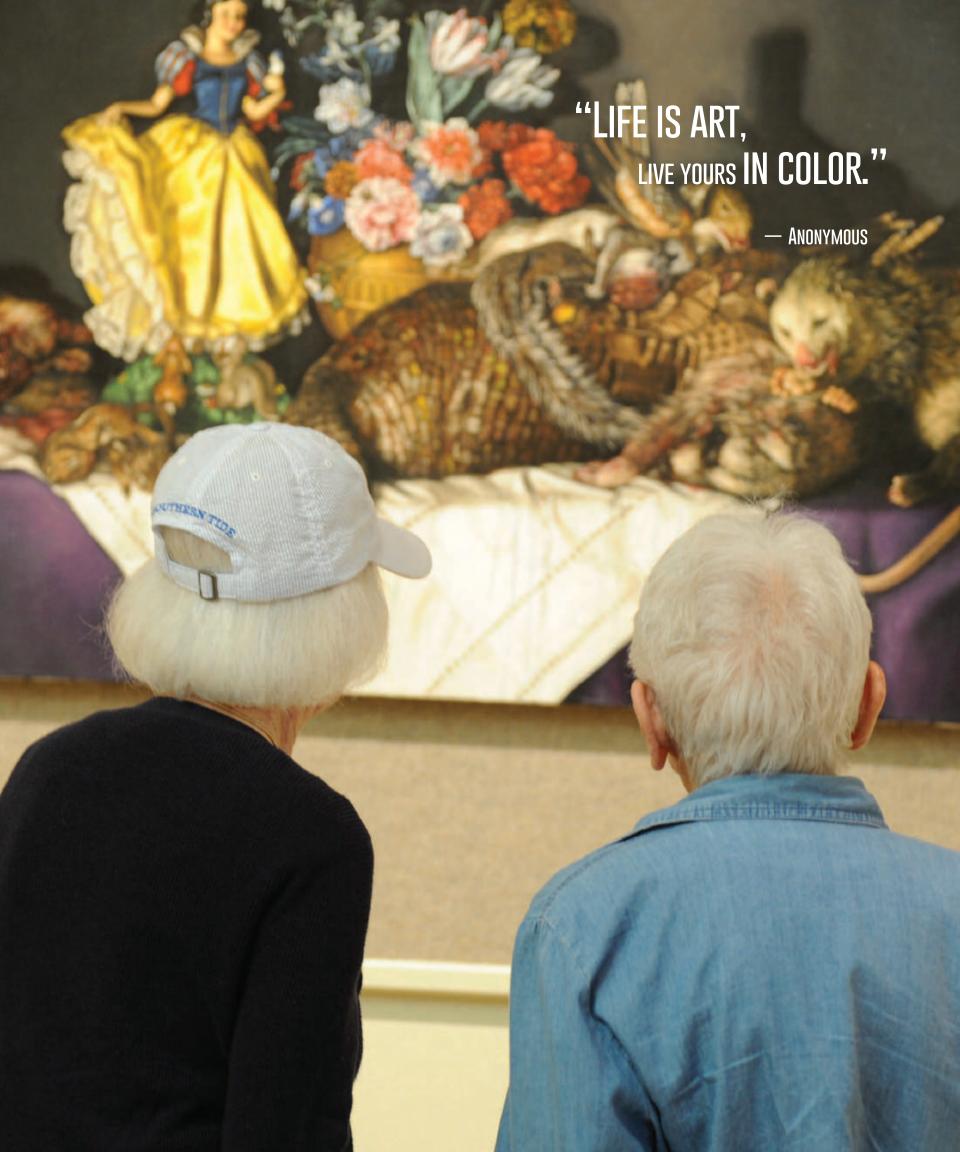
Masonicare Health Center is not the only service line to undergo reorganization. In fact, over the past three years, there have been numerous strategies all designed to drive revenue, improve care and efficiencies, and reduce expenses. "We simply cannot go on sustaining a year over year loss", states President & CEO Jon-Paul Venoit. "It is our obligation to ensure the sustainability of this organization." From electronic medical record platform conversions and the evolution of the Masonicare brand logo and ICARE values to the purchase of a residential community in Chester, Connecticut and the sale of a skilled nursing center in Newtown, the team at Masonicare has been working diligently to realign the organization for long-term sustainability. In addition to internal restructuring, Masonicare is focused on developing strategic partnerships with like-minded mission-based partners who can bring valued resources to the table.

"ONE OF THE MOST VALUABLE THINGS WE HAVE LEARNED IS WE CANNOT DO THIS ALONE. FOR TOO LONG WE HAVE OPERATED IN A VACUUM, WHILE OTHER ORGANIZATIONS WERE CREATING PARTNERSHIPS AND STRATEGIC ALLIANCES", STATES VENOIT. "CHANGE IS NEVER EASY BUT IT IS A CRITICAL COMPONENT TO SUCCESS. AND AS THE SIGN OUTSIDE MY OFFICE DOOR READS..."DON'T BE AFRAID OF CHANGE; BE AFRAID OF NOT CHANGING."



STRATEGIC INITIATIVES

- Partnered with third-party provider,
 West Haven Medical Group, to provide
 Physician Services
- Opened medical clinic at Masonicare at Ashlar Village
- Opened Masonicare at Mystic
- Sold Masonicare of Newtown
- Restructured GMPP physician model
- Purchased Masonicare at Chester Village
- Terminated Partner's Home Health and established Hartford branch of Masonicare Home Health & Hospice
- **Completed** construction at Chester Village and held Grand Re-opening
- Began Brand Evolution process
- **Introduced** new logo and additional ICARE values
- Created new and reenergized employee orientation program
- Launched new website
- **Restructured** Marketing Department and added Digital/Media team
- **Launched** social/digital campaigns on Facebook, Instagram, Twitter, LinkedIn
- Created Masonicare TV
- Transitioned from existing electronic medical system to new system designed to improve efficiencies
- **Expanded** Assisted Living Services to other communities
- Introduced streamlined Board structure
- Leased Medical Office Building first floor to Yale New Haven Health Orthopedics
- **Filed** CON to close the Chronic Disease Hospital, expand our successful behavioral hospital beds and enhance the rehab experience
- Outsourced Pharmacy Services to Woodmark
- Outsourced Radiology Services to NOA Diagnostics
- **Outsourced** Rehabilitation Services to HealthPro Heritage
- **Closed** GI Clinic Exploring lease arrangement with Yale





A MESSAGE TO THE COMMUNITY

Dear Friends,

As its philanthropic affiliate, The Masonic Charity Foundation of Connecticut supports Masonicare in its mission to enhance the quality of life of residents and patients across the continuum of care. Contributions to The Masonic Charity Foundation do so much to enhance the quality of life of residents and patients in financial need, providing programs and services when no other funding is available.

Even during these unprecedented times, The Foundation has adapted to care for residents and patients in need in unique ways. For example, funding has been reallocated to prioritize keeping residents and patients engaged and connected in the midst of social distancing, providing newspaper subscriptions to read local stories and iPods full of favorite tunes.

While Masonicare serves a large number of residents and patients in financial need, one of its primary missions is to provide the same high-quality care to all, regardless of financial circumstance. In 2019, 72% of our long-term care residents and 87% of those living at the residential care home in Wallingford (the Wright Residence) received government assistance. As well, 12% of our community-based patients qualified for government assistance, which covered only a portion of their healthcare costs.

Because government reimbursement falls short of meeting the actual costs of delivering care to these populations, Masonicare relies on gifts to The Foundation to help cover the shortfall.

Our wonderful donors and supporters continue to rise to the occasion with their generosity. We're consistently inspired by the wide array of donors who choose to contribute to Masonicare, including individuals and organizations with Masonic affiliations; Masonciare residents and patients and their loved ones; board members and employees; corporate sponsorship and matching gift programs; and grants from family foundations. Through this community of donors, The Foundation received contributions totaling \$4,835,349 in fiscal year 2019 in support of the programs and services of Masonicare.

Thank you to all those who have helped support the work and vision of The Masonic Charity Foundation of Connecticut! Please enjoy just a few of The Foundation's highlights from the past decade and learn how you can make a gift to benefit residents and patients in need today!

Jennifer

Jennifer A. King **Executive Director**





Geoffrey L. Ice Chairman, Board of Directors

PLANNED GIVING REMEMBERING GORDON SCHLAF

bviously, you would give your life for your children, or give them the last biscuit on the plate. But to me, the trick in life is to take that sense of generosity between kin, make it apply to the extended family and to your neighbor, your village and beyond."

Playwright Tom Stoppard.

LEAVING A LEGACY TO OUR IMMEDIATE FAMILY IS SOMETHING WE COMMONLY THINK ABOUT. LEAVING A GIFT TO PEOPLE YOU MAY NEVER PERSONALLY MEET IS A BIT MORE UNCOMMON...AND SO WAS GORDON A. SCHLAF.

A 50-year Mason and member of Composite Lodge No. 128 in Suffield, CT, Gordon had made a few, small gifts to The Masonic Charity Foundation's Annual Appeal and Holiday Appeal over the years. He had also done something remarkable over 20 years ago: Gordon included The Foundation in his estate plan and in August of 2018, The Foundation received an unrestricted bequest of \$1,550,000 from his trust.

A LIFETIME OF QUIETLY GIVING BACK

For most of their lives, Gordon and his wife Leethie lived in Somers, CT, where they owned farmland they leased out to local farmers. Gordon served his country honorably in the U.S. Army and retired as sergeant after 20 years of service. The Schlafs did not have their own children, but treated the people around them in the open-hearted way traditionally reserved for family. Though he was considered a quiet man, Gordon enjoyed conversations about politics of the day with friends at local eateries and was a HAM radio enthusiast. A longtime member of Somers Baptist Church, he is remembered by all as a truly giving person, both of his time and financial support, to a variety of local charities and organizations.

Gordon made the generous provision in his trust to support The Foundation over two decades ago and, given his foresight and altruism, Masonicare is honored to have been of service to him in his final years. Following the passing of his wife in 2015, Gordon began receiving live-in services from Masonicare at Home until his passing at home in 2016. His Masonicare at Home live-in caregiver, Yao Agbodan, remembers him fondly: "Gordon left a mark on my life. I miss him and think of him often. He was fun-loving, kind and enjoyed sharing stories about his home and the history of the property."

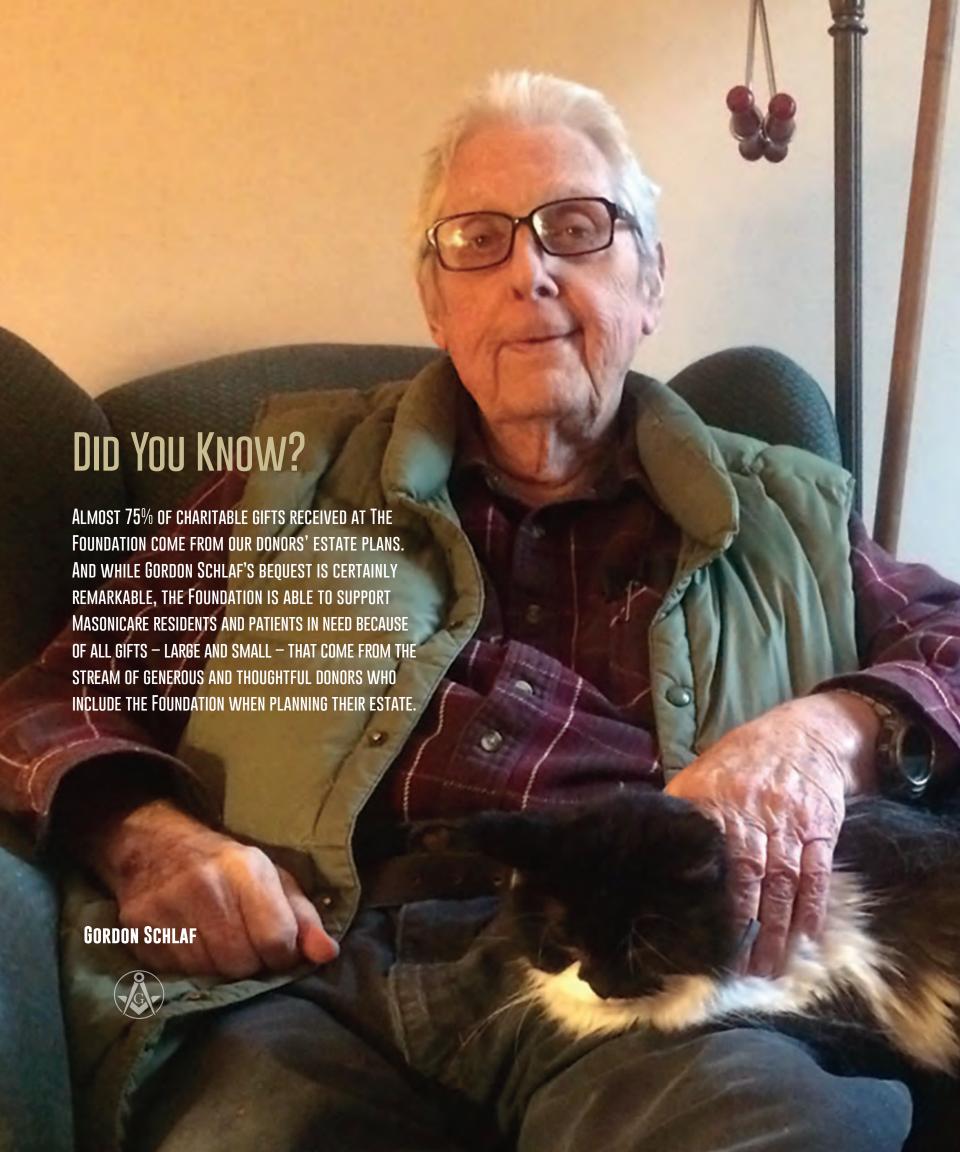
"BEQUESTS LIKE GORDON'S ARE A VITAL SOURCE OF SUPPORT FOR THE MASONIC CHARITY FOUNDATION."

With the support of Yao, Gordon was able to live at home and stay connected to the town he loved. "We'd go out and about all the time to the various places in town Gordon loved to visit," recalls Yao. "We'd take day trips, go out to lunch and shopping trips, even prepare meals together. Best of all, Gordon remained very active in his community, especially with his beloved church."

The Masonic Charity Foundation's Executive Director, Jennifer King, comments, "Bequests like Gordon's are a vital source of support for The Masonic Charity Foundation. We are very grateful to him for leaving such an outstanding legacy to our organization, which will enable Masonicare to make a long-lasting difference in the lives of its residents and patients in need for years to come. The Foundation plans to show its great appreciation to Gordon with a special gift-naming at one of our Masonicare facilities to honor this outstanding donor and his bequest."

KINDNESS

GENEROSITY



ANNUAL GIVING

REMINDING US THAT THE SMALL THINGS MAKE A BIG DIFFERENCE

JON-PAUL VENOIT

"GIFTS TO THE MASONICARE ANNUAL APPEAL - BIG AND SMALL - ADD UP. IT'S LIKE I ALWAYS REMIND OUR NEW EMPLOYEES: LITTLE THINGS CAN MAKE SUCH A BIG DIFFERENCE TO THOSE WE SERVE. EVEN WHAT A DONOR WOULD CONSIDER A SMALLER GIFT MEANS A LOT BECAUSE IT ENABLES US TO DO THOSE LITTLE THINGS FOR OUR RESIDENTS AND PATIENTS."

on-Paul Venoit remembers the first time he learned about the role that donors play in helping Masonicare enhance the quality of life for our residents and patients in need. He was still in high school and waiting tables part-time in the dining room at Ashlar Village.

"I was waiting on the then-president of The Masonic Charity Foundation, Bill Kimbell," Venoit recalled. "I wondered what his role was at Masonicare. It was one of our first Ashlar Village residents, Herb Perkins, who explained to me how gifts to The Foundation help Masonicare provide some of the most basic necessities for individuals living in our nursing home."

"I'VE HAD THE OPPORTUNITY TO SEE LOVED ONES USE OUR CONTINUUM. FROM THAT PERSPECTIVE, I SAW FIRSTHAND HOW MUCH THE LITTLE THINGS MEAN TO THOSE IN OUR CARE."

Now President and CEO of Masonicare, the man known affectionately as "JP" reflects on the ways in which Annual Appeal gifts of all sizes — even modest ones — are having an impact not just at Masonicare Health Center.

"Small gifts add up," Venoit said. "It's like I always remind our new employees during orientation: little things can make such a big difference to those we serve. Even what a donor would consider a smaller gift means a lot because it enables us to do those little things for our residents and patients." Whatever size gift to the Masonicare Annual Appeal you make, The Foundation will make sure it's put to the very best use.

"All of my grandparents lived at Masonicare Health Center," Venoit said, "along with both of my wife's grandmothers and grandfather. I've had the opportunity to see loved ones use our continuum. From that perspective, I saw firsthand how much the little things mean to those in our care."

GIFTS OF ALL AMOUNTS TO THE MASONICARE ANNUAL APPEAL DIRECTLY BENEFIT RESIDENTS AND PATIENTS IN NEED!

A gift of \$25 provides medication organizers for five Masonicare Home Health patients in financial need to help minimize medication errors.

A gift of \$50 to the Annual Appeal secures a month of supplies for the sundries cart, which provides favorite snacks and personal care items to Masonicare Health Center residents.

A donation of \$100 gives the gift of mobility to a long-term care resident in need by paying for a replacement battery for his or her power chair.

BENEFIT





Enhancing the quality of life of Masonicare residents and patients in need.

Here are some examples of programs and services made possible throughout the past decade.

FOR LONG-TERM CARE RESIDENTS AT MASONICARE HEALTH CENTER:



Chapel Renovations to improve accessibility



Shared
Computers
for the resident
library



Power Chair repair for long-term care residents



Wheelchair Accessible swing to enjoy the outdoors



Sundries Cart bringing treats and snacks to residents

FOR COMMUNITY PATIENTS OF MASONICARE HOME HEALTH & HOSPICE:



Pulse Oximeters to measure patients' blood oxygen levels



Large Print
Calendars
for ease of reading



Skilled Nursingvisits to keep
patients safe at
home



Medication Organizers to ensure proper dosages



Nutrition
Consultations
to reduce hospital
readmissions



EMPLOYEE GIVING CUT FROM THE SAME CLOTH STACY ALLEN & REVEREND DON ALLEN

By Joanne Kimball

orporate Compliance plays a central role at Masonicare, one that the department's Director, Stacy Allen, takes deeply to heart: "I sometimes say we are the 'conscience of Masonicare,' in that we're here to ensure that we meet the highest level of ethics, integrity, and philanthropy... the foundation on which the Masons built this incredible organization."

"I also like to say that it takes a village to uphold these values. We think of everyone who works at Masonicare as 'Knights of the Compliance Roundtable' because it takes all of us working together to meet the high standards of the Office of Inspector General, Medicare, and Medicaid."

Stacy began her career at Masonicare in 2006, but her roots and experience of the organization go back a few generations. Her great-grandmother received long-term care at what was then called the Masonic Home. Stacy's grandfather, Rev. Don Allen, became a chaplain at Ashlar Village, and he and his wife, Augusta, moved to a cottage where they lived for many years. When her health started to decline, Augusta eventually moved to Ramage 3 at the Masonicare Health Center and received excellent care under Masonicare's hospice program. After his beloved wife passed, Don moved to Bridgehouse at Ashlar Village. Now an active 93-year-old, Don is a 70-year Mason, a current member of Corinthian Lodge No. 63 in North Haven — where his son, Donald Allen Jr., was a Past Master — and a current member of Ashlar Lodge No. 332 in Wallingford.

In 2017, Don was honored as a Benefactor of The Masonic Charity Foundation of Connecticut, when he established a very generous charitable gift annuity, which will ultimately benefit Masonicare residents and patients in need.

"NO MATTER WHO YOU ARE, THE ANNUAL APPEAL HAS TOUCHED YOU OR SOMEONE YOU CARE ABOUT, IRRESPECTIVE OF THEIR FINANCIAL STATUS"

Stacy's grandfather's generosity has made a deep impression on her. "I think he and I are cut from the same cloth. We both believe that it's not just quantity of life that's important, it's also quality. Coming from a Compliance perspective, I understand that senior organizations are having to do more with less funding today. I see the real financial gap that exists and that many quality-of-life services are in jeopardy. So giving to the Masonicare Annual Appeal is a wonderful way to help provide the things that make life worth living for our long-term care residents, such as recreational activities, music therapy... even batteries for power wheelchairs — something NOT covered by Medicare."

"YOUR GIFT GOES DIRECTLY TO PATIENTS AND RESIDENTS — AND MORE OF IT GOES TO THEM THAN ANY OTHER CHARITY OUT THERE."

TEGRITY PHILANTHROPY

S E



BOARD GIVING

BOARD MEMBER'S GIVING MAKES A BRIGHTER TOMORROW POSSIBLE

BILL DEICKLER

asonicare trustee Bill Deickler recalls how, as a young Mason, he first learned about the good work of Masonicare and how giving to the Annual Appeal benefitted residents and patients in need. It not only inspired his own generous giving, but also that of his lodge.

"I found it really interesting," said the Past District Deputy and Past Master of Jerusalem Lodge No. 49 in Ridgefield, "that Masonicare was founded by Masons, beginning with the creation of The Masonic Charity Foundation and the opening of the Masonic Home over a century ago. At Jerusalem No. 49, we contributed to The Foundation as a lodge. We'd pledge gifts five, ten years at a time. As I became more involved in my lodge, I worked to keep that commitment going because I always felt Masonicare was well-run."

"USING ANNUAL APPEAL DOLLARS TO PAY FOR THE LITTLE THINGS THAT MAKE LIFE MORE ENJOYABLE IS JUST FANTASTIC."

Bill was already supporting the Masonicare mission financially when he volunteered to devote more of his time and energy to the cause. In 2001, he was appointed to the board of what was then known as Ashlar of Newtown. He joined the Masonicare Board of Trustees in 2008 and was elected Vice-Chairman in 2016.

Coming from a background in buying, developing and renovating properties, Bill says that he enjoys his board service because it's "totally different" from what he does for a living. And yet, metaphorically, it's not that different. In either arena, the themes of building and improving are mutually applicable.

"I'm amazed at how Masonicare just keeps getting better," he said. "The changes I've seen from when I started in 2001 to now are huge. The organization's leadership always seems to be focused on trying to anticipate, as well as they can, what's coming down the pike. They want to be prepared, and from my perspective, they've done very well in that regard."

All of which have fueled Bill's excitement for the future of Masonicare. But tomorrow, just as they do today, Annual Appeal donors like Bill will play an important role in helping Masonicare meet the evolving needs of its residents and patients.

"I hope and expect that the money we donate will continue to be used to benefit those who need it most," he said. "Using Annual Appeal dollars to pay for the little things that make life more enjoyable is just fantastic. That alone should be reason enough for anyone to give."

"Bill has been very steadfast in his support over many years," said The Masonic Charity Foundation's Executive Director, Jennifer King. "He cares deeply about the well-being of Masonicare residents and patients and expresses his commitment to them through his board service and his generosity to The Foundation."

BIVING

SUPPORTING

MILDING





Making a Donation to The Masonic Charity Foundation of Connecticut is as easy as 1-2-3!





- 1) Visit www.masonicare.org/mcf and click on the
- **Donate Now**
- button
- 2) Fill out the form, including any optional tribute information, and click on
- Submit Payment
- 3) Receive your thank you letter for tax purposes via email in seconds!

If you prefer to make a gift by mail, please send your check made payable to MCF of CT to:



The Masonic Charity Foundation of Connecticut

Attn: Masonicare Annual Appeal

P.O. Box 70

Wallingford, Connecticut 06492-7001

PLANNED GIVING: LEAVING A LEGACY

A gift in your Will, also known as a Bequest, is another wonderful way to support The Foundation. Should you wish to remember The Foundation in your Will or Trust, we encourage you to provide the following bequest language to your attorney:

"I give, devise, and bequeath all the rest, residue, and remainder of my estate, or _____% (percentage) of my estate, or \$_____% (sum of money) to The Masonic Charity Foundation of Connecticut, Inc., located in Wallingford, CT."

Please note that The Foundation is a non-profit 501(c)(3) organization, and its full, legal name is "The Masonic Charity Foundation of Connecticut, Inc." The Foundation's federal tax identification number is 06-1435920. If you have any questions about making a gift to The Masonic Charity Foundation, please contact us at 203-679-5555 or MCFinfo@masonicare.org.



MASONICARE COMMUNITY SERVICES A LEGACY OF COMMUNITY & KINDNESS

asonicare Community Services has been closely tied to Masonicare's mission of kindness and helping others since it's inception. At MCS, we use our education, time and resources to help our residents, families of our residents, the Fraternal family, and those in the community at large. Our outreach includes the educational Lunch & Learn program, home visits, support groups for residents, residents' families & caregivers, certified CHOICES counseling for Medicare & Medicaid decisions, The Connecticut Walks to End Alzheimer's, The Florida and Connecticut Nutmegger Reunions, and Grand Master's Day/Masonicare Family Day.

SOME OF OUR GREATEST SUCCESSES COME FROM HELPING SENIORS FIND ADDITIONAL FINANCIAL RESOURCES FOR HEALTHCARE, HOMECARE AND GENERAL SUPPORT.

Unique to most healthcare organizations, Masonicare, through MCS, has it's own committee that focuses on the communities outside of our walls. Through food drives, bottled water and fan collections, book drives, back-to-school supply drives, complete holiday meal Thanksgiving & Easter baskets, and clothing drives, our employees rally to ensure that we thoughtfully embrace all who need help.

Our counseling, home visits and close connections to state resources are available to anyone in the state of Connecticut. Some of our greatest successes come from helping seniors find additional financial resources for healthcare, homecare and general support.



REAL LIFE STORY

A retired couple came to us with questions regarding their Medicare options relating to their monthly income, which was solely their combined social security. After checking resources and local agencies, MCS was able to find a state program that increased their joint monthly income by \$400!



SERVICE TO OTHERS IS THE RENT YOU PAY FOR YOUR ROOM HERE ON EARTH.



SMALL ACTS, WHEN MULTIPLIED BY MILLIONS OF PEOPLE, CANTRANSFORM THE WORLD.









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