

PEOPLE & PROPERTIES

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**Former Director*

Thank you for the
job well done!

SENIOR MANAGEMENT

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Vice President of Human Resources

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Chief Operating Officer

PROGRAMS AND PROPERTIES
UNDER MANAGEMENT

BEACON HOUSE
CARLETON HOUSE
COMMUNITY AT POND MEADOW
COOPER HOUSE
COUNCIL TOWER
ELDER ASSISTANCE FUND
FARNSWORTH HOUSE
FENWAY STUDIOS
FLORENCE HOUSE
HALE BARNARD SERVICES
HILL HOUSE
HONG LOK HOUSE
JOY STREET RESIDENCE
LONGFELLOW HOUSE
MASON WRIGHT
PETER FANEUIL HOUSE
POND HOME
RESIDENCES AT SNOW PLACE
ROGERSON HOUSE
ROGERSON HOUSE DAY PROGRAM
ROGERSON EGLESTON ADULT DAY
HEALTH PROGRAM
ROGERSON ROSLINDALE ADULT DAY
HEALTH PROGRAM
ROGERSON ROSLINDALE DEMENTIA
DAY PROGRAM
ROGERSON FITNESS FIRST
ROSLINDALE HOUSE
SOPHIA SNOW HOUSE
SPENCER HOUSE
SPRINGHOUSE
WALNUT HOUSE

ELDERS HELPED BY ELDER ASSISTANCE FUND EMERGENCY GRANTS

MEALS AND SNACKS SERVED AT OUR 3 DAY-PROGRAM SITES

PROPERTIES AND PROGRAMS MANAGED

ADULT DAY HEALTH INDIVIDUALS (AND FAMILIES) WHO RELY ON OUR PROGRAMS

FITNESS FIRST SESSIONS AT 5 ROGERSON SITES

HOUSING UNITS OPERATING, WITH 322 MORE ON THE WAY

NUMBER OF CANDLES ON THE BIRTHDAY CAKE OF OUR OLDEST RESIDENT

AVERAGE INCOME OF ELDERS IN ROGERSON'S SUBSIDIZED HOUSING

Our numbers
tell a powerful
story.

ROGERSON
2015 ANNUAL REPORT

A YEAR OF
GETTING IT DONE

Rogerson is pleased to have completed and celebrated the opening of two important affordable housing projects in 2015. **Hong Lok House** and **Cooper House** became fully operational, opening their doors to residents and dignitaries in honor of the occasion. Hong Lok House will be the center for elder activity in Chinatown with 75 affordable units, an Adult Day Health program and a community center. Cooper House completes an historic campus in Egleston Square that will serve the community for years to come. It brings much needed housing to a once abandoned property.

Equally important, the opening of these properties allowed us to bring together key City of Boston officials and dignitaries. Rogerson has enhanced our strong working relationship with Boston's Mayor Martin J. Walsh, Commissioner of Elder Affairs Emily Shea and Commissioner of the Department of Neighborhood Development Sheila Dillon. We have had the opportunity to again show City and State leadership what we do and how well we do it.

Another major project under development, **Fairing Way**, has picked up momentum and will soon be under construction. Also, in partnership with MADSA, Rogerson secured statewide Massachusetts Department of Public Health licensure for all adult day health programs, raising the efficacy and quality, and helping to secure understanding of these critical programs.

Perhaps our greatest honor of the year was speaking before our national **LeadingAge** colleagues. Rogerson was selected to be an education site for the **2015 National Conference** and 60 attendees toured our Roslindale site. Executives, officials and all ranks of national elder-care leaders came to learn about the Rogerson model. The reviews of the day were outstanding. There is quite simply nothing like a jury of your peers singing your praises.

It is with great pleasure that we present you with the 2015 Annual Report of Rogerson's work. As all the numbers indicate, it was a year of getting it done.

James F. Seagle, Jr.
JAMES F. SEAGLE, JR.
President
Rogerson Communities

Brit D'Arbeloff
BRIT D'ARBELOFF
Board Chair
Rogerson Communities



COOPER HOUSE

At a time when most communities are finding it impossible to increase critically needed housing stock for low-income residents, Rogerson is forging ahead with creative partnerships. With HUD 202 funding essentially nonexistent, we have received vital financing with the help of state, city and community partners. We're proud to point to Hong Lok House and Cooper House as key successes of the year and look forward to the opening of Fairing Way, a continuum-of-care independent living and quality nursing care facility. A partnership with the William B. Rice Eventide Home, Fairing Way will offer 216 apartments, a club house and a new 50-bed, village-style nursing home with a dementia unit within the master-planned community of SouthField.

Our numbers are impressive. Rogerson built 20% of the City of Boston's 401 units of newly developed low-income housing in 2015. We achieved these successes by maximizing our philanthropic partnerships and repeatedly proving that our housing and healthcare service programs bring the greatest good to Boston's elders. As a result, we are considered by the City of Boston and the housing development community a leader in the creation of effective models and innovative solutions for housing and supportive health services for a growing number of elders.

On the state level, Rogerson Communities' work with the Massachusetts Adult Day Services Association (MADSA) culminated in the adoption of the Massachusetts Department of Public Health licensure process. Having pioneered Adult Day Health Programs more than 35 years ago, we have now helped create statewide standards for quality programming.

Whether developing housing or creating supportive health services for low and moderate income elders, Rogerson meets and exceeds goals. As we address the unmet needs facing our elders, we continue to devise and implement innovative solutions.



We get it done!

HONG LOK HOUSE



FAIRING WAY

2015 GIFTS TO
ROGERSON COMMUNITIES

You have made 2015 a remarkable year of philanthropy for Rogerson. We wrapped up a \$3 million fundraising initiative, saluted Meredith and Gene Clapp and the entire Beacon Hill community at *Welcome Home*, launched our *Frame of Mind Project*, received our first million-dollar gift, and benefited from a most generous bequest from a long-time friend. Thank you.

INDIVIDUALS

\$500,000 and above
Brit d'Arbeloff

\$100,000–499,999
Anonymous (1)

\$50,000–99,999
Eugene H. & Meredith P. Clapp • Susan Rothenberg

\$25,000–49,999
Vincent & Carla Ryan

\$10,000–24,999
Harold & Maura A. Brown • Nonnie & Rick Burnes • Harold J. Carroll • Lloyd C. & Gene D. Dahmen • John L. Hall II & Ann T. Hall • Donald & Patricia Hillman • Barbara & Amos Hostetter • Ogden M. & Nina Hunnewell • James F. Seagle, Jr. & Barbara Seagle, M.D. • Samuel O. Thier, M.D. & Paula Thier

Tricia Claudy • Charles L. Cooney & Peggy Reiser • Carolyn F. Corcoran • Miguel & Sukie de Braganca • Paul Demakis • Robert P. & Joy K. Fallon • Daniel B. Ford, III & Amy S. Ford • Frederic J. Gardner & Sherley G. Smith • Arthur L. & Vida Goldstein • Barbara Grossman • Erling A. Hanson, Jr. & Elizabeth M. Hanson • James D. Houghton & Constance B. Coburn • Benjamin D. Humphreys, M.D. & Lisa Humphreys • Timothy A. Ingraham • Elena Kingsland • David S. Kirk • William Leitch • Stacey L. Marino • James & Barbara McNeely • Gary R. Mikula & Holly Burnet Mikula • David H. & Susan McWhinney Morse • Peter Petri & Jean Lawrence • Maureen E. Rooney & Charles W. Greenleaf, Jr. • James C. Rosenfeld & Sharon Nolan • Richard L. & Diane H. Schmalensee • Dana Schmaltz & Kate B. Enroth • Ross E. & Kathleen B. Sherbrooke • Brian J. Slater • Mindy F. Spitz • H. Porter Terry III & Carol L.S. Terry • E. Denis & Janie Walsh • Thomas C. & Ellen Takagi Walsh • In honor of Nonnie & Rick Burnes: Barbara Fish Lee

\$250–499
Betsey I. Ansin • Susan F. Doran • John W. & Carol D. Filbin • Stephen E. Goldfinger, M.D. • Elsie B. Hermann • Franklin Hobbs IV & Linda B.R. Hobbs • William Hobbs • Paul Hoffman • Islands Icart • Shelley Kaplan & Alan Carvalho • Mark R. Kiefer • Gary Leach • J. Cleve & Virginia G. Livingston • Michael K. & Arlynn H. Livingston • Mr. & Mrs. Charles C. Lockwood • John Martilla • James R. & Karen McSherry • Tim & Beth Mickelson • David M. Pilgrim, M.D. & Kimberly Rawlins • Louise C. Riemer • Donna N. Quirk • Gustavo Quiroga • Peter H. Raymond • William G. Rogerson • Michael J. & Karen Rotenberg • Kenneth R. & Cynthia M. Scott • Edward Sople • Jeffrey Walker • In honor of Mr. & Mrs. Eugene Clapp III: Oliver C. & Cecily C. Colburn

\$100–249
Efharis Alepedis • Peter Kronheimer & Jennifer Andrews • Tony Bates • Linda L. Berkowitz • Ernst R. & Joan M. Berndt • Richard G. Brown, Jr. • Bernice Brojde • Robert D. Chellis & Sandy Adams • William & Lisa Chioffi • Marjorie Clapp • Dennis & Marie Corcoran • Charles W. & Elaine Davidson • Mr. & Mrs. A. David Davis • Phyllis DeLarichellere • Lawrence S. DiCara • Jeff Dickinson • Florence L. Everett • James M. & Janet B. Fitzgibbons • Susan A. Flanagan, M.P.H., Ph.D. • Dan & Camie Ford • Joseph S. & Cynthia L. Freeman • Matt Gibbs • Richard Hollander • Frederic B. & Caroline Hoppin • Erica Houghtlin • Sarah D. Hurlbut • Christa Jones • Jane Kelley • Walter G. & Elizabeth S. Kenyon • Jorge Laíres • Curt Manatt • Joseph G. Mari • Massik Family Fund • Todd T. & Charlotte F. Maynard • Bonlyn A. McBride • John S. & Sandra M. McWhirter • Franklin B. Mead, III & Penny Mead • David T. May • Peter & Beatrice Nessen • Jodi Panico • Frances P. Perry • Christopher & Elizabeth R. Reece • David P. Rockwell & Debra L. Hall • Tweed & Leslie Roosevelt • Ryan Scannell • Martin Schetzen, Ph.D. & Jeannine M. Schetzen • Michael A. Schofield & Andrea d'Amato • Peter Smith & Catherine S. Dickey • Colin & Victoria Smyth • Merlin Southwick • Margaret W. Stubbs • W. Nicholas & Joan Thorndike • Patrice Vinci • Constance V.R. White • Betsy Whitters • Katherine B. Winter • Marjorie J. Witherspoon • Lila Wolff • In honor of Brit d'Arbeloff: J. Philip & Wendelyn McGourty • In memory of Betsy P. Leitch: Thomas E. Weesner • In memory of Dr. Herbert Levine: Shapur Naimi, M.D. & Amy C. Naimi • In memory of R. Marshall Schell: Janice Schell • In honor of Paula Thier: Lois F. Nesson

Up to \$100
Anonymous (1) • Jason Leo Baguio • Jacob L. & Nancy L. Bloom • Peter W. Bolton • Keri A. Aulita • Deborah Cawley • Susan Correa-Silva • Bradley & Margaret Day • Steve Glick • Paul Greenfield & Sandra C. Steele • Joseph A. Hunter & Esther

\$500–999
Carter & Peggy Bacon • Courtney A. Barth • Peter M. & Kay Bernon • Catherine V. Brigham • Andrew P. & Amy W. Burnes • Charity Warriors • Lisa Clark •

We are honored to have your
enduring support.

Schlorcholtz • Virginia M. Lawrence • Thomas F. & Mary K. Maloney • Lisa A. Martancik • Catherine H. Mason • Margaret E. Michaud • Harold I. Pratt • Alexa Romero • Darien N. Smith • Michael & Annlinea Terranova • Monk Terry • Hazel Wightman • Michael Winston • Doris Yaffe • In memory of Florence Lieberman: The Hoffman Family

In-Kind Donations
Above & Beyond Catering • Anonymous (1) • Be Our Guest • Bradham Design • Boston Magazine • Cahoots Design • Catherine Carroll • Copley Place • Stephen St. Francis Decky • Discover Roxbury • Fire Opal • A. David Guerra • Barbara Hicks • Humble Hues • Olivia Ives-Flores • Zacharie Lanoue • Darrin D. Leverett • Eric Levin • Michael Blanchard Photography • Neiman Marcus • Martignetti Companies • Max Ultimate • Elliott Olson • Jorge & Barbara Quiroga • Eileen Ricci • Cheryl Richards • Emily Rooney • Simon • The Liberty Hotel • Allana Taranto • Mitch Weiss • Winston Flowers

CORPORATIONS AND
FOUNDATIONS

\$1,000,000 and above
Vincent Mulford Foundation

\$500,000–999,999
Estate of Noah Katz • Goldman, Sachs & Co.

\$100,000–499,999
Anonymous (1)

\$50,000–99,999
Dellbrook Construction, LLC • Fidelity Investments Charitable Gift Fund • The Janey Fund • In memory of Bob Kuehn: Kuehn Charitable Foundation

\$25,000–49,999
Anonymous (2) • The Boston Foundation • Charles H. Farnsworth Trust, Bank of America, N.A., Trustee • Elisha Ashton Trust • George H. and Jane A. Mifflin Memorial Fund • The James and Sarah Dyer Charitable Fund, Bank of America, N.A., Trustee • The Schooner Foundation • Yawkey Foundation

\$10,000–24,999
Bushrod H. Campbell and Adah F. Hall Charity Fund • Charles F. Bacon Trust, Bank of America, N.A., Trustee • Gould Charitable Foundation • The Hamilton Company Charitable Foundation • Nixon Peabody LLP • Sailors' Snug Harbor of Boston • Tufts Health Plan Foundation

\$5,000–9,999
Blue Hills Bank Charitable Foundation • Brookline Bank • Brookline Tuberculosis & Health Society • Chia-Ming Sze Architect, Inc. • East Boston Savings Bank • Edward Austin Trust, Bank of America, N.A., Trustee • The Howard C. Connor Charitable Foundation • John Moriarty & Associates, Inc. • The Mattina R. Proctor Foundation • Partners HealthCare Systems, Inc. • Penobscot Investment Management Co., Inc. • Robert Brigham Trust • Schwab Charitable Fund • Shields Health Care Group LP • TJX Foundation

\$2,500–4,999
Adelard A. Roy and Valeda Lea Roy Foundation • Alvord Family Foundation • Boston Private Bank & Trust Company • Brooks Automation • Eastern Bank Charitable Foundation • The Fieldstone Foundation • Greater Boston Chinese Golden Age Center • HUB International New England • The Mary B. Dunn Charitable Trust • Massachusetts General Hospital • Merck Partnership for Giving • Mulhern Mechanical, Inc. • Sophia Snow Place

\$1,000–2,499
The Alchemy Foundation • Bay Contracting, Inc. • Ercolini & Company LLP • Fiduciary Trust Company • Grayson Family Foundation • The New York Community Trust • Ritx Associates, Inc. • Rubblestone Foundation • The Stifter Family Foundation • Trustees of Sears and Other Funds

\$500–999
Barbara Nan Grossman Family Charitable Foundation • Broderick Bancroft • Centre Cuts Corporation • Community Development

Corporation of Boston, Inc. • Market Street Trust Company • Midtown Home Health Services, Inc.

\$250–499
James Kelly & Sons, Inc. Landscaping Co.

\$100–249
Combined Jewish Philanthropies • Masscribes • The Robertson Trust/Elizabeth R. Whitters • State Street Foundation, Inc. Matching Gift Program • United Way of Central and Northeastern Connecticut • United Way of Massachusetts Bay • Amazon

GIFTS TO ROGERSON HOUSE:
INDIVIDUALS

\$10,000–24,999
Peter L. & Ellen Zane

\$1,000–2,499
Anonymous (1)

\$100–249
In memory of Joan Stockford: Brann & Isaacson, Dean & Suzanne M. Christensen/Pondside Book Club, Christine H. James

Up to \$100
Gail E. Horowitz • In memory of Joan Stockford: Kevin A. Butler, Elizabeth G. Deal, Wynelle Evans, Timothy & Elizabeth Groves, Melvin & Marge Hoagland, Nancy Kittredge, John W. & Patricia M. Lane, Donald & Hilda Nicoll, Katherine A. Tranquada, Cecilia C. Woodley

GIFTS TO ROGERSON HOUSE:
CORPORATIONS AND
FOUNDATIONS

\$10,000–24,999
Rochester Area Community Foundation

\$1,000–2,499
The Barrington Foundation, Inc.

\$100–249
Honoring the memory of Joan Stockford: Egg Clearinghouse, Inc.

GIFTS TO MT. PLEASANT HOME:
CORPORATIONS AND
FOUNDATIONS

\$25,000–49,999
Vincent Mulford Foundation

\$10,000–24,999
Charles F. Bacon Trust, Bank of America, N.A., Trustee • Charles H. Farnsworth Trust, Bank of America, N.A., Trustee

\$5,000–9,999
Bushrod H. Campbell and Adah F. Hall Charity Fund

\$2,500–4,999
Eastern Bank Charitable Foundation

GIFTS TO HONG LOK HOUSE:
CORPORATIONS AND
FOUNDATIONS

\$100,000 and above
Chinatown Trust Fund • The Harry and Jeanette Weinberg Foundation

\$10,000–24,999
The Wang Foundation

\$2,500–4,999
Cathay Bank Foundation

2015 FINANCIALS

Rogerson Communities' financial report for 2015 demonstrates that transformational philanthropy can have a tremendous impact on an organization. Because of special, one-time fundraising initiatives, and contributions received for the creation of new, affordable elder housing, Rogerson realized an extraordinary net gain for the year. These generous gifts were restricted for future projects to be undertaken in line with community needs, our mission and strategic plan, including the development of affordable housing. Philanthropic support of Rogerson's general operating costs, adult day health, and fitness programs continues to enable the organization to meet its yearly operating budget.

REVENUES	\$
Management & Consulting	3,202,107
Adult Day Health Programs	2,848,325
Contributions	3,331,010
Investments & Other Income	407,475
	9,788,917
EXPENSES	\$
Programs & Management	5,560,506
Staff & Administration	1,735,322
	7,295,828
NET ASSETS	\$
End of Year	25,240,698

You help us to
get it done!




ROGERSON
COMMUNITIES

Rogerson.org
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