



# Building Community

AT EVERY TURN



2022  
COMMUNITY  
IMPACT  
REPORT

*Two roads diverged in a wood, and I, I took the one  
less traveled by, and that has made all the difference.*

ROBERT FROST

**R**obert Frost, the great American poet, wrote a poem that is a favorite of mine: “The Road Not Taken”.

The poem is essentially an argument about the choices in life, big and small, since these choices determine our journey through life. As in the poem, through time and on any journey, we encounter forks in the road and need to make decisions. For Oakwood, the first new year in the decade of the 2020s was such a point—an inflection point.

For the first time in many years, we took a significant stride in reimagining and reinvesting in the University Woods campus. But more than just starting a building project, we began a new legacy.

The start of construction on the new Hebron Oaks building represents a bold step taken by Oakwood to create a unique and revolutionary center of care for residents and community seniors, unlike anything in the region.

This state-of-the-art project is a reflection of Oakwood choosing directly to be bold; to be a disrupter of conventional wisdom whereby today, new rehabilitation and skilled nursing centers simply aren't being built. We believe differently—care is still the fundamental mission of Oakwood and our staff.

As Frost wrote: “Two roads diverged in a wood, and I, I took the one less traveled by, and that has made all the difference.” This is exactly the summation of 2021 and where Oakwood heads now, boldly,

into the coming years. Our work continues and the core mission elements of care and stewardship remain. The challenge is to reimagine how these elements are lived out post pandemic, in a community that has increasing needs among seniors and a changing workforce.

What is apparent is that organizations such as Oakwood have a great calling to meet these challenges, and frankly, it is what our mission requires.

Our choice is not to follow a path of least resistance, but to be bold, to take on the most challenging of challenges; to lead going forward, and to be unabashedly proud of who we are, what our history is, and what our capabilities are. We know our choice of “path” will make all the difference for those we serve now and those we are called to serve in the future.



A handwritten signature in black ink, appearing to read 'R. M. Hislop, III'.

**Reginald M. Hislop, III,**  
*Chief Executive Officer*

## From Move In to

# Meaningful Community

**T**he movers have finished bringing your belongings into your new home at Oakwood. The walls are the colors you selected. Your couch fits perfectly. The view outside your windows is rich with natural beauty. Now what? Where do you find the menus for the campus restaurants? How will you meet your neighbors? When does the walking group meet?

Enter the floor representative, or “floor rep.”

“I was surprised at how overwhelmed I felt,” University Woods resident Mary Weaver says of the day she moved into Oakwood. One thing that helped ease her mind and feel welcome were some “little details” that her floor rep had seen to.

“We had a conversation when we were choosing our paint colors and I remember her saying to me ‘We’re so glad you’re moving in!’” On the day Mary and her husband Denny moved in, the floor rep had left a

handwritten card on the shelf outside of the Weavers’ door.

“I remember details of being welcomed, and they mean so much to me,” she says.

So meaningful were those little details, and the way they made the Weavers feel, they inspired Mary to become a floor rep herself. “I see the job of a floor rep as being a neighbor, and being able to pay it forward because someone was so good to us when we moved in.”

A nurse by trade, her floor rep role draws on some of the same skills Mary used in her career; namely being people-oriented.

The role of the floor rep doesn’t end after new residents have moved in, however. Just ask Prairie Ridge floor rep Holly Schuetz. Since becoming a floor rep in 2020 her floor hasn’t had any new move-ins, but her role remains important for her neighbors.



“

I remember details of being welcomed,  
and they mean so much to me.

MARY WEAVER



“

Just about every day, I count my blessings  
that I'm here at Oakwood.

HOLLY SCHUETZ



Holly represents her building and raises any concerns or questions they might have at regular meetings with Resident Association members. She also plans social gatherings for residents of her building, along with the “social team” which consists of a resident from each of the five floors in her building.

“Everyone has such great ideas and different skills, so from that pool of ideas we make plans for what we’ll do.” Holly says.

Holly had served on association boards at previous residences and had decided she was done with that kind of service before coming to Oakwood. Life, as it happens, had other plans for Holly.

“There was an inexplicable pull inside of me that told me I had to get more involved. That’s been the key to (my husband) Larry and I being in love with being at Oakwood—getting to know the wonderful people here and their backgrounds.”

The connections and interactions Holly, Mary, and their fellow floor reps help make for others through their roles are a key part of what makes Oakwood feel like home.

“Just about every day, I count my blessings that I’m here at Oakwood,” Holly says.

# Support and Enrichment

## Through the Aging Process

Oakwood has become a part of our family,” Sue Racine says, adding “and my brother David and I have really leaned on the Oakwood team.”

Sue’s parents, Jim and Dorothy Batt, have called the University Woods campus home for the last 10 years. Jim’s first experience with Oakwood was in Hebron Oaks, where he recovered from a surgery. Following his stay, he and Dorothy moved into independent living.

“It was a family decision for mom and dad to move to Oakwood, but Oakwood was the number one choice because of its reputation in the community,” Sue explains.

Jim and Dorothy eventually moved into Tabor Oaks assisted living together, where they lived until their health needs required a move to memory care for Dorothy and Hebron Oaks for Jim.

“The growing old process can be challenging and scary,” Sue says. “I’ve seen the kindness of the Oakwood staff stepping up and providing support and understanding as my folks have gone through the steps of aging.”

*Sue Racine on her way to visit her  
parents on the University Woods campus* ▶



“

Oakwood was the number one choice because of its reputation in the community.

SUE RACINE

Despite living in different households, the Life Enrichment team ensures that Jim and Dorothy are together twice a week.

“It goes above and beyond the fundamentals of food, shelter and medical care. The staff understand the complexities of aging,” Sue adds.

From the beginning of their time at Oakwood, “opportunities for our parents to further enrich their lives through fellowship and continuing education were myriad and marvelous,” David says.

Having spent his career in the arts, Jim was drawn to Life Enrichment offerings at Oakwood related to theater, clay, painting and Shakespeare. Dorothy was trained as a nurse and worked as a librarian. At Oakwood, she joined the retired nurses’ group.

Sue shares, “Oakwood is allowing them to continue growing in their later years in a safe, loving place.”



# Generous Donors

The people who live and work at Oakwood are passionate about building community.

This is why so many generously support the work of the Oakwood Foundation. From helping Oakwood cover the cost of care for those who have outlived their resources, to improving spaces and programs on our two campuses, to recognizing the work of our caring and dedicated staff; donors improve the lives of residents and help strengthen our organization for the future.

IN 2021, DONORS TO THE  
OAKWOOD FOUNDATION INCLUDED

**210**

UNIVERSITY WOODS  
RESIDENTS

**212**

PRAIRIE RIDGE  
RESIDENTS

**122**

STAFF MEMBERS

**H**ebron Oaks has cared for generations of older adults in Madison. Those receiving services and support at Hebron today share memories of visiting their parents and grandparents years ago; experiences that led them to choose Oakwood when they needed care.

While the dedication and compassion demonstrated by Hebron Oaks staff remains constant, the 60-year-old building no longer meets the needs of Oakwood and the greater community. This is why the construction of a modern skilled nursing and rehabilitation center, allowing Oakwood to build upon its history of service, is so important and exciting. It's about what it means to the Madison community.

As providers who serve older adults are discontinuing their skilled nursing services, or simply building

apartments with no additional support available when needed, Oakwood is reinvesting in its core mission of caring for older adults.

Hebron Oaks will focus on restoring the health of those recovering from surgery or a serious health event. Patients in need of skilled care and rehabilitation will recover in modern, comfortable one-bedroom suites.

Oakwood is also using this opportunity to expand the services it offers. The building will include four bariatric suites, allowing Oakwood to serve larger older adults in thoughtfully designed spaces accommodating lifts and larger wheelchairs. A new bistro on the first floor will offer convenient and delicious dining options. An expanded pharmacy and new rehabilitation gym will be designed to better serve residents. A dedicated palliative care and

# Serving the Community

## With Exceptional Skilled Nursing Care

hospice wing will provide University Woods residents with a place to spend their final days on the Oakwood campus.

Several features of the project will honor the tradition and character of our organization. A Serenity Room will be included in recognition of the importance of faith at Oakwood, providing patients and families with a quiet space to visit or simply reflect. Most rooms will look out upon oak trees and green spaces, incorporating nature into the healing process. The inclusion of a green roof off the palliative care wing acknowledges the importance of access to nature for all, regardless of ability.

Madison will be better served with the new Hebron Oaks Skilled Nursing and Rehabilitation Center.



*Construction is underway on the new Hebron Oaks Skilled Nursing and Rehabilitation Center at University Woods. Follow the progress:*





# Sustaining Connections in the Face of Isolation

A sense of belonging and feeling valued are not always easy to come by for older adults who are unable to leave their homes. The “pandemic of isolation” among older adults was identified long before COVID-19 emerged but has only worsened since. Care Team Ministry is an effective response—reaching out to isolated adults and building community through service.

Care Team Ministry volunteers visit older adults on an ongoing basis, building relationships and constantly providing reminders they are still valued members of the church community.

When in-person visits are not advisable, volunteers stay connected by sending letters

and greeting cards, and by telephone. When in-person visits are possible, Care Teams offer an array of non-medical services to aging adults including assistance with mail correspondence, household organizing, and similar tasks. Care Team volunteers also share news from the congregation and might bring a printed devotional or other publication from the church. At the heart of the ministry are the visits of sustaining presence.

The Oakwood Foundation has worked with Catholic Charities since 2007 to serve older adults in the greater Madison area through Care Team Ministry and supports the program with a \$30,000 annual grant. This grant makes



Community is built through a ripple effect that starts with visits to the individual; family values the service to their loved one, the older adult feels gratitude and connection to the church, and volunteers feel more connected through meaningful service and being part of a team while enjoying the company and wisdom of older adults.

it possible for Catholic Charities to train and maintain Care Teams at 17 Lutheran and Catholic churches. All volunteers are screened through background checks and thoroughly trained in topics related to elder care. Care Team members abide by the ethics of respectful and compassionate care, confidentiality, and services offered without discrimination.

Through Oakwood Foundation's financial support, Care Team Ministry also provides volunteers with ongoing education opportunities throughout the year, covering topics such as dementia care, community resources for the elderly, and caregiver self-care.

*Marsha Edl-Ralston visits with Valeria at her Assisted Living residence* ▶

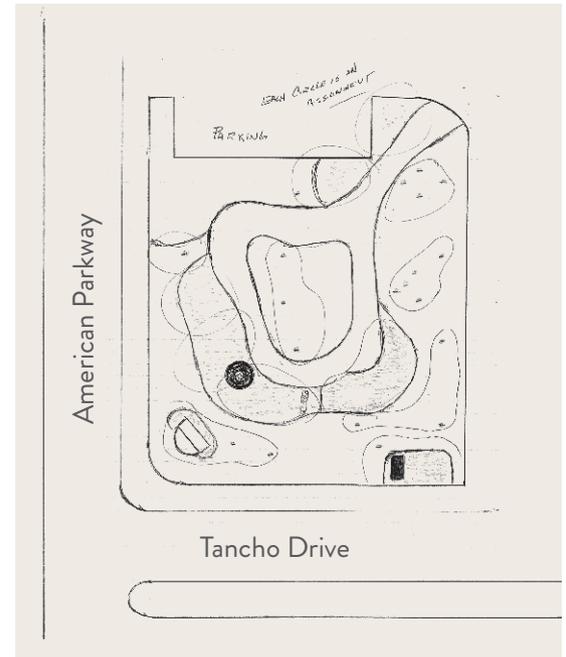


# Changing the Nature of Community

One thing Oakwood is most known for is the beautiful natural settings of both of its campuses. It comes as no surprise that many Oakwood residents are nature lovers, whether gardeners, bird watchers, or general outdoor enthusiasts.

While Oakwood employs a horticulture team on each campus, resident groups have formed and taken ownership of the care of certain treasured areas.

At Prairie Ridge, the Friends of the Corner Park was formed in 2019 following the completion of the Grasslands. The Corner Park is located just south of The Grasslands, near the intersection of American Parkway and Tancho Drive. The site of the park was previously occupied by a home that was purchased and removed from the Oakwood property in 2005.



A sketch illustrates zones assigned to Friends of the Corner Park at Prairie Ridge

Residents work to improve their environment and build community in the process.

Joe Belisle refills the bird feeders in the Corner Park





The Corner Park is something we can all be very proud of. When people visit Prairie Ridge, it's the first thing they see and we love that.

JOE BELISLE



Since that time, Oakwood residents have enjoyed the mature trees and natural beauty that the space offers to the campus. When Prairie Ridge campus renovation began at the end of 2017, residents were eager to preserve and enhance this campus gem.

Once the buildings were complete, the corner lot caught the eyes of new Grasslands residents Dale and Lila Ann Mathwich. Their generous contributions to the Oakwood Foundation made possible the park that we see today, complete with plantings, paved path, benches, bird feeders and new campus signage.

“Dale got everything pretty well organized and then he got this group together,” Joe Belisle recalls. Joe is the Team Organizer of the Friends of the Corner Park, a group of independent living residents who each care for the park.

In the spring the Friends do a cleanup together, and the rest of the warm months each Friend is responsible for maintaining a section, which may include weeding and removal of trash.

The Corner Park has become a popular destination for Oakwood residents, staff and wildlife. In the summer months, the three bird feeders have to be filled daily to keep the birds satisfied.

“The Corner Park is something we can all be very proud of. When people visit Prairie Ridge, it’s the first thing they see and we love that,” Joe says.

On the University Woods campus, the nine-acre Nature Preserve has captured many hearts, and has inspired its own group of residents committed to maintaining its beauty. The Nature Preserve Committee consists of 10 residents, two Oakwood staff liaisons and two representatives of the Kiwanis Club of Downtown Madison.

The Nature Preserve Committee has five main objectives in their management plan for the Preserve:

- 1) Remove invasive plants, dead trees and shrubs
- 2) Plant native trees, shrubs, and herbaceous plants
- 3) Maintain walking trails that allow visitors to experience and enjoy the flora and fauna of the Preserve in all seasons
- 4) Publicize the Preserve to encourage visits by Oakwood residents and the general public
- 5) Encourage donations to the Oakwood Foundation directed at supporting costs for maintaining and enhancing the Preserve

◀ Dale (left) and Lila Ann Mathwich (center) organized the Friends of the Corner Park at Prairie Ridge. Joe Belisle (right) is among those who generously volunteer their time.

Nature Preserve Committee Chair Marv Beatty has called the Nature Preserve “Oakwood’s Green Cathedral.”

As an Emeritus Professor of Soil Science, Marv has found community with his fellow committee members. Their efforts include planting three to four young oak trees every year in the Preserve—thus far totaling over 80 trees. In addition to trees, the committee has been responsible for planting many native species of plants in different areas of the Preserve.

The committee is broken down into six subcommittees, including Woodland Wildflower & Ephemerals, Forest Management, Invasive Plant

Control and Information & Education. It’s clear the goal of their efforts is to help foster a place that can be enjoyed by all—young and old, Oakwood residents and non-residents.

When the prairie plants are in full bloom, the committee hosts “Prairie Festival Days” where guests are invited to come out to the Preserve, enjoy refreshments and chat with members of the committee.

“The Preserve is a tremendous asset, not only to Oakwood, but to the entire Madison community,” Marv says, “it’s one of those little micro gems where one can step away from the urban into something that is more natural.”

The Nature Preserve Committee is working to enhance the Preserve as a thriving ecosystem of oak, hickory and other native trees with an understory of native woodland and prairie plants similar to the vegetative cover here at the time of European contact, and to make the Preserve accessible to visitors.



◀ No matter the season, the Nature Preserve brings University Woods residents together



# A Public Health Inflection Point

The availability of onsite flu shots and COVID vaccines through the Oakwood Pharmacy is a major benefit to residents and staff at Oakwood.

COVID-19 VACCINATIONS IN 2021

**1,609**

FLU SHOTS IN 2021

**737**



# Turning Health Around for Older Adults

**W**hile the COVID-19 pandemic has profoundly impacted the skilled nursing industry, reducing the number of elective surgeries for older adults and creating workforce challenges, Oakwood has remained focused on community. Whether it was caring for older adults recovering from COVID-19 or helping someone recover following a health emergency, Oakwood staff did so with skill and care.

In 2021, our talented physical, occupational and speech therapists, in partnership with our compassionate caregivers, returned 215 individuals safely to their homes outside of the two Oakwood campuses.

TOTAL REHAB DISCHARGES

438

REHAB DISCHARGES OF  
NON-OAKWOOD RESIDENTS

215

REHAB DISCHARGES OF  
NON-OAKWOOD RESIDENTS

49%

OF REHAB PATIENTS WHO  
RETURNED HOME IN 2021  
DO NOT LIVE AT OAKWOOD





# Employee Appreciation

Thanks to the generous support of our donors, the Oakwood Foundation was able to distribute over

# \$250,000

IN GIFTS TO EMPLOYEES IN 2021

Oakwood employees received checks ranging from \$200 to \$700 based upon their length of service and number of hours worked.

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In 2021, Oakwood was the 35th largest employer in Dane County with

# 750

EMPLOYED INDIVIDUALS

# Reflecting Our Community

As a top employer in Dane County and a provider of housing and services, Oakwood values diversity, equity and inclusion. We strive to create an environment where all feel comfortable and welcome, knowing it will be an ongoing pursuit.

The data below illustrates Oakwood's workforce as a reflection of our community in 2021.\*

## OAKWOOD



## MADISON



## DANE COUNTY

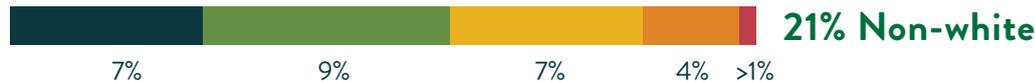


## Oakwood embraces diversity in the workforce

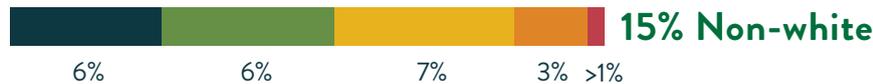
### OAKWOOD



### MADISON



### DANE COUNTY



Black or African American
  Asian
  Latinx
  Multiracial
  First Nations

\*Madison and Dane County demographic data courtesy of [www.census.gov](http://www.census.gov) and is current as of April 2020. Oakwood demographics reflect 2021 data.

# Monthly Ministry Program

Oakwood supports community not-for-profits through our Monthly Ministry program.

Thanks to the generosity of the Oakwood Village Prairie Ridge Spiritual Life Committee and campus donors, support of area not-for-profits through the Monthly Ministry continued to grow in 2021.

The Monthly Ministry program supports primarily local organizations doing great work in the broader community. Spiritual Life committees made up of Oakwood residents determine the not-for-profits that benefit from gifts received through our Monthly Ministry program.

Organizations who received a gift of support in 2021 include:

Bashford United Methodist Church  
Food Pantry

Bethel Food Pantry

Briarpatch Youth Services

Community Action Coalition for  
South Central Wisconsin

Grace Episcopal Food Pantry

JustDane

Lutheran Disaster Response

Madison Area Jail Ministry

Porchlight, Inc.

The Road Home

St. Stephen's Food Pantry

## Dollars donated annually through Oakwood's Monthly Ministry program



## A Call to Action

On the night of December 10, 2021, more than 30 tornadoes ripped through six states wreaking havoc. The State of Kentucky felt the worst of the destruction.

Residents of Oakwood Village Prairie Ridge quickly took action, raising

# \$13,245

in support of Lutheran Disaster Response and their work helping those impacted by the devastation.

## Local Spending

# \$24.3M

spent on vendors in the state of Wisconsin in 2021

In addition to serving older adults in south central Wisconsin, Oakwood is proud to contribute to the health of our State's economy.

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## Payment for Municipal Services

# \$187,723

paid by Oakwood to the City of Madison for  
Municipal Services in 2021.

*In 2001, Oakwood agreed to pay the City of Madison an annual Payment for Municipal Services. Oakwood was the first not-for-profit senior housing provider in the area to work with the City on this issue; many non-profit providers in Madison do not make a similar payment.*

# Community Partner Program

The Oakwood Foundation gratefully acknowledges the following business partners who have made the decision to support our organization as an Oakwood Community Partner in 2022. Through their generosity, these businesses have expressed a commitment to serving the Oakwood community and provide additional resources to enhance our programs and services.

If you know individuals associated with these organizations, please thank them for choosing to support Oakwood as a Community Partner.

*If your business is interested in joining us as an Oakwood Community Partner, we welcome your support. Call (608) 230-4441 to learn more!*

## Gold Partner

Giving at the \$10,000 level



## Silver Partner

Giving at the \$5,000 level



## Community Partner Giving at the \$1,500 level

Alliant Energy

Econoprint

North American Mechanical, Inc.

Boelter

Husch Blackwell

Oimoen Electric, Inc.

CLA

M3 Insurance

Theracore Management Group

Coyle Carpet One

Madison United Healthcare Linen, Ltd.

Parasol Alliance

Cricket Design Works, Inc.

Monona Plumbing and Fire Protection, Inc.

VRI

CTW Abbey Carpet and Floor

# Continuing Care Endowment Fund

Your gifts to the Oakwood Foundation help Oakwood care for those who have outlived their resources.

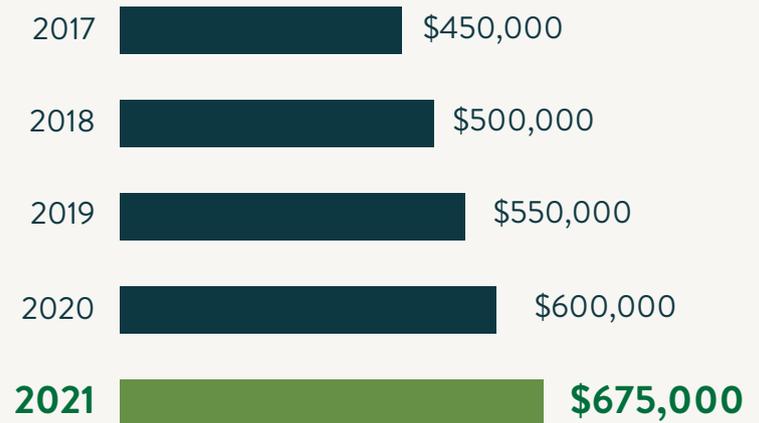
When donors support the Oakwood Foundation's Continuing Care Endowment Fund, they are helping Oakwood provide care to those who need it most. Each year, the Oakwood Foundation uses a portion of its endowment fund to help Oakwood sustain operating losses incurred caring for low-income Oakwood residents and residents who have run out of money through no fault of their own.

In 2021 the Continuing Care Endowment Fund covered approximately 27 percent of Oakwood's charitable care. Your gifts are expanding the impact of the endowment fund, and are helping the Oakwood Foundation achieve its long-term goal of covering 100 percent of Oakwood's charitable care.

You are relieving Oakwood's financial burden while helping us stay true to our mission and history by continuing to serve those who have outlived their financial resources.

In 2021, the Oakwood Foundation contributed **\$675,000** toward care.

## Endowment Fund Support



*If you'd like to support the Continuing Care Endowment Fund, please go to **[oakwoodvillage.net/support](https://oakwoodvillage.net/support)** or call **(608) 230-4441***

# Oakwood Provides Charitable Care

In 2021, Oakwood provided **\$2,535,636** in unreimbursed care and services to older adults.

This total includes care provided to skilled nursing Medicaid patients, assisting living residents on the Family Care program, residents living at Oakwood under the HUD voucher program, and special contracts. The number represents the difference between Oakwood's actual reimbursements through these programs for providing services and the income Oakwood could have realized by charging market rate.

## Total Unreimbursed Care and Services



*Medicaid is the State of Wisconsin's health care funding source for the indigent. Family Care is a Medicaid program which provides long-term care and services to help frail elders.*

*"Special contracts" refer to situations where Oakwood takes on the cost of care for an individual who has outlived their financial resources and is not eligible for public funding support.*

# Oakwood's Sponsoring Congregations

Oakwood was established by an association of Lutheran churches who believed Madison could – and should – offer quality care and services to older adults. We are grateful for the continued support of our sponsoring congregations:

Advent Lutheran Church ELCA, *Madison*

All Saints Lutheran ELCA, *Fitchburg*

Bethel Lutheran Church ELCA, *Madison*

Bristol Lutheran Church ELCA, *Sun Prairie*

Burke Lutheran Church ELCA, *Madison*

Christ Lutheran Church ELCA, *DeForest*

the Church at Christ Memorial LC-MS, *Fitchburg*

Good Shepherd Lutheran Church ELCA, *Madison*

Hope Lutheran Church ELCA, *McFarland*

Immanuel Lutheran Church LC-MS, *Madison*

Immanuel Lutheran Church ELCA, *Mt. Horeb*

Lakeview Lutheran Church ELCA, *Madison*

Luther Memorial Church ELCA, *Madison*

Lutheran Church of the Living Christ LC-MS, *Madison*

Messiah Lutheran Church ELCA, *Madison*

Midvale Community Lutheran Church ELCA, *Madison*

Mount Olive Lutheran Church LC-MS, *Madison*

New Heights Lutheran Church ELCA, *Black Earth*

Norway Grove Memorial Lutheran Church ELCA, *DeForest*

Our Savior's Lutheran Church ELCA, *Sun Prairie*

Peace Lutheran Church ELCA, *Waunakee*

Spring Prairie Lutheran Church ELCA, *DeForest*

St. James Lutheran Church ELCA, *Verona*

St. John's Lutheran Church ELCA, *Madison*

St. John's Lutheran Church ELCA, *Prairie du Sac*

St. Luke's Lutheran Church ELCA, *Middleton*

St. Mark's Lutheran Church ELCA, *Madison*

St. Martin's Lutheran Church ELCA, *Cross Plains*

St. Paul Evangelical Lutheran Church LC-MS, *Madison*

St. Peter's Lutheran Church LC-MS, *Arlington*

St. Stephen's Lutheran Church ELCA, *Monona*

Trinity Lutheran Church ELCA, *Madison*

United in Christ Lutheran Church ELCA, *Morrisonville*

Vermont Lutheran Church ELCA, *Black Earth*

West Middleton Lutheran Church ELCA, *Verona*

# Oakwood Lutheran Senior Ministries Board of Directors

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**Dan Stein**

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**Stan York**

Executive Director (Retired),  
Wisconsin Association of Homes for the Aging

# Core Values



**Compassion** We care deeply about the people we serve and the people that we work with on a daily basis to create a community of caring.



**Faith** As a Lutheran organization, faith is a core value. Faith goes beyond religion to a deep honoring of the human spirit.



**Inclusion** We strive to consider different perspectives to create fair, welcoming, and accessible experiences for all.



**Integrity** Oakwood is built on trust. Our teams work to be transparent and fair.



**Dedication** We view our work as a calling. We are here for each other.



## People Thrive Here

Oakwood consists of two vibrant communities of exceptional people who share, listen, and grow together. We are united in the belief that every interaction matters. We focus first and foremost on the wellness of our residents. We recognize the quality of our care rests on the quality of our staff, so we empower staff to do their work well and lend a hand when it's needed. As a not-for-profit organization, we reinvest in our community with the goal of being the best in our industry.



## OAKWOOD

OAKWOOD LUTHERAN  
SENIOR MINISTRIES

6205 Mineral Point Road  
Madison, WI 53705

Non-Profit Organization  
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