

2023
COMMUNITY IMPACT REPORT

GROUNDING & GROWING



A photograph of a person sitting on a wooden bench in a park. The person is wearing a dark purple jacket and a camouflage hat, looking towards the left. The background is filled with trees with vibrant autumn foliage in shades of yellow, orange, and green. The scene is bright and sunny.

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What We Stand For

Celebrating

75 Years of Building Community at Oakwood

Over the past seven and a half decades, Oakwood Village has established itself as the most trusted name in senior living in Madison. Our reputation is hard-earned, built over decades of consistent top-quality care and services.

We are exceptional thanks to the countless hours of care and compassion shown by generations of Oakwood employees.

Our services are enhanced by the dedication of Oakwood volunteers who, most often because of a personal connection to someone living at Oakwood, give their time to make our community a better place. Board members share their talents and expertise for the sole reason that they value Oakwood and want to see the organization succeed. Donors generously support us, recognize the important work we do, and allow us to do even more.

Perhaps most importantly, we are known for the caliber of people living on our two campuses. It is their diversity of life experiences coming together for a common purpose, and their interest and concern for one another in retirement, that makes Oakwood remarkable.

Each phase in Oakwood's history has presented opportunities and challenges. The current labor market, unprecedented in our 75-year history, is the most significant challenge facing Oakwood and all providers like us today.

Yet reasons for optimism abound, such as the opening of a new state-of-the-art skilled nursing and rehabilitation center, the introduction of home health and hospice services to better care for Oakwood residents, and continued high demand for housing and services at Prairie Ridge and University Woods.





Like the rings on a tree, each season of life stays with us and shapes how we grow into the next one. And – just like those we serve – we’ve discovered that aging isn’t the end of growth and learning. It’s the beginning. We look to the future with excitement and anticipation.

**A remarkable
achievement to
serve seniors in
our community**

GROUNDED



Oakwood

Lutheran Homes

6410 Mineral Point Road

Providing

a Safe Community for Our Elders

Throughout our history, starting with our founding by a group of Lutheran congregations 75 years ago, Oakwood has evolved and responded to the needs of our community.

Oakwood began with the interest of parishioners at St. John's Lutheran Church in the creation of a "home for the aged" in Madison. The Lutheran Home in Fond du Lac, which had been founded and run by a league of surrounding Lutheran congregations, was seen as a model. Parishioners of St. John's felt that Madison churches could provide the same sort of support that Fond du Lac's churches did for their elderly members. St. John's, St. Luke's, Zion, and Bethel were among the churches that led the efforts to establish Oakwood Lutheran Homes Association.

Oakwood has evolved and responded to the needs of our community.

The years after the Second World War marked a change in the way retirement was viewed. Whereas formerly the elderly could live in the large houses of their relatives amidst an extended family, homes were becoming smaller, and the "boom" of young, mobile families left less time for elderly relatives. At the same time, improved health, the introduction of social security a decade earlier, and a longer lifespan brought about the concept of retirement as the golden years, when travel, leisure, and companionship could be enjoyed.

The founders of Oakwood believed in providing "ambulatory care" for the elderly: supervised support for people who needed a bit of help with daily tasks. We thrive today because of the foresight of our sponsoring Lutheran congregations, who recognized the need for quality housing and care for older adults in the 1940s.

Changing

for the Better

In the mid-1990s, as Oakwood was celebrating the 1992 opening of its new assisted living facility, Tabor Oaks, it also was becoming more acutely aware of an unresolved concern: the safety of residents suffering from dementia.

Unfortunately, the Tabor Oaks design made it extremely difficult to monitor residents suffering from advanced dementia. While Oakwood offered three levels of care to meet the physical needs of residents – independent living, assisted living, and skilled nursing – serving those with memory loss was becoming increasingly challenging. Following multiple situations involving residents wandering and putting their safety at risk, we knew we had to act.

Initially, Oakwood created a memory care unit in a wing of its nursing home, Hebron Oaks. While staff did a wonderful job providing dementia programming and security, the transition for most residents was overwhelming. Moving from a “residential care model” to a “nursing home

model” remained problematic. The latter was medically focused, bound by strict state nursing home regulations, and restrictive for those who were still very much mobile and needing space to move around. Oakwood needed to address not only safety, but also provide an environment that supported engaging programming and quality of life.

This need led to the design and construction of Covenant Oaks, an assisted living facility that met new industry standards of functionality and security for those with dementia. Knowledge of a passcode was needed to enter or exit the program. Resident living spaces were broken up into small households, each with their own living and dining areas plus access to a secure outdoor courtyard. This design was intended to offer continued opportunities for engagement and programming while ensuring adequate staff support.

When the building opened in 1999, this concept was new to the Madison area, and Covenant Oaks would receive national recognition for excellence in memory care assisted living design, as well as the 2001 Wisconsin Alzheimer's Association award for outstanding care.

Former Oakwood Executive Directors Peter Viviani and John Noreika break ground on Covenant Oaks in 1998. ▶



Planting

Roots Throughout the Madison Area

For decades, Oakwood Village consisted of one campus, located on Mineral Point Road. This changed in August of 2000 with the opening of Pioneer Prairie, the first apartment building on the campus of Prairie Ridge (at the time called Oakwood Village East).

Plans for a second campus in the late 1990s came about not for financial reasons or a desire to grow and expand, but rather in response to our sponsorship of Lutheran congregations.

The pastors representing the Lutheran churches that made up Oakwood Lutheran Homes Association were looking out into pews increasingly filled with elderly persons, many living in homes that were not safe for them, and which they could no longer maintain. Congregations east of the Capitol did not feel well served by Oakwood's westside location.

Market research showed that the best location was on Madison's far east side, near Sun Prairie. Oakwood found several properties of sufficient size but soon zeroed in on open land next to the new American Family Insurance Campus, which was considered a perfect location for serving the immediate needs of Madison's older eastside neighborhoods. What's more, it was also close to the growing suburbs of Sun Prairie, DeForest, and Cottage Grove, budding markets which we knew would become increasingly important to us.

Today, as a result of Oakwood responding to our association churches, Oakwood Village Prairie Ridge thrives and meets a critical community need, offering high-quality senior living options across 277 apartment homes, 73 assisted living suites, 40 skilled nursing suites, and 20 memory care suites.

*Construction of Prairie Ridge campus
in 2000, and Prairie Ridge today.*





Prairie Ridge offers high-quality senior living options across

- 277** apartment homes
- 73** assisted living suites
- 40** skilled nursing suites
- 20** memory care suites

Investing

in Ourselves and Community

At our core, we're centered on providing skilled nursing care to people in need. The original Hebron Oaks skilled nursing building at University Woods dates back to the early 1960s. Additional wings were added in 1968 and in the 1980s.

The care provided at Hebron Oaks has continued to be exceptional, thanks to dedicated, compassionate caregivers and a supremely talented therapy team. However, the building reached a point where it could no longer adequately meet the needs of those we serve. The aging building was in need of several major costly repairs and upgrades, including roofing, HVAC, windows, and plumbing.

Thus, the opening of a new Hebron Oaks Skilled Nursing and Rehabilitation Center this March marked an important milestone in our 75-year history. It is a recommitment and reinvestment in who we are. It is a recognition that skilled nursing care is at the heart of Oakwood's mission.

The new building offers 60 one-bedroom skilled nursing suites, including a 12-bed wing dedicated to hospice care. On-floor dining, a spa and salon, the new Hilltop Cafe, and a spacious therapy gym offer conveniences for both residents and staff. A beautiful Serenity Room provides space for quiet and contemplative pause.

The building also includes a number of essential features that will benefit the entire University Woods campus, such as a new central kitchen to serve the campus health care programs; a transportation bay where patients can safely be dropped off and picked up for a skilled nursing stay; an indoor walkway ensuring those on campus can visit without needing to go outdoors; a larger, more thoughtfully-designed pharmacy; and a new campus loading dock, which eliminates much of the heavy traffic previously impacting the campus.

GROWING

*The Serenity Room, located
in the new Hebron Oaks.*



The new Hebron Oaks will meet the care needs of seniors both today and tomorrow. The state-of-the-art building will help attract caregivers to provide needed care for our community. Hebron Oaks will ensure Oakwood will continue to offer a true continuum of care to the residents living on our campus for decades to come.



Expanding

Our Canopy of Care

Spend a few hours in the main lobby of either Oakwood campus on any given day, and you'll witness a bustling scene. Among the many visitors making their way on and off campus are community health care providers coming to serve Oakwood residents.

In light of the number and variety of off-campus providers on campus, we assessed what services our residents are hiring out that we are not offering. This assessment has led to the creation of Oakwood Preferred Services, which now offers Home Health, Supportive Services, and Hospice services to residents living on Oakwood's two campuses.

Evaluating the number and variety of non-Oakwood caregivers serving Oakwood residents forced us to ask questions: Why do so many residents feel the need to supplement the care provided at Oakwood with outside providers? Should we be meeting these needs? Are there gaps in our continuum of care? Can't we serve our own residents better, as the communication

between our caregivers and other members of our interdisciplinary team will surely benefit those we serve?

While residents and families can still choose to bring in outside services, they now have a premier option: Oakwood Preferred Services.

Oakwood Preferred Home Health is intended to serve residents returning to their home at Oakwood (whether "home" is an apartment home, assisted living, or memory care suite) from skilled nursing or the hospital. We can provide home health services to residents in need of nurse-supervised care – such as individuals in need of wound management – along with assistance with a complex medical condition, and physical, occupational, and speech therapy. For residents who meet specific criteria, these services are covered under Medicare.

Oakwood Preferred Supportive Services are available to Oakwood residents on a private pay basis, and may include assistance with showering



Running a successful adult day care in 2000 has grown into Oakwood Preferred Services. The team provides skilled rehabilitative nursing, physical therapy, occupational therapy, and speech therapy as well as supportive services and hospice services.



and bathing, medication reminders, laundry, meal preparation, transportation, and similar services. We partner closely with our campus Health and Wellness teams in offering these services, but Supportive Services is intended to serve residents for longer periods of time.

Oakwood Preferred Hospice provides support to residents at the end of life here on the Oakwood campus. Residents with complex care needs can receive end-of-life care in our skilled nursing buildings, but the majority of people receiving hospice services do so in their home (again, at Oakwood, this means in their apartment home, assisted living, or memory care suite). This is a blessing in particular to those residents with spouses on campus, for whom traveling to another location to visit a loved one is not always easy.

The addition of Oakwood Preferred Services represents acknowledgment and an extension of Oakwood's continuum of care. As in the past, we have identified "gaps" in our services and are taking action to meet the needs of our residents and our community.

If you are looking for additional support on campus, reach out to your social worker to understand how additional services offered by Oakwood can benefit you.



OAKWOOD
PREFERRED SERVICES

Prioritizing

Our Team

In 2022, the Oakwood Foundation established two new funds in an effort to support our employees.

Oakwood encourages employees to pursue continuing education in order to develop the skills and knowledge to better serve our community of older adults. Thanks to donor gifts, Oakwood is happy to provide educational support to all eligible employees.

Oakwood Education Grants are available to full and part-time employees who have a minimum of six months of service at Oakwood. Eligible employees may apply for as much as \$3,000 a year by submitting a brief application and providing a copy of the tuition bill or invoice.

The Employee Emergency Aid Fund supports requests to assist with health or hardship situations for an employee, their spouse or a child, or in cases of a disaster (fire, flood, or a natural disaster) impacting an employee's primary residence.

Employees are already benefiting from these funds. Your generous gifts to the Employee Education Fund and the Employee Emergency Aid Fund means funds will be available when staff members need our help.

Thank you for your support.



Commending

Essential Workers



Health care needs dedicated caregivers like those working throughout Oakwood's two campuses.



Thanks to the generous support of donors, the Oakwood Foundation was able to distribute more than

\$305,000

IN GIFTS TO EMPLOYEES IN 2022



Full-time Oakwood employees received checks ranging from **\$400 to \$800** based upon their length of service and hours worked. Thank you to them for their service!

In 2022, Oakwood was the **38th largest employer** in Dane County with

750

EMPLOYED
INDIVIDUALS

Monthly Ministries: Helping Local Non-Profits Grow

Thanks to the generosity of the Oakwood Village Prairie Ridge Spiritual Life Committee and campus donors, our support of area not-for-profits through the Monthly Ministry continued to grow in 2022.

The Monthly Ministry program supports primarily local organizations doing great work in the broader community. Oakwood residents serving on the Prairie Ridge Spiritual Life Committee determine the non-profit organizations that benefit from gifts received through our Monthly Ministry program.

Oakwood Monthly Ministry Program Annual Donation Totals



2022 Gift Recipients

ST. STEPHEN'S FOOD PANTRY • LUTHERAN SOCIAL SERVICES
BRIARPATCH YOUTH SERVICES • THE SALVATION ARMY
COMMUNITY ACTION COALITION FOR SOUTH CENTRAL WISCONSIN
GRACE EPISCOPAL FOOD PANTRY • PORCHLIGHT, INC.
HABITAT FOR HUMANITY OF DANE COUNTY • BETHEL FOOD PANTRY
LUTHERAN DISASTER RESPONSE UKRAINE RELIEF FUND
JUSTDANE • AGRACE HOSPICE

STANDING WITH UKRAINE

On Feb. 24, 2022,
Russian forces
invaded Ukraine.

Millions of people fleeing the violence of war have moved toward Ukraine's western districts and neighboring countries such as Poland, Moldova, Slovakia, Romania, and Hungary.

There are major humanitarian concerns for both internally displaced people and refugees. Many Ukrainians have been left without basic necessities, such as food, water, shelter, and toiletries. Care for people also includes pastoral and psychological support to address the trauma they've endured.

OAKWOOD VILLAGE
RESIDENTS RAISED

\$28,650

in support of the Lutheran Disaster Response
Eastern European Crisis campaign.

Local Spending

\$22.1M

spent on vendors in the state of Wisconsin in 2022.

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

Payment for Municipal Services

\$182,666

paid by Oakwood to the City of Madison for
Municipal Services in 2022.

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.

2023 Community Partners

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 Corp

Ayres Painting

Coyle Carpet One, LLC

Cress Funeral and Cremation Service

Cricket Design Works

CTW Abbey Carpet & Floor

Econoprint, Inc

EUA

First Business Bank

Husch Blackwell

M3 Insurance

Mead and Hunt

Monona Plumbing & Fire Protection, Inc.

North American Mechanical, Inc

Oimoen Electric

Parasol Alliance

Rhyme

VRI

Continuing Care Endowment Fund

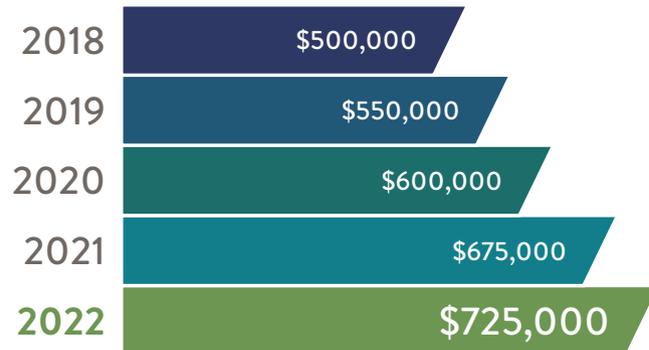
Your gifts to the Oakwood Foundation help Oakwood care for those who have outlived their resources.

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.

When donors support the Oakwood Foundation's Continuing Care Endowment Fund, they are helping Oakwood provide care to those who need it most. Your support of this important fund helps reduce the financial burden on Oakwood while helping us stay true to our mission and history by continuing to serve those who have outlived their financial resources.

In 2022, the Oakwood Foundation contributed \$725,000 towards care. This represents approximately 25% of Oakwood's total charitable care.

Endowment Fund Support



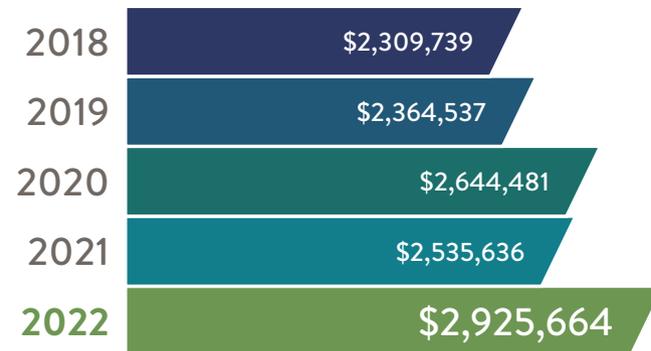
Visit oakwoodvillage.net/support or call **(608) 230-4441** to make a gift in support of the Continuing Care Endowment Fund.

Removing Barriers to Quality Care

In 2022, Oakwood provided **\$2,925,664** 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 vs. 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.

Donors Ensure People Thrive Here

The people who live and work at Oakwood care about the well-being of older adults.

This is why so many choose to give to the Oakwood Foundation. Their gifts help Oakwood cover the cost of care for those who have outlived their resources; improve spaces and programs on our two campuses; and help recognize the work of our caring and dedicated staff by funding celebrations and employee appreciation gifts.

Donors improve the care and services offered at Oakwood, support our employees, and help strengthen our organization for the future.

2022 Oakwood Foundation Donors

113

STAFF
MEMBERS

225

PRAIRIE RIDGE
RESIDENTS

187

UNIVERSITY
WOODS
RESIDENTS

384

COMMUNITY
MEMBERS



Building Connections in the Community

Oakwood, a founding member of the nonprofit AgeBetter, Inc., has had a significant role in the continued evolution of Sharing Active Independent Lives (SAIL). SAIL launched in 2005 as an innovative membership program for older adults; one of the first “village” models in the country and a charter member of the Village-to-Village Network.

SAIL members, volunteers, staff, community partners, educators, and screened service providers collaborate to assist older adults living in their own homes to remain connected, active, and safe. Helping one another is an appealing feature of SAIL among many members. Service and program offerings are driven by member needs, interests, and evidence-based information.



In the summer months, members Fred Ross and Don Haasl keep SAIL members moving and socializing during SAIL bike rides. L to R: Ed Walker, Fred Ross, Bev Flanigan, Joe Cassinelli, Mike Harder, Don Haasl

Oakwood recognizes not everyone can afford to live on our two campuses, and some older adults may prefer to remain in their house. By supporting SAIL, Oakwood can extend its impact and benefit those living beyond our walls.

While membership is affordable for many—at \$395 for an annual full membership or \$195 for annual associate membership—we want SAIL to be affordable to all. SAIL offers a sliding fee program for those who have low incomes.

In 2022, the Oakwood Foundation contributed \$20,000 to support SAIL operations and a sliding fee program ensuring members who have limited financial resources can benefit from SAIL membership.

Oakwood also provides SAIL with gift-in-kind support such as office space and business services.

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 Church ELCA, *Madison*
Bethel Lutheran Church ELCA, *Madison*
Bristol Lutheran Church ELCA, *Sun Prairie*
Burke Lutheran Church ELCA, *Sun Prairie*
Christ Lutheran Church ELCA, *DeForest*
Common Grace, *Madison*
Good Shepherd Lutheran Church ELCA, *Madison*
Hope Lutheran Church ELCA, *Madison*
Immanuel Lutheran Church ELCA, *Mount Horeb*
Immanuel Lutheran Church LC-MS, *Madison*
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 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 Lutheran Church LC-MS, *Madison*
St. Peter's Lutheran Church LC-MS, *Arlington*
St. Stephen's Lutheran Church ELCA, *Monona*
the Church, *Fitchburg*
Trinity Lutheran Church ELCA, *Madison*
Two Steeples Parish, *Blue Mounds and Mount Horeb*
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

Peder Moren, Chair

Chairman and Founding Member,
Food Fight Restaurant Group

Jill Derr, Vice Chair

Chief Financial Officer and Director
of Client Financial Organization,
Resonant Capital Advisors

Tom Hanson, Treasurer

Senior Vice President and
Chief Financial Officer (Retired),
Alliant Energy Corporation

Dan Stein, Secretary

President (Retired),
Second Harvest Foodbank

Dorothy Edwards

Faculty Director, University of Wisconsin-Madison
Collaborative Center for Health Equity

Joy Gänder

Owner,
Gänder Consulting Group

Barbara Gessner

Professor (Retired),
University of Wisconsin-Madison School of Nursing

Sarah Kruger (Ex-Officio)

Clinical Professor (Retired),
University of Wisconsin-Madison School of Nursing

Tom Rivers

Agency Services Manager (Retired),
American Family Insurance

Kelly Sitkin

Chief Development Officer,
American Brain Tumor Association

Calvin Williams

Instructor (Retired),
Madison College

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 VILLAGE

OAKWOOD LUTHERAN
SENIOR MINISTRIES

6205 Mineral Point Road
Madison, WI 53705

Non-Profit Organization
U.S. POSTAGE
PAID
MADISON, WI
PERMIT NO. 1980

GROUND
GROWING &

2023

COMMUNITY
IMPACT REPORT

www.oakwoodvillage.net