



GENEROSITY MATTERS

Your Gifts at Work



75 Years of Gifts

At the beginning, there were donors. George and Erna Vogel were especially crucial as they provided the land for Oakwood in 1948.

Pastors at several Madison Lutheran churches and the members of those congregations rolled up their sleeves and opened their wallets for the effort.

Fifty years later, Oakwood's goal expanded to helping older adults live independently while knowing that if they needed help, Oakwood would be there for them.

Gifts arrived in all sizes from churches, families, couples, and individuals as they shared their blessings to help older adults.

It is worth celebrating the vision, courage, and leadership of Oakwood's founders and early supporters. **Your generous gifts keep things going.**

Your gifts continue to enhance and support residents in all levels of care and lead the way into Oakwood's next 75 years. Thank you!

YOU BRING DREAMS TO LIFE

“My motivation comes from the memory of my mother who raised me to treat everyone I meet in an empathetic and respectful way. She taught me it is important to help your community and finding joy in helping someone who is unable to help themselves,” says Vincent Beyer, a Resident Assistant (RA) eager to work and move up the ladder.



Human Resources Talent Development Director Mary Bjorklund says that with your generous gifts, employees can advance and enrich their careers.

Your gifts provide opportunities for interested employees to become Certified Nursing Assistants (CNAs), which ultimately improves resident care through additional training.

Resident Assistants provide care in many areas, but according to Human Resources Talent Development Director Mary Bjorklund, Oakwood’s goal is to have as many CNAs as possible.

“The CNA training and the higher acuity levels we see with residents shows the extra training is a bonus. If they want to become a Registered Nurse, they need CNA certification first.”

Oakwood Village worked with Madison College to set up classes. Your gifts pay the cost of education for eligible employees, the exam fee, and provides a bonus for passing the CNA exam.

Beyer says that is a big deal.

“Oakwood donors allow me to focus on my education instead of having to worry about the financial burden of taking that first step.”

Since CNA classes were first offered for employees, Bjorklund says **35 have taken the class and more than 30 are now working at Oakwood as Certified Nursing Assistants.**

She calls the program a great recruitment tool. “People who go through the program are super excited. You come in as an RA and you have a certain wage, then you complete this program and you see a significant increase, that makes everybody feel good,” says Bjorklund.



The Employee Education Fund is helping Vincent Beyer work toward his CNA certification.

Your Gifts Send Oakwood Leaders Back to Class



By learning Spanish, Shayla Gitter can communicate better with Oakwood staff.

Shayla Gitter, a Human Resources Generalist at the Prairie Ridge campus, says she took Spanish in high school and college, but doesn’t remember much that is useful in the workplace.

Thanks to your generous gifts, Oakwood brought a virtual classroom to the workplace. Mary Bjorklund says the idea came from supervisors. “I had leaders come to say, ‘It’d be nice to communicate with my staff, even if it’s simply saying good morning or hello.’”

Gitter says she had a great experience. “I wanted to build a base layer of Spanish vocabulary that would allow me to have a better level of comfort conversing with someone who only speaks Spanish or is primarily a Spanish-speaker. I knew I wouldn’t become fluent by any means. I want to have some interactions verbally, and show that effort to potential candidates and/or employees.”

NEW DIRECTION, BRIGHTER TOMORROWS

Donors provide critical help every day at Oakwood, whether gifts support programming, training, employee education and appreciation, or when extraordinary times require help.

Oakwood has been contending with high costs due to hiring staff through temp agencies. Thanks to you and many generous donors, the Foundation is using the Continuing Care Endowment Fund to help Oakwood Lutheran Senior Ministries cover a larger amount of unreimbursed care.

Oakwood's Interim Chief Executive Officer Kevin Hayden says, "This generous gift from donors helps Oakwood move forward. Several efforts across both Oakwood campuses are underway to make sure we are providing top-notch care and the best place to live for all residents through the efforts of dedicated Oakwood team members."

The Oakwood Foundation Board of Directors approved a grant of up to \$3.2 million dollars in 2023 to address areas of need while the organization strives to become better financial stewards by managing Oakwood efficiently and effectively as a business.

Chairwoman of the Oakwood Foundation Board of Directors, Sarah Kruger, said, "While the care of older adults continues to bring challenges for many providers, we are hopeful there will be some stabilization in the issues that have challenged us, namely the need for updated facilities and services, and staffing demands. Management is carefully overseeing expenses, revenues and opportunities for innovation that will ensure Oakwood is here for our citizens for generations to come."



Donor gifts created a Serenity Room for residents, families, and staff.

The New Hebron Oaks

Your support added special touches to the skilled care and rehabilitation center.

The Serenity Room is available for residents and their families to use personally or as a place to meet with an Oakwood Chaplain. The two-story space is bathed in natural light and overlooks the green roof.

That roof provides two patios for residents in the hospice and palliative care wing to enjoy with their families. The environmentally friendly design of the roof will help maintain Oakwood's Nature Preserve by reducing runoff.

Thanks to a generous gift from the Margaret A. Lindberg Foundation, an Agility Park will be built to offer real-world challenges as people recover from surgery or serious health events. Planning is underway and installation is expected in 2024.

Your Gifts Bring the World!

Your support brings new experiences with virtual reality goggles.

Prairie Ridge Life Enrichment Supervisor Goldie Nelson says the new technology is also delivering joy. "You could see the smiles. You can see facial expressions behind the goggles showing a sense of wonder, like, 'Wow, I'm here.' They can go to the Sistine Chapel and the Grand Canyon. You see happiness, the effects of endorphins, even for residents in memory care, where they may not remember where they went. They still have those positive chemicals in their brain."



CHARITABLE GIFT ANNUITIES MAY BE WORTH A LOOK

For the first time, donors may use up to \$50,000 of a Qualified Charitable Distribution to create a CGA. Charitable Gift Annuities are gifts that return regular payments during the donor's lifetime.

Because payments are guaranteed, a CGA may be a good fit for some donors. Payout rates have increased three times in the past year. The Oakwood Foundation does not give tax advice, so we suggest you consult your tax advisor. Contact the Foundation to learn more.

WHAT'S IN A NAME?

Everything! Accuracy is crucial when naming beneficiaries. If you are considering the Oakwood Foundation, it's important to use our legal name, address, and tax identification number so your gift goes where you intend.

Name: Oakwood Foundation, Inc.

Address: 6201 Mineral Point Road
Madison, WI 53705

Tax ID #: 39 - 1398037

