



GENEROSITY MATTERS

Your Gifts at Work



"I enjoy making a difference in someone's life, putting a smile on their face, and making them feel loved and cared for; that's the best part of the job," says Sanu Jarjusey. Your gifts to the Employee Education Fund are helping Sanu earn her physician's license in the United States while she helps Oakwood residents.

Your Gifts Support Education Opportunities

You show your love for Oakwood employees with your generous gifts in appreciation of their hard work each year.

Now you can help them reach their education goals.

Sanu Jarjusey came to the United States from Gambia where she was a doctor. Now in Madison, she is working on becoming a doctor here. While she prepares to become a physician in the United

States, she is serving a resident assistant on the University Woods campus.

Your gifts to the Employee Education Fund help employees like her.

"Oakwood supported me by reimbursing part of my educational expenses," says Sanu. "It was beneficial because I could use the funds to study for my next exam."

CONTINUED ON PAGE 2

Another member of the Oakwood team, Fran Uselman takes care of residents in the Health and Rehabilitation Center (HRC) at Prairie Ridge. She recently finished the Registered Nurse program at Madison College, passed state boards, and is now an RN. She plans to pursue a bachelor's degree in nursing.

Your gifts to the Employee Education Fund help employees like Fran.

"The support from Oakwood has been phenomenal and took some of the financial burden off me as I work while trying to further my education. I really like working with people and helping them," says Fran.

Sanu and Fran are two of seven current Oakwood-supported scholars, and requests for assistance are growing. 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.

Your generous gifts to the Employee Education Fund means funds will be available when staff members apply and helps ensure Oakwood is supporting and growing its employees. In today's competitive labor market, this is an important program. Thank you for your support.



The Employee Education Fund is helping Fran Uselman work toward her nursing degree while taking care of residents in the Health and Rehabilitation Center at Prairie Ridge. "It's great to help residents recover and get strong enough to return home or to their prior living situation," shares Fran.

EMPLOYEE APPRECIATION FUND

Your support of the Employee Appreciation Fund allowed Oakwood to distribute over \$305,000 last year in employee appreciation gifts! Thank You! These gifts were distributed to employees at holiday celebrations on campus in December. Gifts may be made to the Employee Appreciation Fund throughout the year.



On-the-Job Training

Donor gifts to the Religion and Pastoral Care Fund are supporting a Clinical Pastoral Education (CPE) program at Oakwood Village.

Director of Religion and Pastoral Care Rev. Fr. Tyler Whatley, a Board-Certified Chaplain, is passionate about training future chaplains here at Oakwood.

“Hosting CPE is a concrete expression of Oakwood’s Faith Value – honoring the human spirit and the divine that lives within. It also serves a significant need locally; **Oakwood is now the only accredited site in the region for seminarians and theology students pursuing credits for ordination or their academic program,**” says Rev. Whatley.

CPE interns can also be longtime pastors transitioning into chaplaincy who are in need of additional education.

Rev. Whatley says the CPE program helps Oakwood residents by offering additional pastoral coverage, meaning more bedside visits, staff support, and programming. It also expands on-call coverage while interns get valuable experience and mentoring from Oakwood’s board-certified chaplain staff.

Merrie Beckman spends most of her time working with residents and staff in Hebron and Covenant Oaks. **“One crucial skill I am building as a Chaplain intern is being able to listen and reflect to staff and residents. I get to be the person, asking them about their feelings and emotions.** I am there to listen, not to poke or prod them,” says Merrie.

Thank you for making the Clinical Pastoral Education (CPE) program available at Oakwood!



Luis Velasquez is one of three CPE students currently benefitting from your support of the Clinical Pastoral Education program.

Chapel Mural Brings Nature Inside

You brought the outdoors inside the Tree of Life Chapel on the Prairie Ridge campus last year!

Your gifts to the Prairie Ridge Religion and Pastoral Care Fund made possible the creation of a mural. Madison artist Alicia Rheal collaborated with residents and staff on the project.

“At our initial meeting residents told me they wanted a mural that was peaceful, inviting, and would work well with the (chapel’s) beautiful windows,” says Rheal. “Residents did a fantastic job painting various birds and foliage.”



Residents and staff contributed to a mural project in the Tree of Life Chapel thanks to your support of the Prairie Ridge Religion and Pastoral Care Fund.

Madison artist Alicia Rheal coordinated the process and installation of the murals at Prairie Ridge. “It was a delightful experience working with Oakwood.”

CONTINUED ON PAGE 5



Chaplain Wayne Shannon says the artistic process was wonderful. “Folks seem to discover new things each time they look at the new mural. Now, some can’t imagine the chapel without it. We are blessed to be welcomed into the warmth of the chapel,” says Chaplain Shannon.

Betty Wendland, one of several residents on the planning committee for the mural installation is happy with the result. “I was really impressed with the artist who led the process. She was very knowledgeable and did a great job. It was a joy to see it installed,” says Betty.

Time for a Makeover!

Your gifts completed an overdue refresh in Oakwood Meadows, Oakwood Seasons, and Oakwood Knoll at Prairie Ridge.

Kitchens in Meadows and Seasons were updated and made more efficient with new flooring, cabinets, countertops, and appliances. In addition, the dining area and living room area of Seasons received new tables, chairs, and furniture. In Meadows, six new power lift chairs spruced up the living room.

In Oakwood Knoll, donor gifts worked inside and out, making possible the addition of 20 new chairs and four new activity tables. In the Knoll courtyard, all sidewalks and patios were replaced and gardens upgraded so residents and guests may safely enjoy the outdoors.





YOU MAKE A DIFFERENCE AT OAKWOOD VILLAGE!

Your gifts to the Oakwood Foundation help ensure Oakwood has the resources available to provide the exceptional care residents expect and deserve. *Thank you.*

The following grants were just a few of the grants approved by the Oakwood Foundation Board in late 2022 and provide examples of some of the many ways donors impact the Oakwood Community.

You helped Oakwood address unprecedented staffing challenges. A **\$4 million** grant was approved to help offset extraordinary costs associated with the overtime, agency, and incentive pay necessary to ensure residents receive needed care.

You provide training and skill-development opportunities for Oakwood employees. Over **\$250,000** in grants were approved, focusing specifically on staff training opportunities in 2023, including CNA training programs, Spanish language classes, supervisor development courses, infection prevention education, and Alzheimer's and dementia training.

You invest in new technology. A grant for **\$372,000** was approved to allow the Oakwood Pharmacy to install automated equipment that will dispense medications into packaging. Not

only will the robotics improve efficiency and reduce medication distribution errors, but it will also make pharmacists more available in non-dispensary roles to support residents.

You support the environment. A grant for up to **\$285,000**, supported in part by new donor gifts, will make possible the installation of the first solar panels at Oakwood. Panels are scheduled to be installed on the rooftop of Settlers Ridge, a priority due to its south-facing exposure, in early Summer 2023.

You provide life enrichment and religion and pastoral care with resources to improve programming. Over **\$115,000** in grants were approved for use in 2023 for resident programming at Prairie Ridge and University Woods, including virtual reality software, spiritual resource library materials, fitness equipment, chapel furnishings, rickshaw maintenance, and sound and lighting enhancements to the most popular spaces on Oakwood's two campuses.

Your gifts are needed, appreciated, and put to use every day at Prairie Ridge and University Woods. Thank you for making a difference in the daily work of our staff members and in the lives of our residents.

Check Out Charitable Gift Annuities in 2023!

For the first time ever, donors may use their Required Minimum Distribution to create a Charitable Gift Annuity. It can be done using a Qualified Charitable Distribution from your IRA. The new law makes this a one-time only opportunity per donor to use up to \$50,000 from your IRA to start a CGA or Charitable Remainder Trust.

Higher rates and potentially larger tax deductions are two other reasons it may be worth considering a Charitable Gift Annuity (CGA).

CGAs are a gift that returns guaranteed lifetime payments to the donor. Because payments are

guaranteed, a CGA may be a good fit for donors wanting reliable regular payments.

IRS discount rates are rising which could mean a higher potential tax deduction.

CGA rates are based on life expectancy, so the older the donor, the higher the payment.

The Oakwood Foundation does not give tax advice, so you should consult your professional advisor about your situation.

To see if a Charitable Gift Annuity might make sense for you, contact Development Director David Mossner, CFRE at (608) 230-4441 or david.mossner@oakwoodvillage.net

OAKWOOD DONORS, THANK YOU!

In 2022, 909 donor households gave 4,900 gifts totaling \$1,200,827. Thank you for your generosity and heartfelt support for the people (residents and employees) of Oakwood Village.

273 households gave more than \$1,000, while 65 of those donors gave more than \$5,000 in 2022.

Oakwood Foundation has two societies which recognize the way donors give. The **Oak Legacy Circle** recognizes those who notify the Foundation that Oakwood is part of their estate plan and the **Oak Tree Circle** honors donors who give automatically, whether it's employees giving from their paycheck or those giving directly with a credit card, debit card, or with an ACH transfer from your checking account.

People giving \$1,000 or more in a calendar year are recognized as members of the **Oak Society**. Donors giving \$5,000 or more become **Golden Oak Society** members.

Two societies recognize lifetime gifts – the **Lifetime Golden Oak Society** (\$50,000 or more) and the **President's Circle** (\$100,000).

Members of the President's Circle, Lifetime Golden Oak Society, Oak Legacy Circle, and memorial gifts of \$1,000 or more are recognized on campus donors walls, which also recognizes volunteers who receive the Outstanding Service Award.

Thank you

WELCOME NEW 2022 DONOR SOCIETY MEMBERS!

While we deeply appreciate the support of every donor to the Oakwood Foundation, we'd like to use this opportunity to recognize those who joined an Oakwood Foundation donor society **for the first time in 2022**. A complete listing of Oakwood Foundation donors will run in the spring issue of the *Oakwood Outlook*.

OAK SOCIETY

Donors qualify for the Oak Society with calendar year giving of \$1,000. Thanks to the donors who reached that level for the first time in 2022.

Anonymous (10)
Ruth Alt
Evelyn Arnold
Ayres Painting Co.
Connie Burmeister
Jim and Judy Callen
Joyce Carey
Crystal Enslin
John Evans
Charles and Donna Franchino
Mary Frater
Kate Grace
Ted and Linda Gunkel
Wava Haney
Doug and Kathy Johnson
Robert G.* and
Phyllis A. Kauffman*
Gloria Kinast
Chris and Marge Kleinhenz
Mr. David E. Lindorff
John Lipp
Ruth K. Moore
Marje Murray
Mr. and Mrs. John R. Olson
Thomas Pasic and
Sharon Fry Pasic
Pat Paska
Jan Robertson
Warren and Peg Schmidt
Judith Sikora
Todd Smith and Jill Bradshaw
Richard and Elyane Steeves
Walter and Judy Wagener
Scott and Margaret Walker
Faye Whitaker

**In Memoriam*

GOLDEN OAK SOCIETY

The Golden Oak Society recognizes donors with calendar year giving of \$5,000 or more. Thanks to the donors who reached that level for the first time in 2022.

Anonymous (5)
Peter Austin and
Jean Bjorenson
Claire Box
Joyce Bringe
William and Judith Busse
Donna B. Fox
John and Nancy Webster

OAK TREE CIRCLE

The Oak Tree Circle consists of donors who give an automatic monthly gift via credit card, ACH, or paycheck.

Anonymous (12)
Meghann Bandt
Jenny Bitter
Barbara Carr
David G. Cooper
Johanna B. Fabke
Terri Fisch
Susan Husom
Loise W. Kirore
Jennifer Krause
Anna Lange
Breanna Loether
Danesha McGhee
Marje Murray
Amanda Prusak
Monique Pryor
Laurie J. Sachtjen
Warren Schmidt
Katherine Shepard
Judith and Garth Stroble

Dajah Swift
Victoria Thelen
Rayanna Thigpen
Scott and Margaret Walker
Brigette Weber
Haseena Whittaker
Ikea Wills
Xia Xiong
George and Dorothy Zografi

LIFETIME GOLDEN OAK SOCIETY

The Lifetime Golden Oak Society recognizes lifetime giving of \$50,000 or more.

Anonymous (3)
Judy Craig
Margaret Hickman
Bill and Dawn Smith
Our Savior's Lutheran Church
Vogel Foundation
JP Cullen

PRESIDENT'S CIRCLE

The President's Circle recognizes lifetime giving of \$100,000 or more.

Eugene Schey
Vogel Bros. Building Co.

OAK LEGACY CIRCLE

Thank you to donors who named the Oakwood Foundation in their estate plan. The following donors told us of their plan to include Oakwood in their estate during 2022.

Donna and George Beestman
Jan and Jackie Erlandson

REALIZED ESTATE GIFTS

Oakwood honors the memory of friends whose legacy gifts were gratefully received in 2022.

Anonymous (1)
George R. Barry
J.R. Widmer
Suzanne Hodgman

